App User Guide

SwipeSimple

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SwipeSimple

Log In

Log In

Type your email address and password and tap **Sign In**.

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

Upon first login, you may be prompted to change your password.

Stay Logged In

Enable **Stay Logged In** to bypass entering your login credentials when opening the app. You will remain logged in until you choose to log out.

Demo Mode

Explore the app functionalities without signing in by selecting **Demo Mode**.

Demo mode allows users to navigate the app and simulate swiped or keyed transactions.

Dip (EMV) and tap (NFC) transactions can not be simulated in demo mode.

Forgot Password

Tap **Forgot Password** and enter your email address to receive instructions for creating a new password.
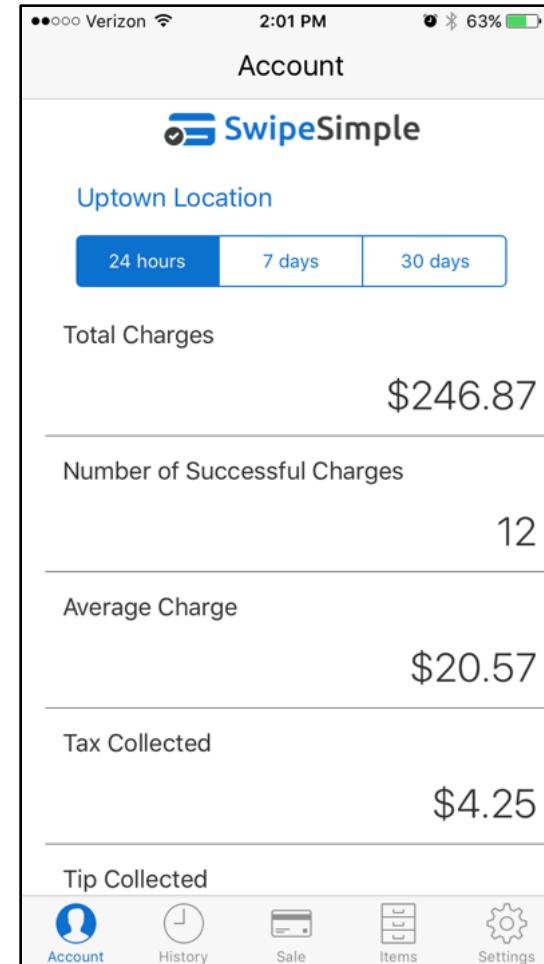
Explore the App

Account

Account displays statistics of your transactions for multiple user accounts including:

- Total Charges

- Number of Successful Charges & Average Charge

- Tax Collected/Tip Collected

Account summary statistics from the last 24 hours, 7 days, or 30 days.

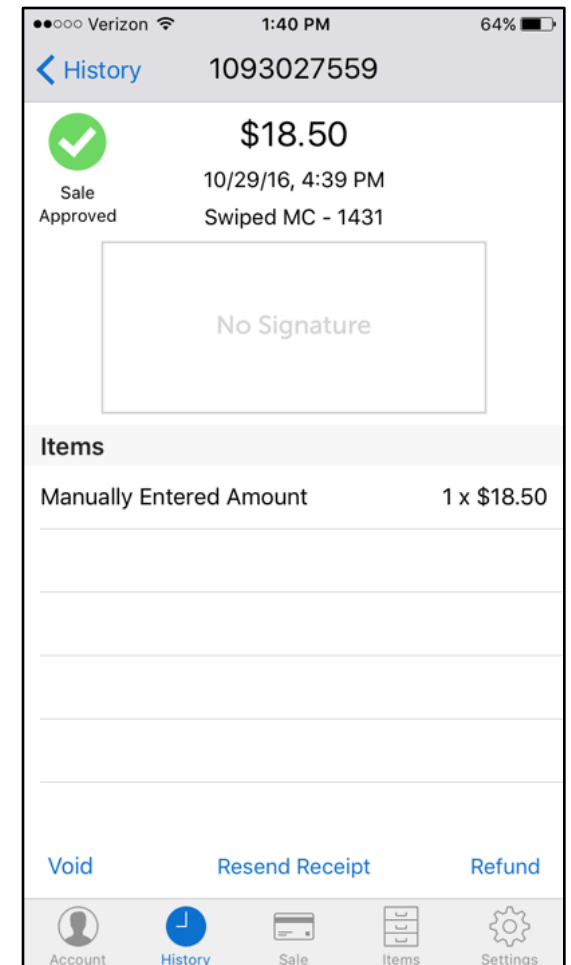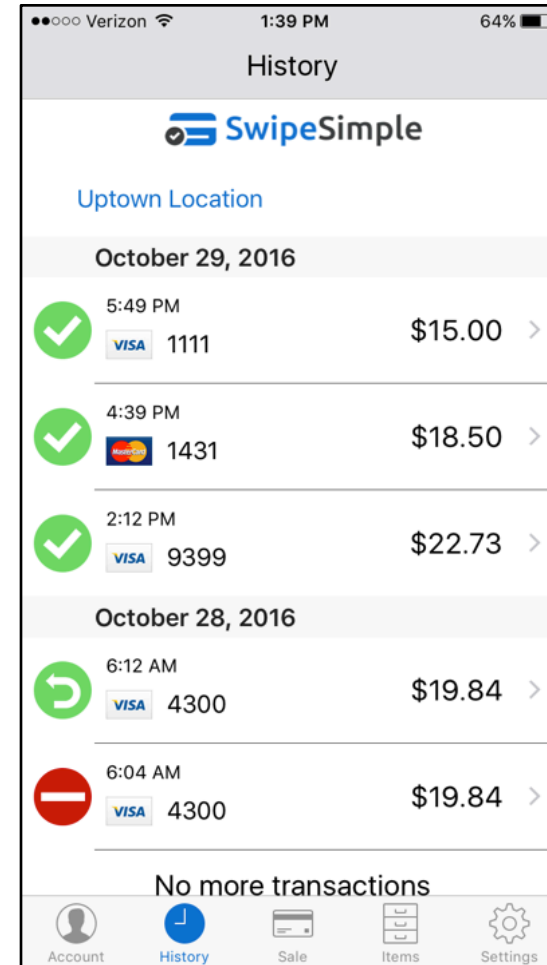# Explore the App

History

History lists previous transactions in historical order, starting from the most recent at the top.

History > Transaction Details

Transaction details include:
- Transaction Status
- Transaction Number
- Transaction Date and Time
- Card Details incl. Card Issuer, last 4 digits of Card Number and Transaction Value
- Send a receipt or issue a full refund, partial refund, or void* a transaction from the transaction details page

* when available

Explore the App

Items

Items lists individual sellable items with price, quantity on hand, and taxability.

Name, price sorting and search provide easy item findability.

Create Item

Create an item by assigning a name, SKU, price, and decide if the item is taxable.

