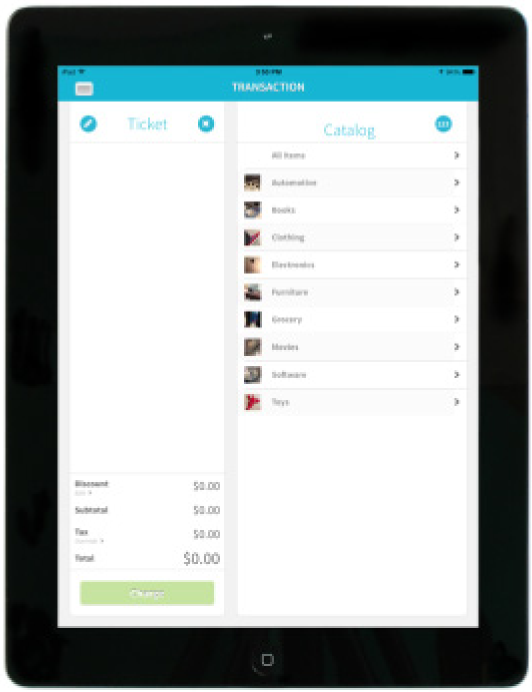

QuickSwipe

QuickSwipe Web User Guide

Bluefin Payment Systems

Release 12/20/2013

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Overview

QuickSwipe is a mobile payment application that allows you to process credit card, check, and cash transactions using an iOS device. QuickSwipe allows you to maintain a catalog of items for transactions and manage which users have access to the application. QuickSwipe also has a web interface which allows you to view transaction history, manage the catalog, and manage users and settings.

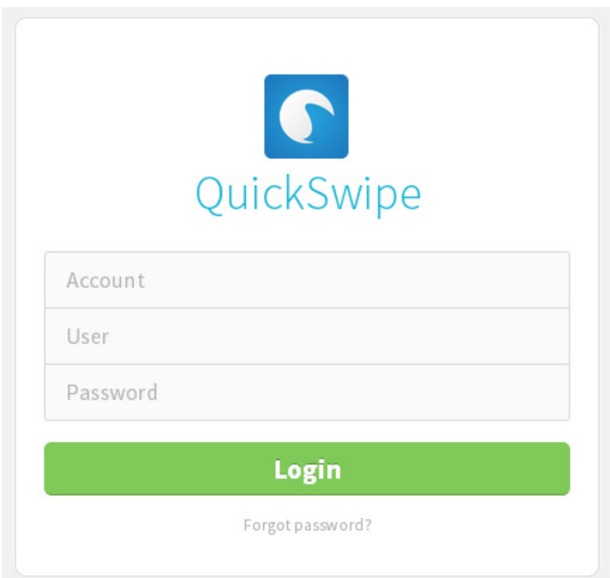
Log In

To log in to the web interface, follow these steps:

1. In your browser, navigate to:

   https://mobile.quickswipe.com/

2. The following screen displays:



3. Enter the following information:

Field	Description
Account	Your PayConex ID.
User	The email address at which you received your invite.
Password	The password you created when you followed the instructions in the invite email.

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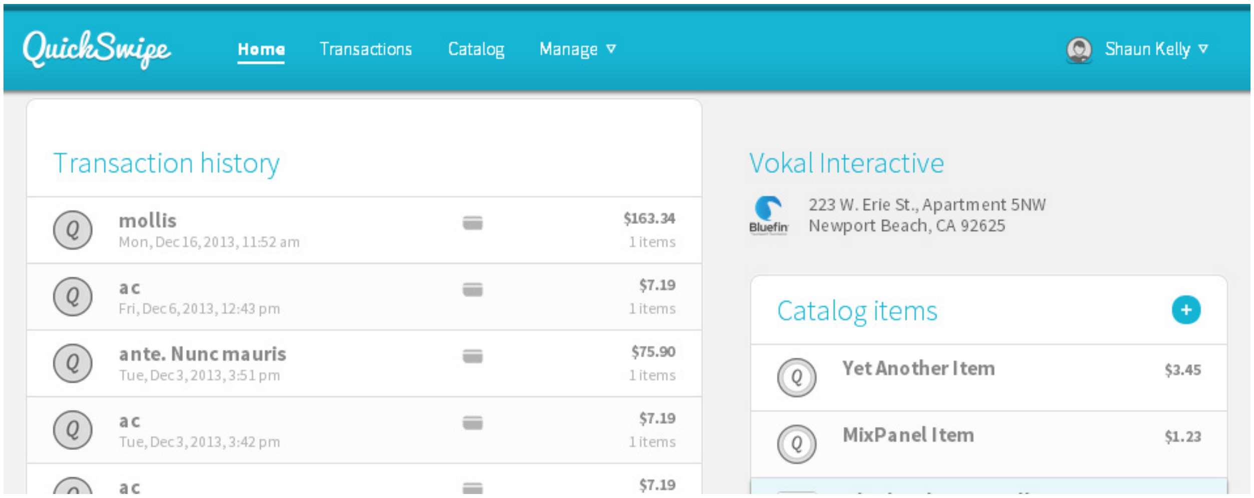
4. Click **Login**.

   The QuickSwipe dashboard displays:



If you forgot your password, click the **Forgot password?** link to reset your password. Enter your account number and email address. QuickSwipe emails instructions for resetting your password.

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Management

The management section of the application allows you create and edit users (web only) and update settings for the application.

- Managing Users - Each account can have any number of users enabled to log in to the web application and iOS app. Use the web interface to add, edit, and disable users and determine the actions each user can take in QuickSwipe.
- Updating settings - The settings area allows you to customize the type of information prompted for in each transaction, clerk permissions and taxes as well as to customize the interface to match your company.

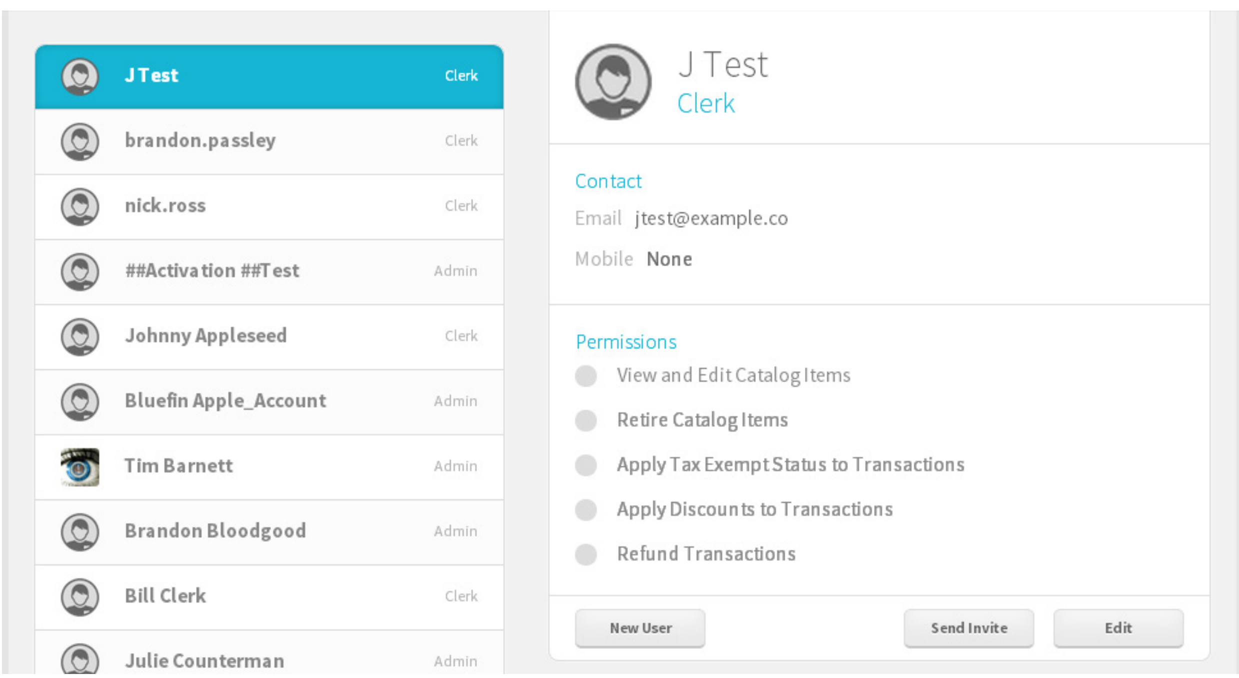
Users

There are two type of users in QuickSwipe:

- **Clerk** - Clerks log in to the iOS app to perform transactions and may have additional abilities to edit catalog items and perform refunds, depending on their permissions.
- **Admin** - Admins have all the abilities of clerks along with the additional ability to manage users in the web application.