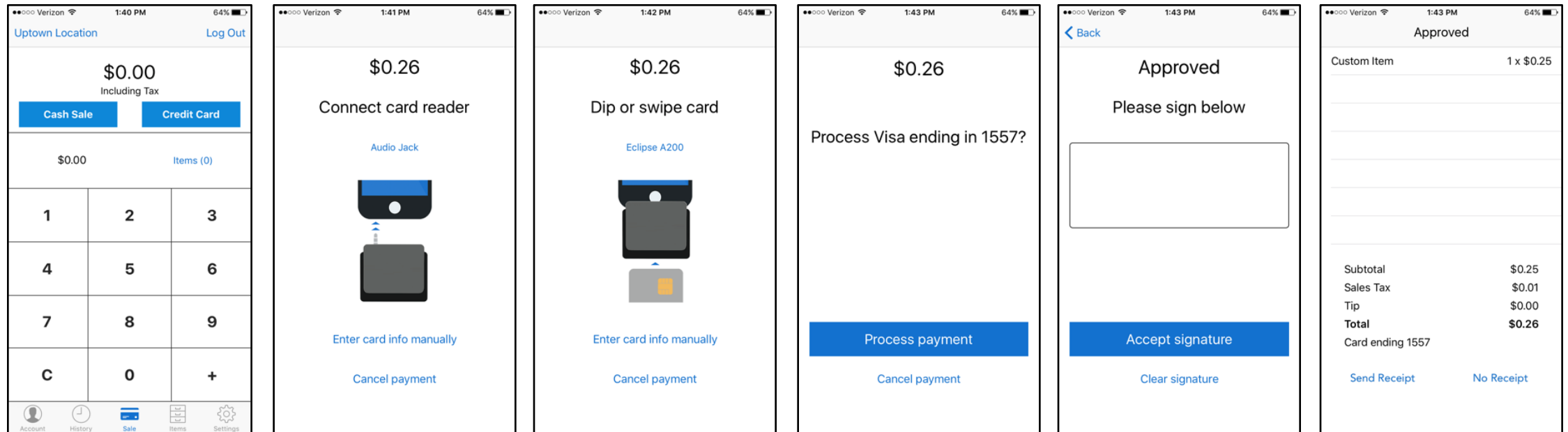Track inventory and set the current quantity to track items on hand.

Take Payments

Express Checkout

1. Enter an **amount**   2. Press **Credit Card**   3. **Connect** your reader*   4**. Swipe/Dip/Tap** or **Key**** the card number   5. **Signature**   6. **Receipt**

*The reader can be connected prior to this step.
**Keyed transactions do not require a reader.

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Add Inventory

Open Item Catalog

Select **Items (0)**.

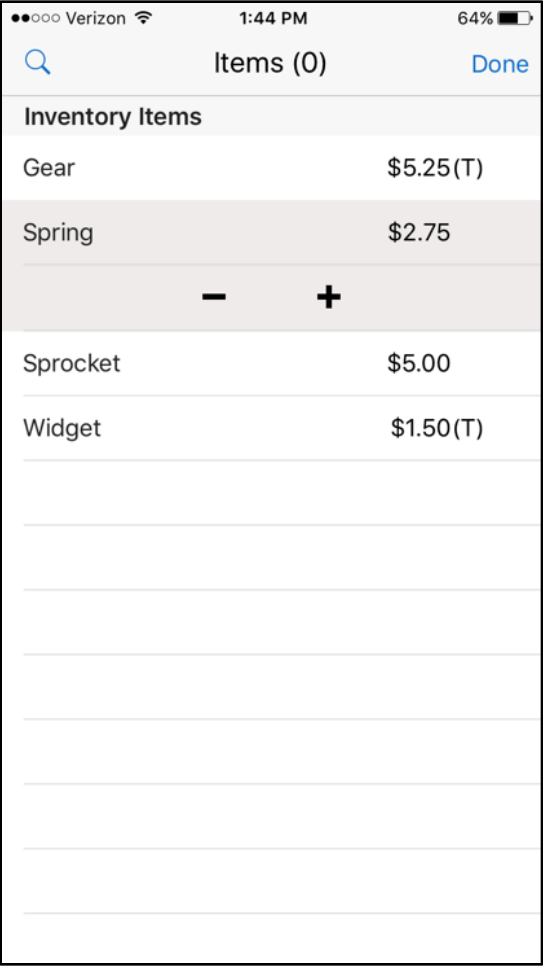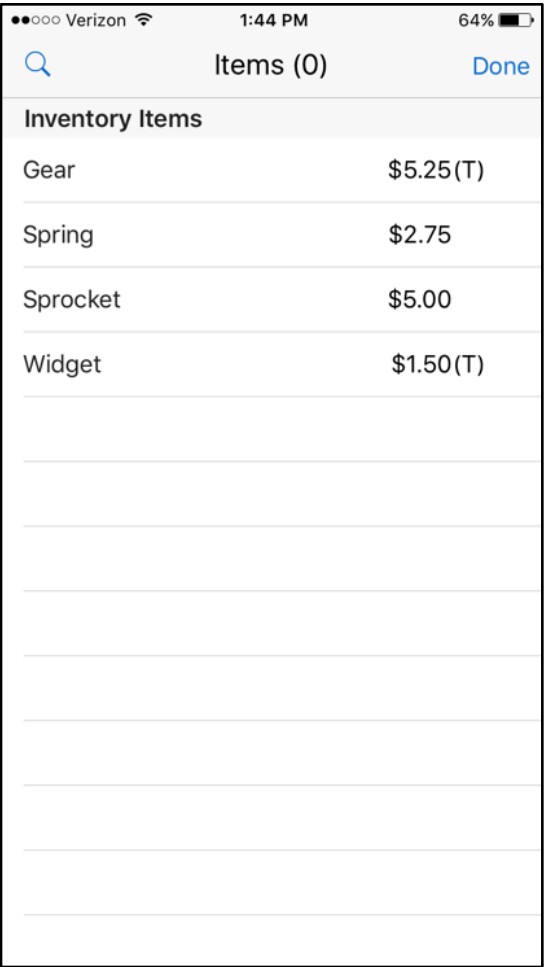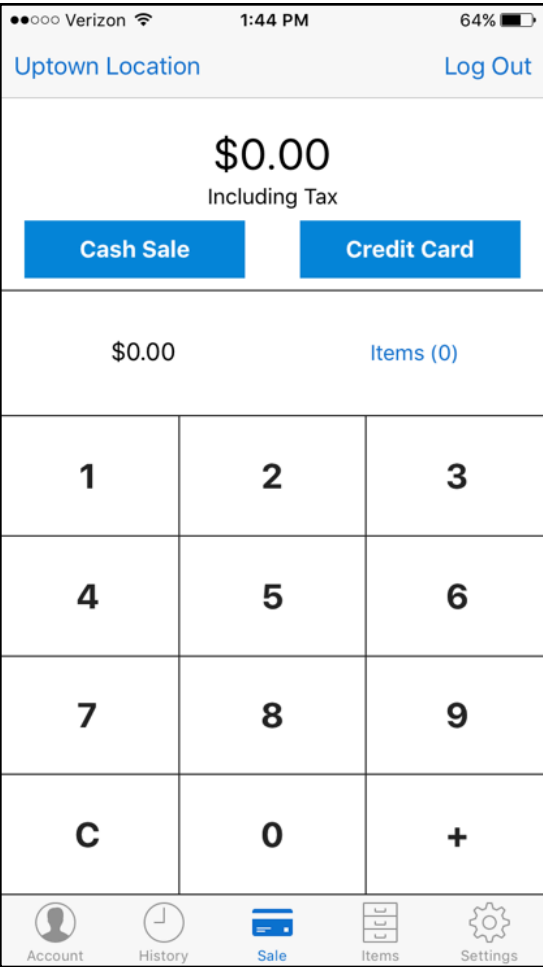The **(#)** shows the current count of items on your transaction

Select Item to Add

Select the item(s) you want to add from the list.

Search allows quick findability for a particular item.

Adjust Item Quantity

Select an item to increase or decrease the desired quantity using the plus **(+)** or minus **(-)** sign below the selected item.

Add Custom Items

Enter Item Amount

Enter the amount to charge using the keypad.
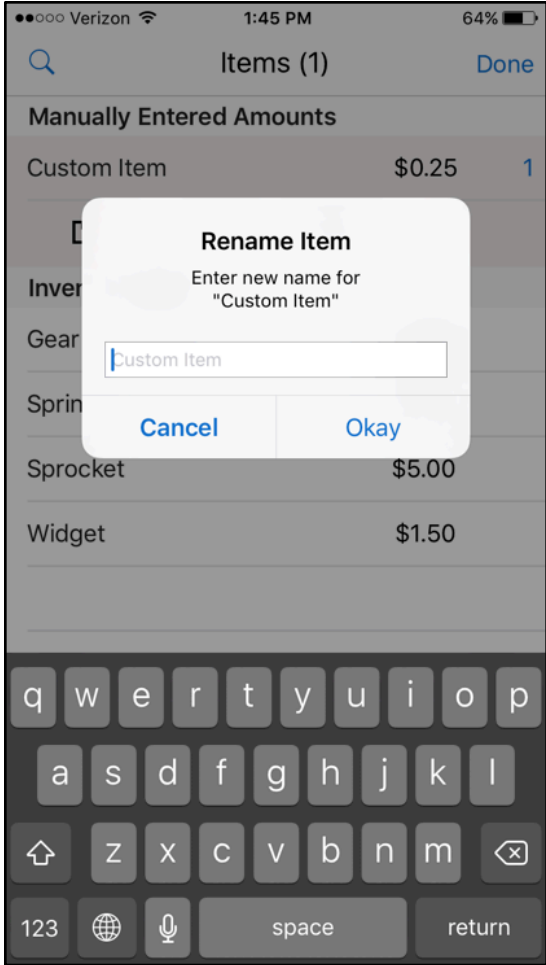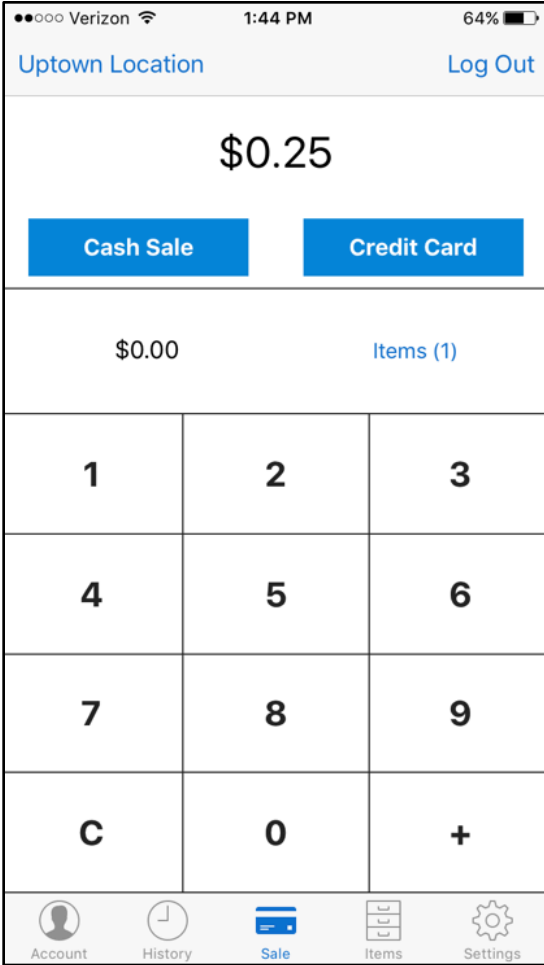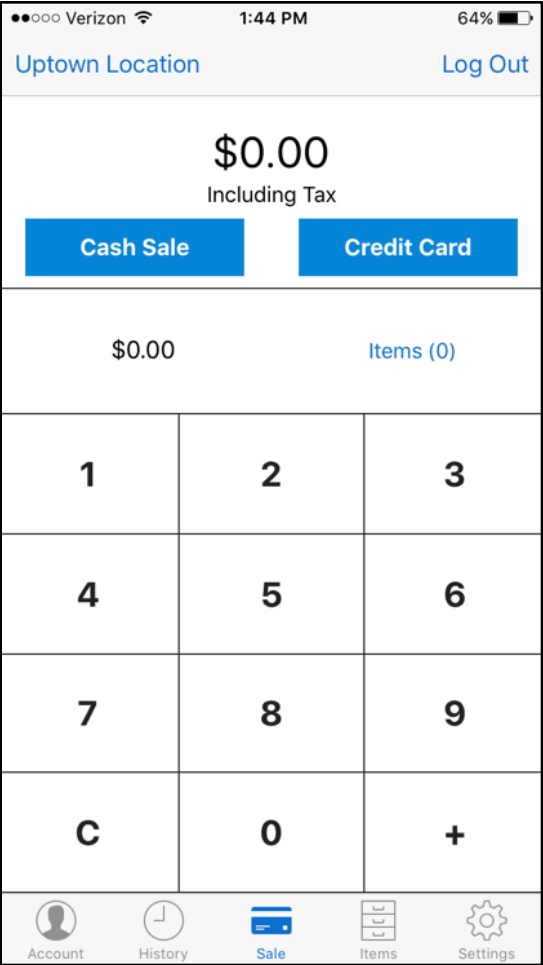
Add to Transaction

Select **Cash Sale** or **Credit Card** to proceed with the amount entered.

Add another item to the sale by tapping **(+)** and entering another amount.

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Rename Custom Item

Tap **Items(1)** and select the **Custom Item** listing.