To manage users, select Users from the Manage menu.

The users screen displays:



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The list on the left shows all users set up for the merchant. Details about the selected user display on the right side of the screen.

See the following sections for more instructions:

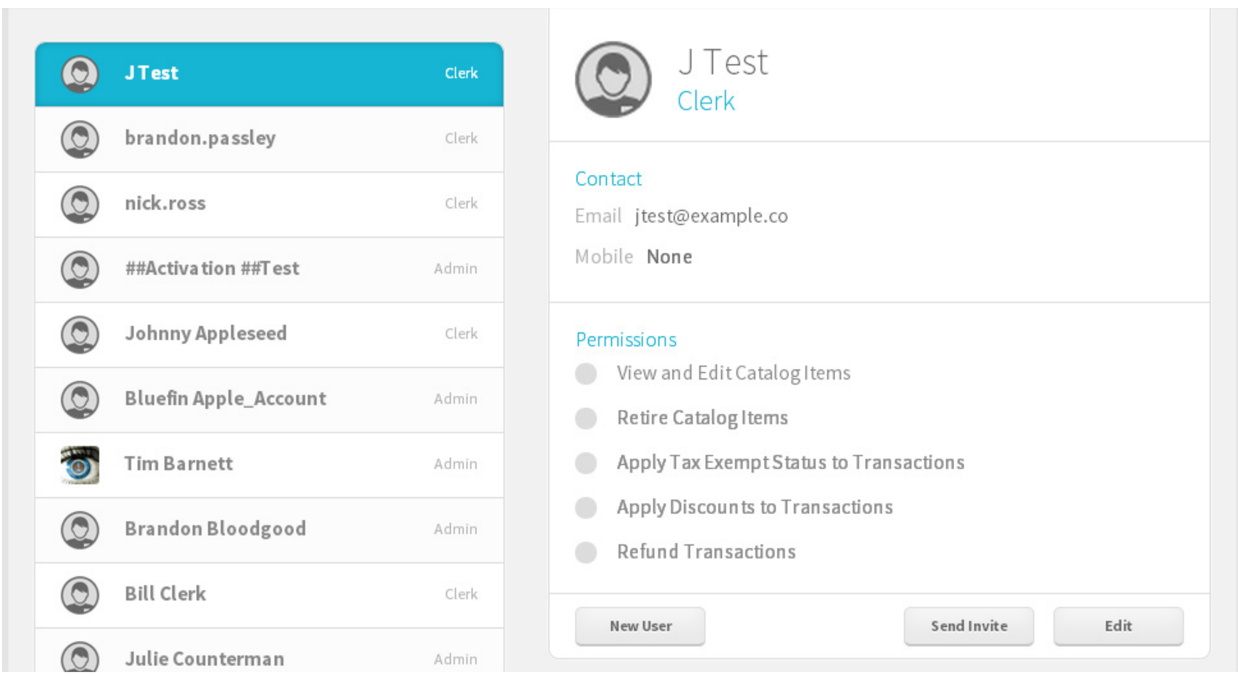
- Adding a User
- Editing a User
- Deleting a User

Adding Users

To add a new user, follow these steps:

1. Select **Users** from the **Manage** menu.

   The users screen displays:



2. Click **New User**.

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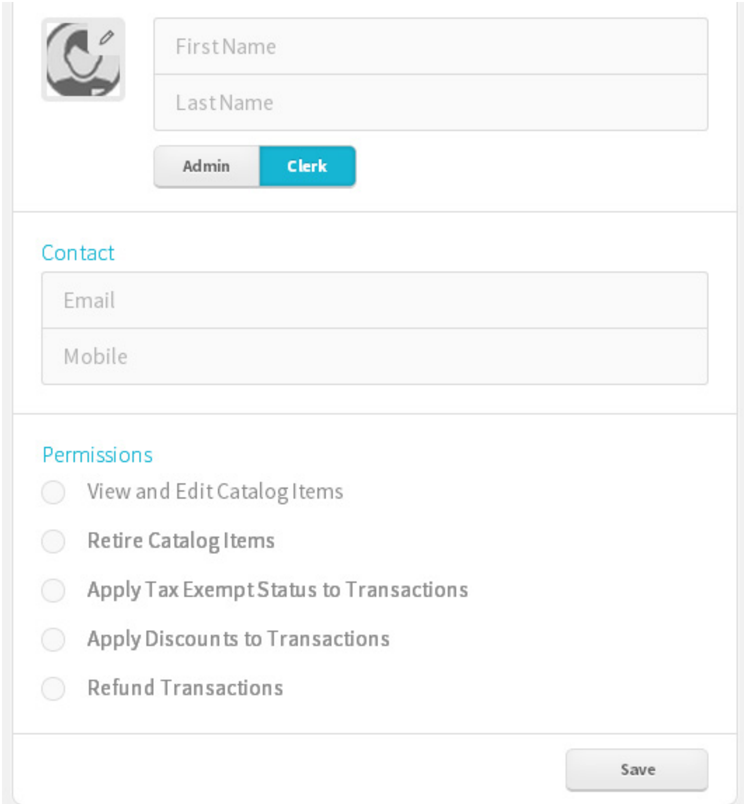
3. The New User screen displays:



4. Complete the fields on this screen.

Field	Description
User Icon	Click the user icon and select a picture to set the user's icon image.
First Name	Required. Enter the user's first name.
Last Name	Required. Enter the user's last name.
Admin/Clerk	Select Admin or Clerk to set the user's permission level.
Email	Required. Enter the user's email address.
Mobile	Enter the user's mobile phone number.
Permissions	Select each permission to grant the user. Permissions are: • View and Edit Catalog Items • Retire Catalog Items

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Field	Description
	• Apply Tax Exempt Status to Transactions • Apply Discounts to Transactions • Refund Transactions

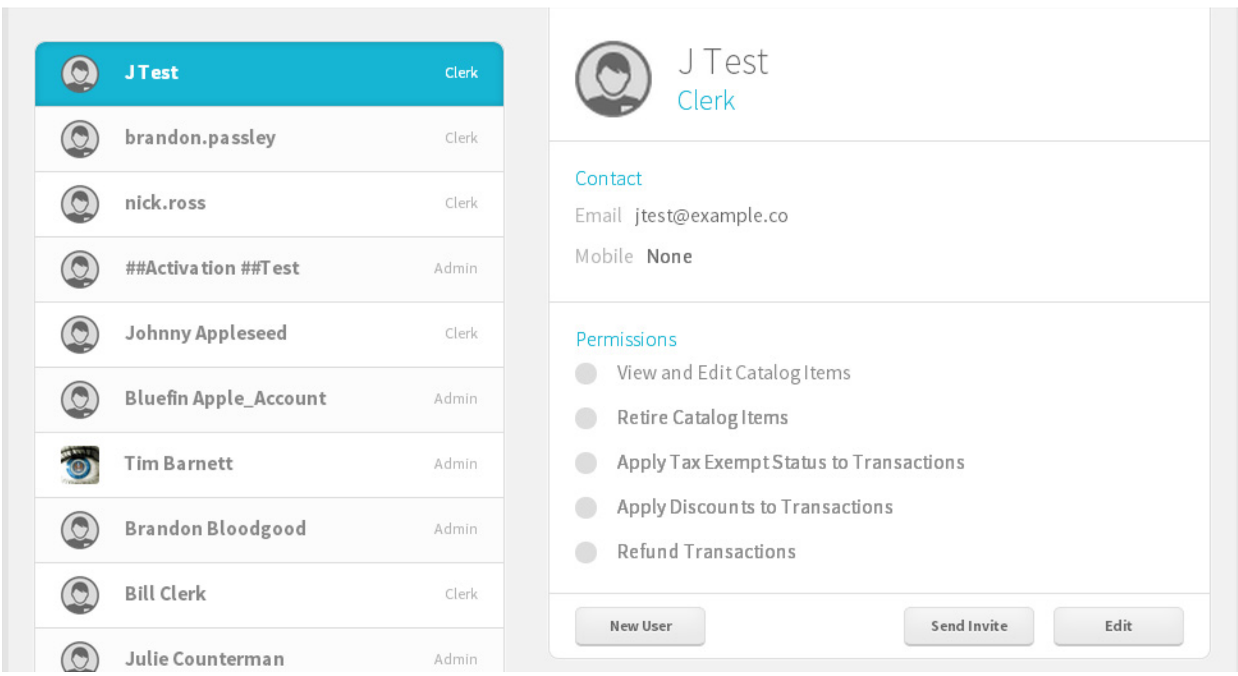
5. Click **Save** to add the new user.