Tap the ⬜ icon and enter a new name for the Custom Item
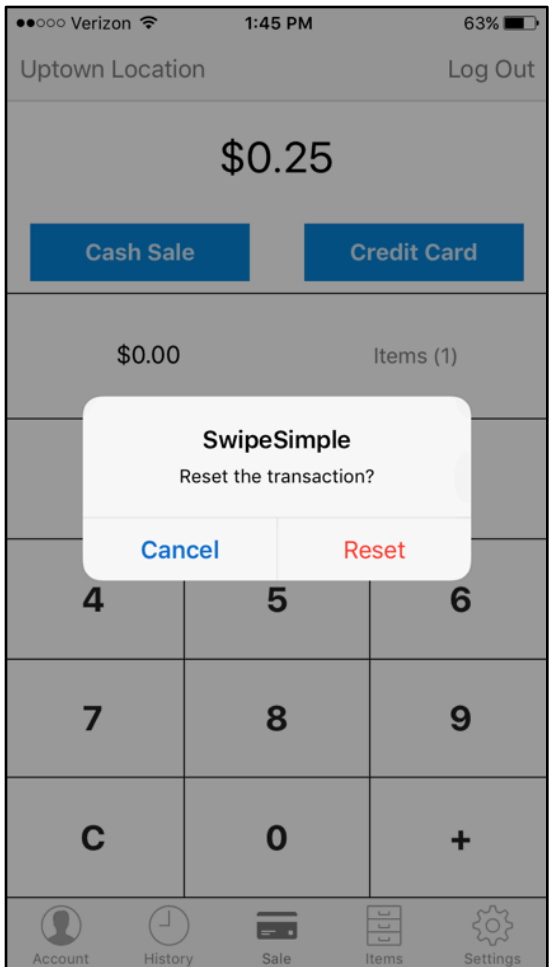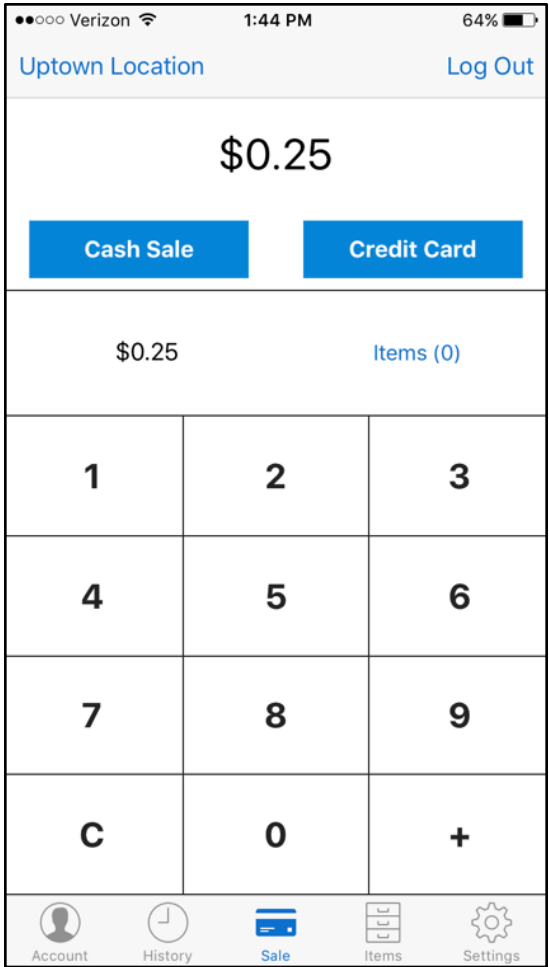
Add Custom Items

Proceed to Checkout

Select **Cash Sale** or **Credit Card** to proceed with the amount entered.

Reset Current Transaction
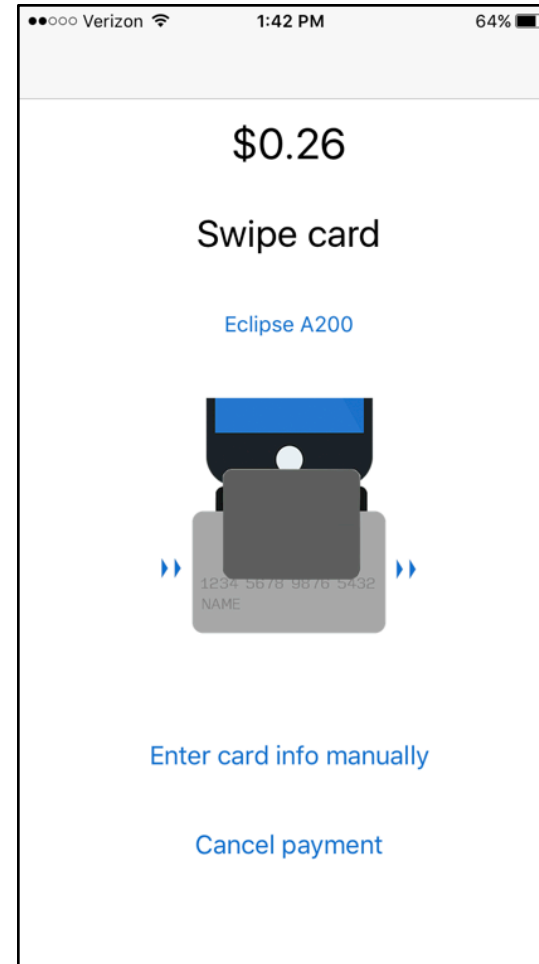
Tap **C** to clear the entered amount.

Double tap **C** to reset the entire transaction.

Ways to Capture Card Information

Swipe

When using a non-EMV capable reader (i.e. Element A100) and your customer presents a magnetic stripe card, swipe the credit card through the open-ended slot at the front of the reader with the magnetic stripe facing the back of the reader.
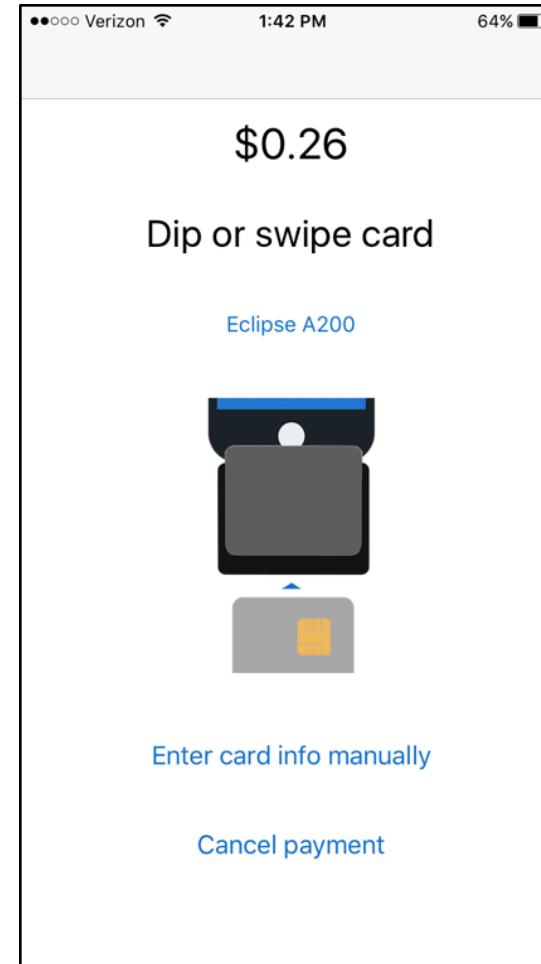
Ways to Capture Card Information

Dip

When using:

✓ an EMV capable reader (i.e. Eclipse A200 or Bold B550)

✓ an EMV enabled merchant account

✓ The customer presents a credit card with a chip

Dip the credit card in the reader in the enclosed slot to process an EMV transaction.

Be sure that the card is placed chip-first, with the chip facing the front of the reader.
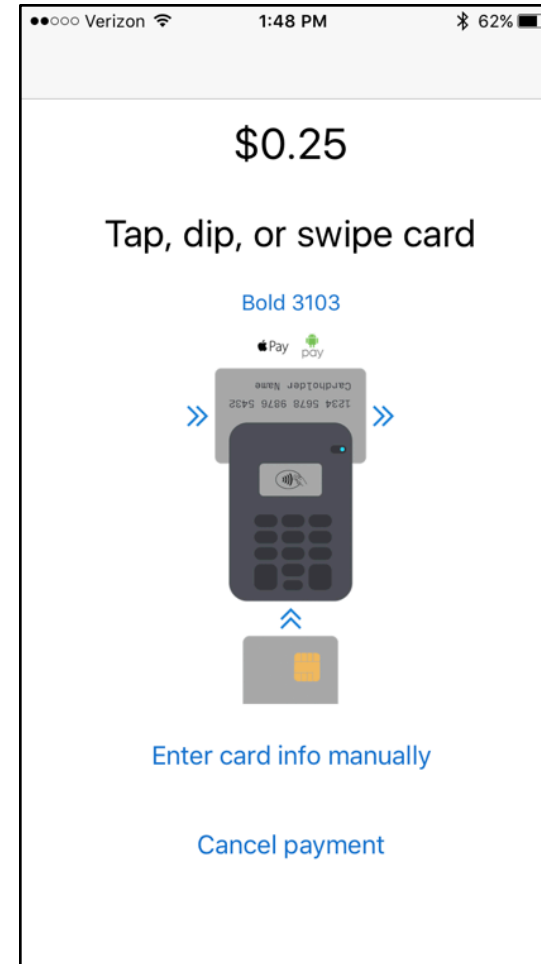
Ways to Capture Card Information

Tap

When using:

- ✓ a Bold B550 reader

- ✓ a First Data Omaha EMV enabled merchant account

- ✓ The customer presents a contactless payment enabled credit card or mobile device

Tap the card or mobile device to the B550 reader to capture their credit card payment.

The four green lights on the top of the device will illuminate to show that the tap has been recognized.

$0.25

Tap, dip, or swipe card

Bold 3103

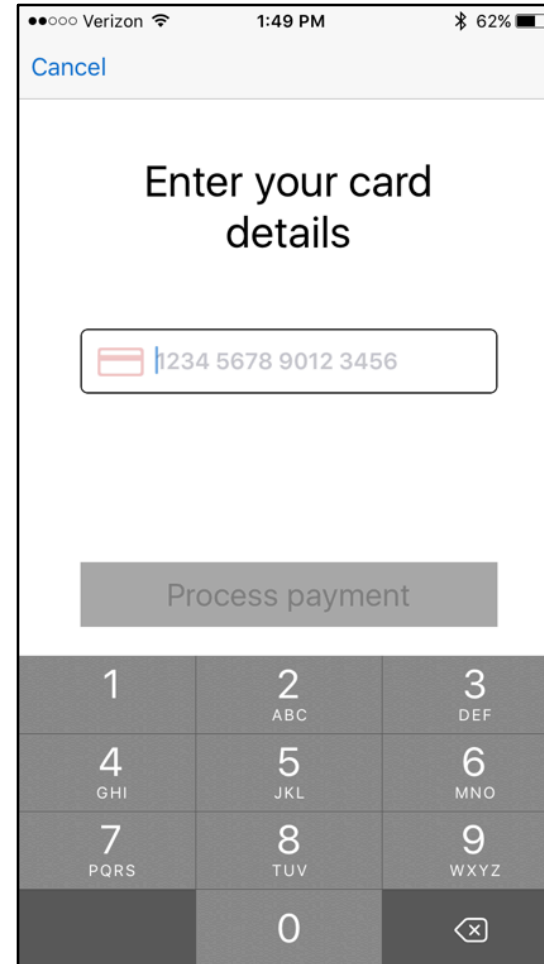Enter card info manually

Cancel payment

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Ways to Capture Card Information

Key

If you do not have a reader, key in the card number with the keypad on your phone.

Enter the card number, expiration date, CVV number on the back of the card, and zip code to process the payment.

Customer Signature

Capture Signature

Your customer can sign by drawing their signature on your phone or tablet's screen when a signature CVM (Customer Verification Method) is required.

Send Receipt

Text or Email Receipt to Customer

Tap **Send Receipt** to provide a receipt for your customer. Enter your customer's **email address** or **phone number** to send a receipt as email or text.

You can always send a receipt later from the transaction details screen in the Transaction History.

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Refund

Refund

Select **Refund** on a transaction detail screen and enter the amount you wish to refund for that transaction.

* It may take up to 7-10 days for refunds to be processed. Please contact your merchant service provider for more information.

Partial Refund

You can refund an amount less than the total of a transaction. The result of your full or partial refund will show up as a new record in the History screen.

To refund the remaining balance of a transaction, or to perform another partial refund for an amount less than the remaining balance, return to the original transaction listing.
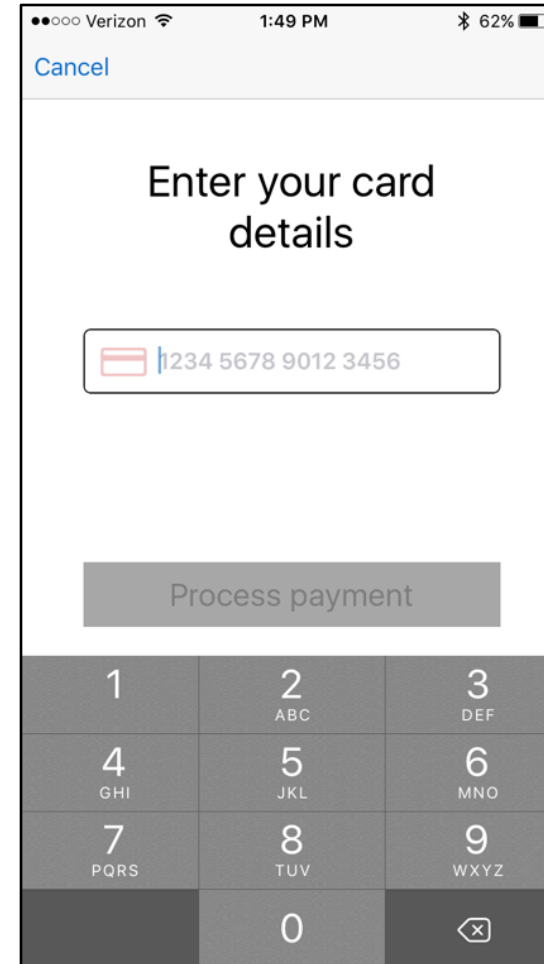
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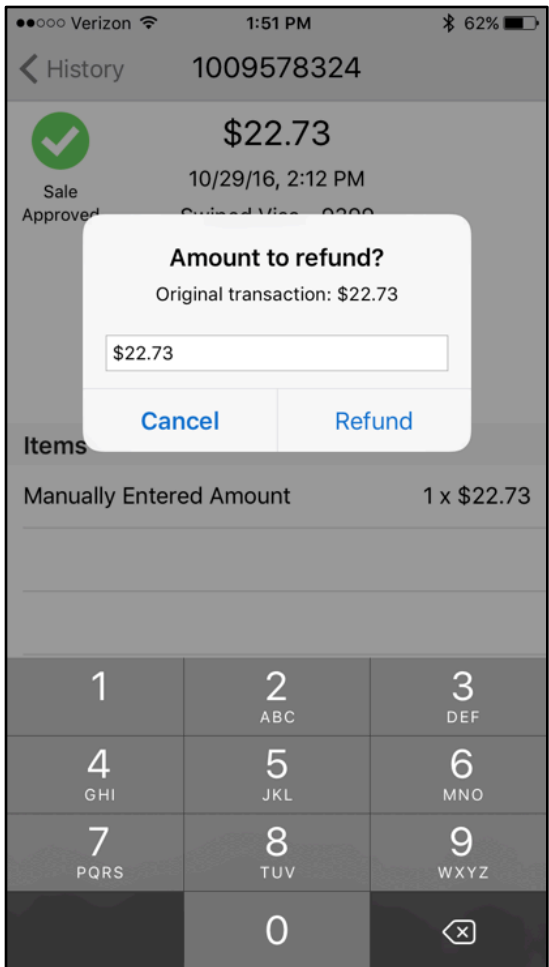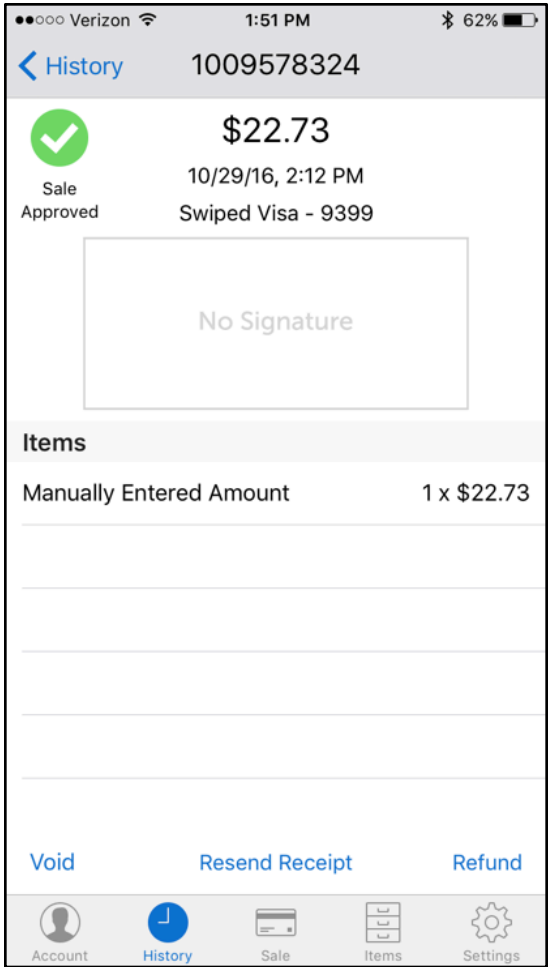
Void

Void

Select **Void** on transaction detail screen to void a selected transaction.

If the void option is not displayed, the transaction can no longer be voided. Please contact your merchant service provider for more information for this instance.
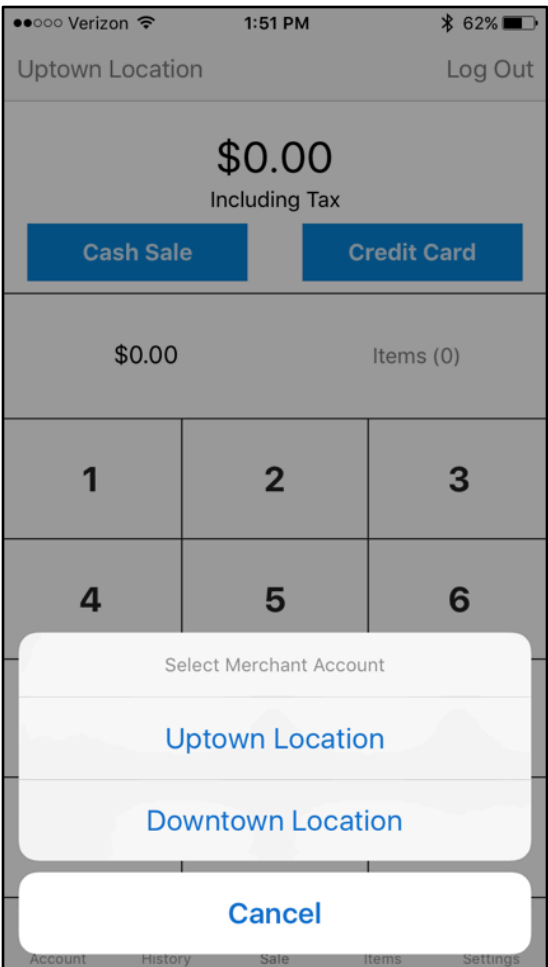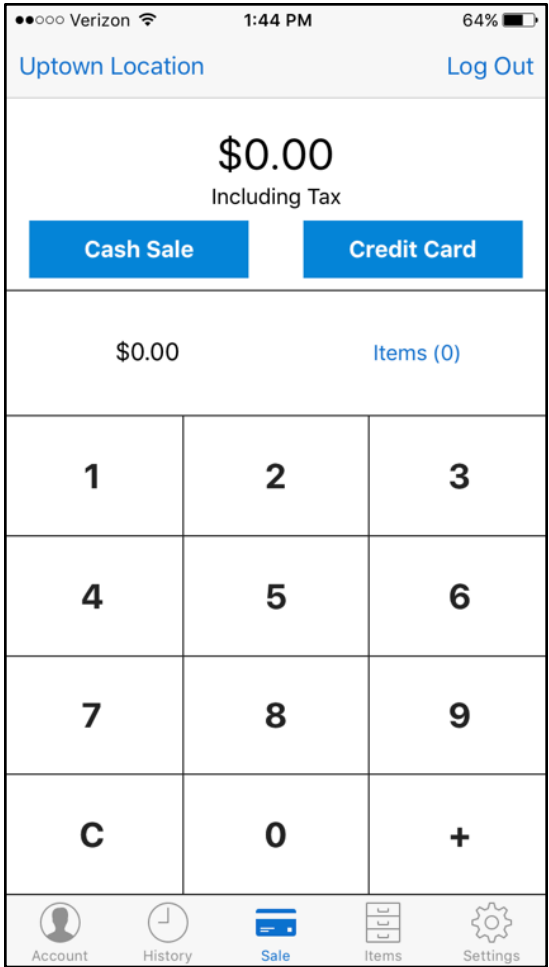
Multiple Merchant Accounts

Managing Multiple Merchant Accounts

If you have multiple merchant accounts tied to your SwipeSimple account, an Administrator can change the selected Merchant Account by tapping the Merchant Account Name.

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Settings - Configuration

Settings

From the Settings, set preferences for non-EMV signature requirements, sales tax, and tips.

You can also access support contact details and information about the app.
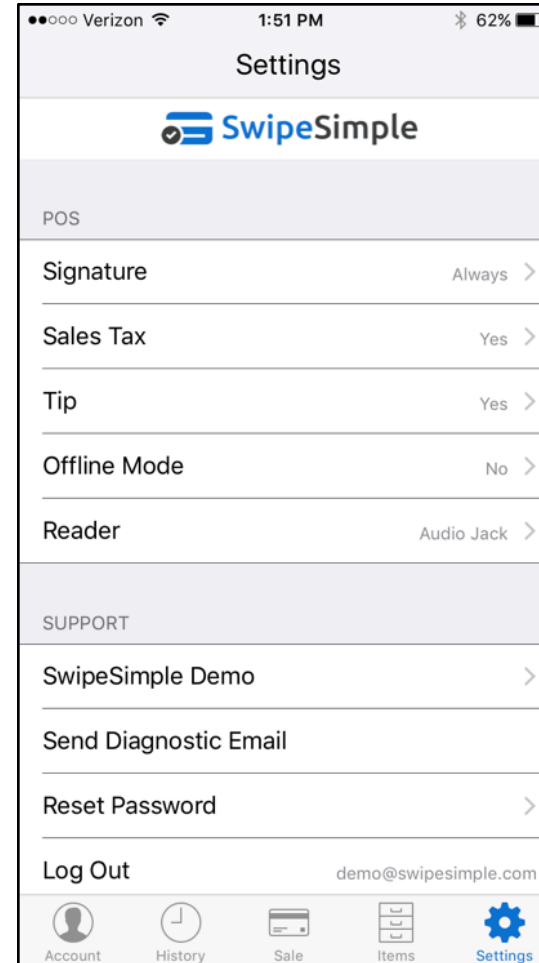
Settings - Signature

Signature

For Swipe transactions signature requirements can be configured in the Signature settings. Signature can be captured:

- **Never**

- **Always**

- For transactions **Above $25**

For EMV transactions the requirements for a signature CVM (customer verification method) are driven by the transaction itself.
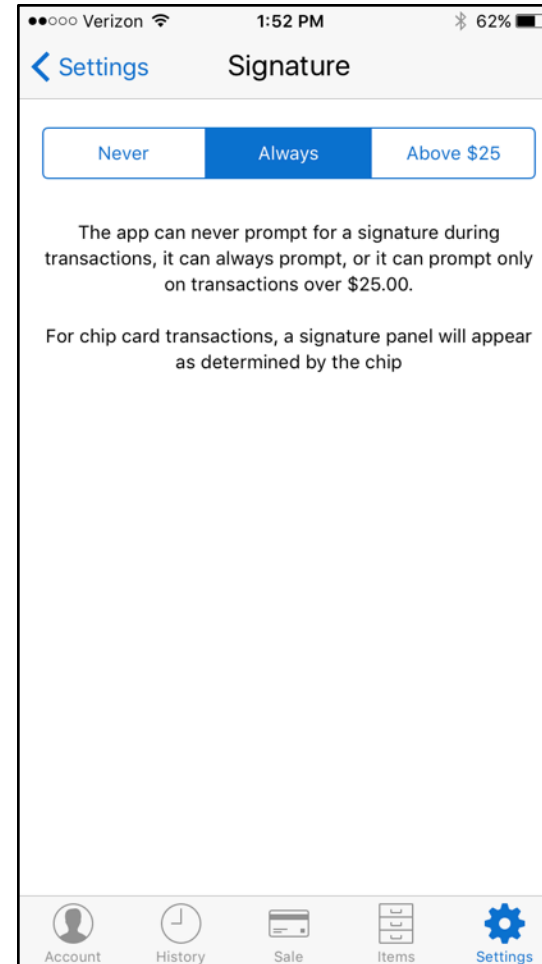
Settings - Sales Tax

Sales Tax

Enable sales tax to collect a defined tax percentage on your transactions.

Sales tax can also be controlled on a per item basis.

Settings - Tip

Tip

Enable tip to present the customer with a tip screen prior to processing their payment. The customer can select from the three default tip amounts set, or enter a custom tip dollar amount.
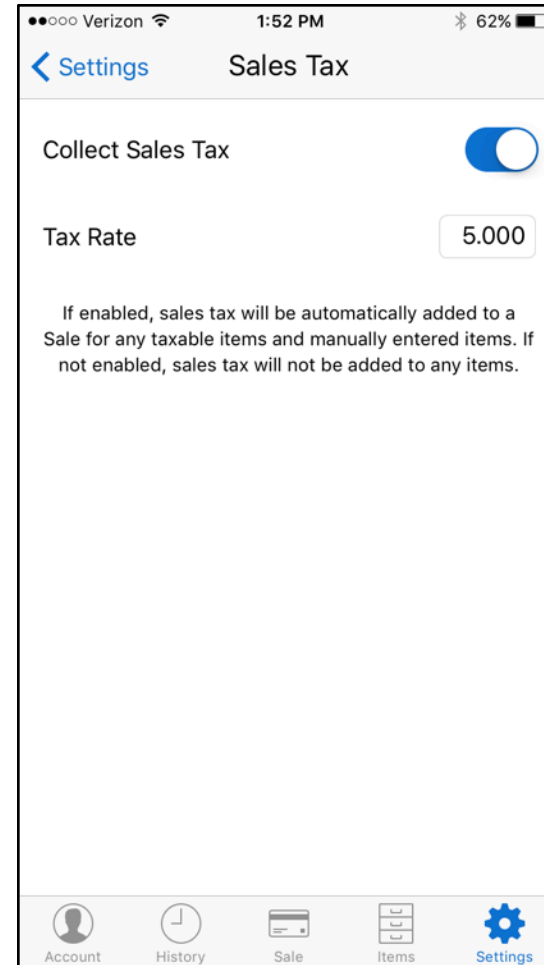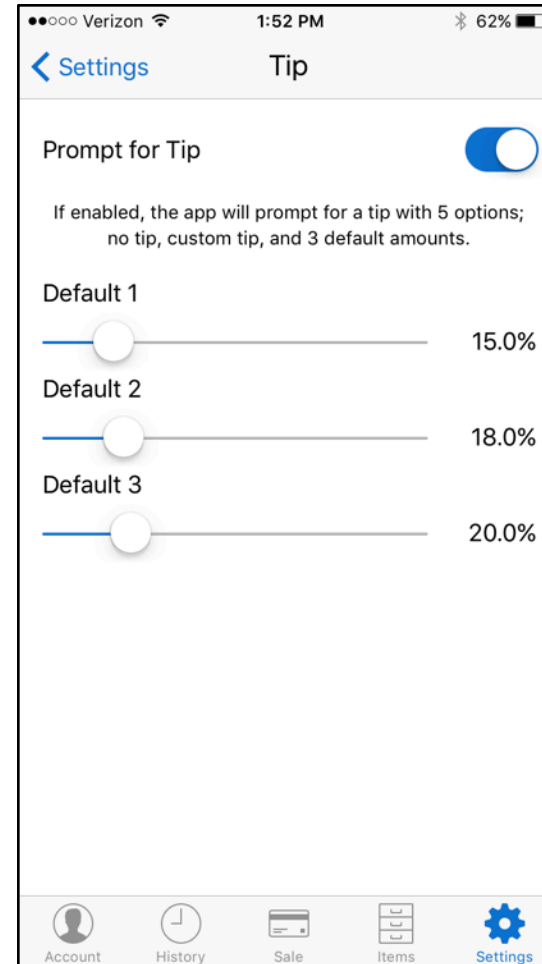
Settings – Offline Mode

Offline Mode

Offline mode enables capturing swiped or keyed payments without an internet connection.

Offline mode is not compatible with dip (EMV) or tap (NFC) transactions.

Set a maximum amount for offline transactions when Offline Mode is enabled. Offline transactions are risky as they are not approved or declined until network connectivity is re-established.

Transactions captured offline are "pending" until connectivity is regained and will automatically process when the mobile device goes back online and the app is opened.

Offline transactions expire 30 days after capture if they are not processed.

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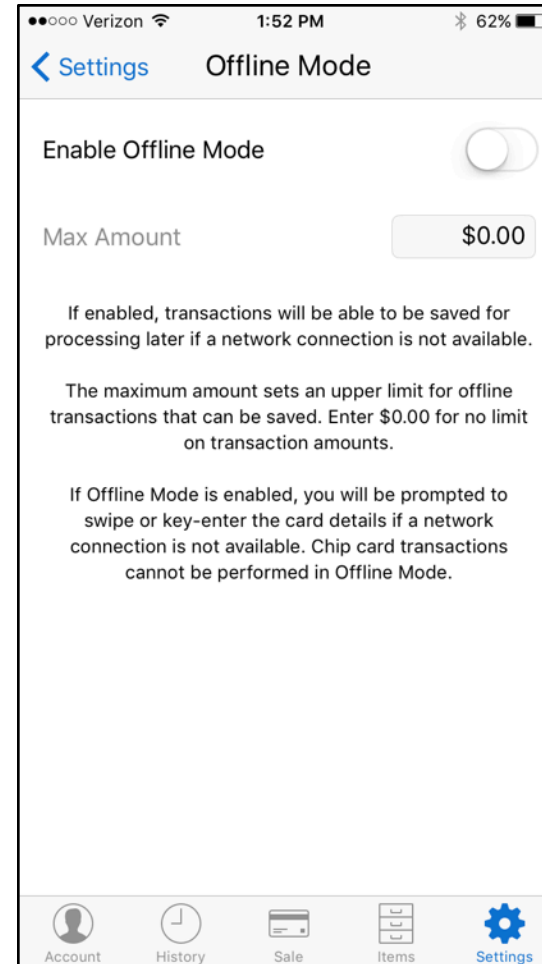
Settings - Reader

Reader

Choose between our **Audio Jack** and **Bluetooth** readers on the Reader screen. Instructions for pairing the Bluetooth reader will appear on the screen when that option is selected.

For Android devices, the pairing process can be completed from the Reader setting screen.

For iOS devices, the pairing process must be completed from the iOS device settings.
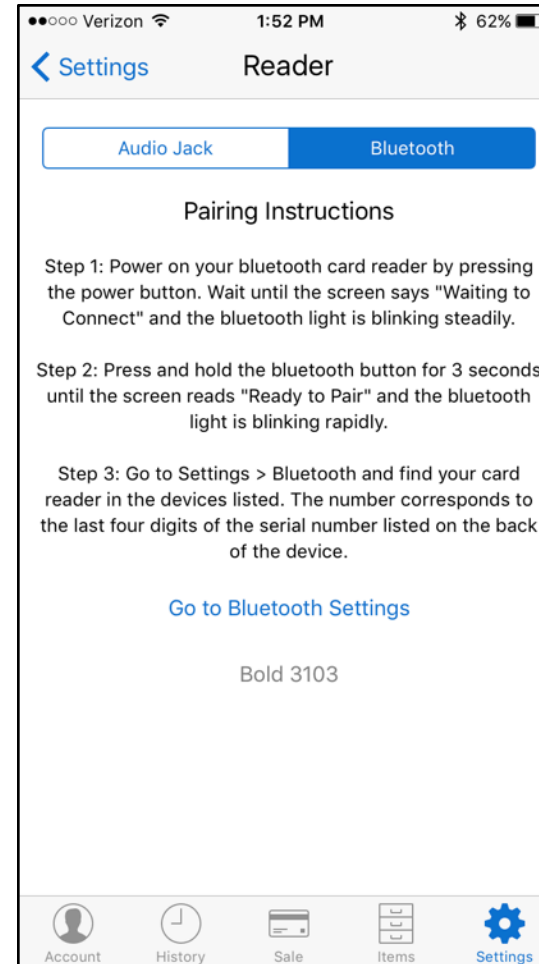
Settings -Diagnostics

Send Diagnostic Email (for iOS)

Technical details can be sent to the support team by tapping **Send Diagnostic Email**.

This email should be sent when directed by a support representative.

Diagnostic Tools (for Android)

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

These details can be sent to a support representative by tapping the mail button on the screen.

This email should be sent when directed by a support representative.
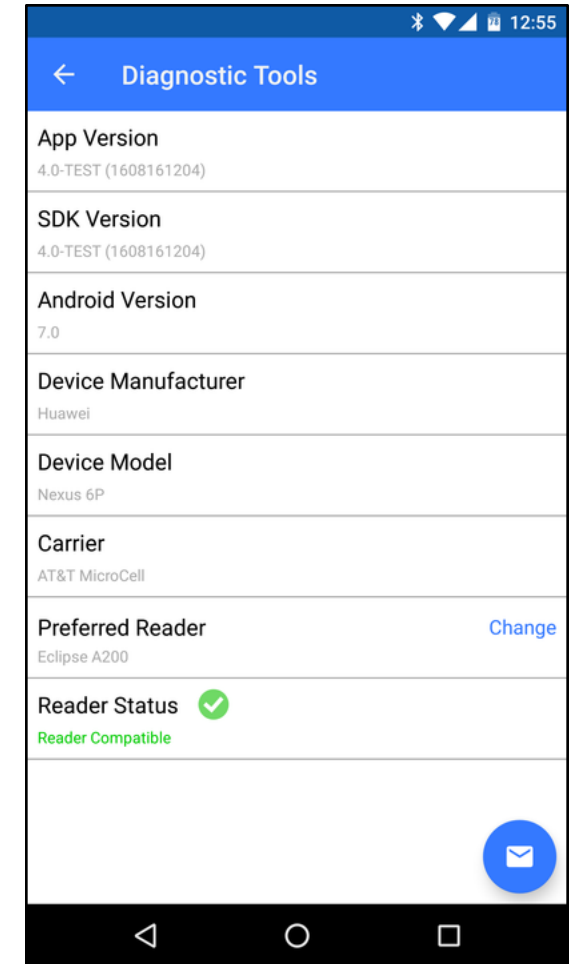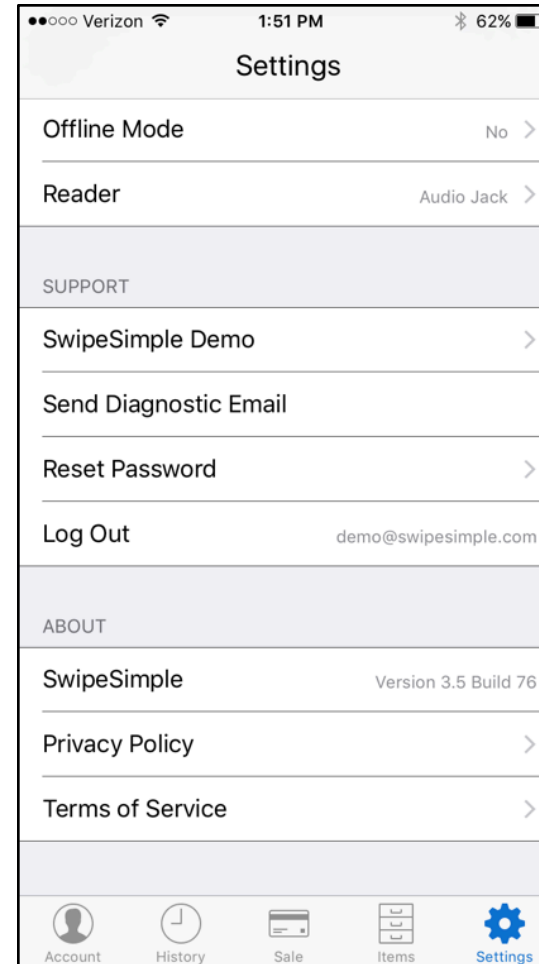
Help

Contact

Are you still having trouble using the app and your card reader?

Contact your merchant services provider and they will be able to assist with more details specific to your account.

If you don't know who your merchant services provider is, you can email us at support@swipesimple.com with the subject line "**please help me contact my merchant services provider**", and include **the name of your account**.

One of our associates will reply to you with the appropriate contact info.

Our support hours are Monday - Friday 9am - 6pm EST.

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