Editing Users

To edit an existing user, follow these steps:

1. Select **Users** from the **Manage** menu.

   The users screen displays:



2. Select the user you want to edit and click **Edit**.

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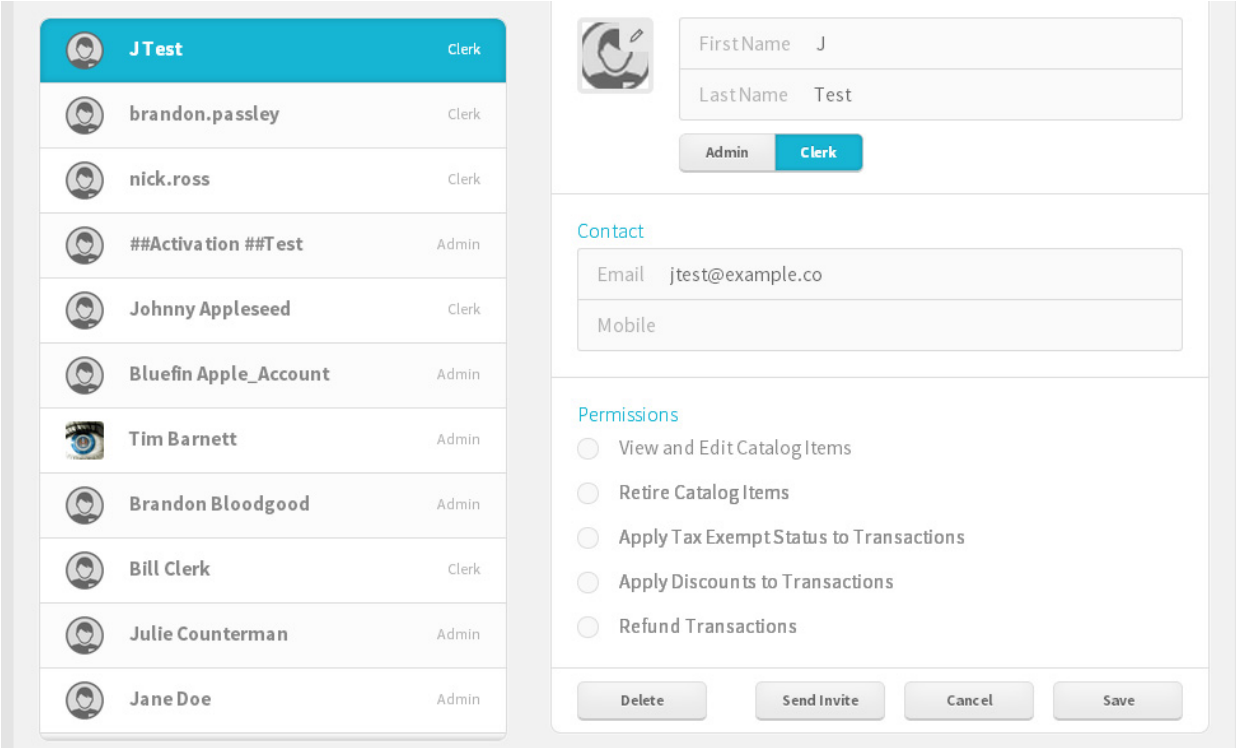
The user's details display:



3. Update the fields you want to edit.

Field	Description
User Icon	Click the user icon and select a picture to set the user's icon image.
First Name	Required. Enter the user's first name.
Last Name	Required. Enter the user's last name.
Admin/Clerk	Select Admin or Clerk to set the user's permission level.
Email	Required. Enter the user's email address.
Mobile	Enter the user's mobile phone number.
Permissions	Select each permission to grant the user. Permissions are: • View and Edit Catalog Items • Retire Catalog Items • Apply Tax Exempt Status to Transactions

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Field	Description
	• Apply Discounts to Transactions • Refund Transactions

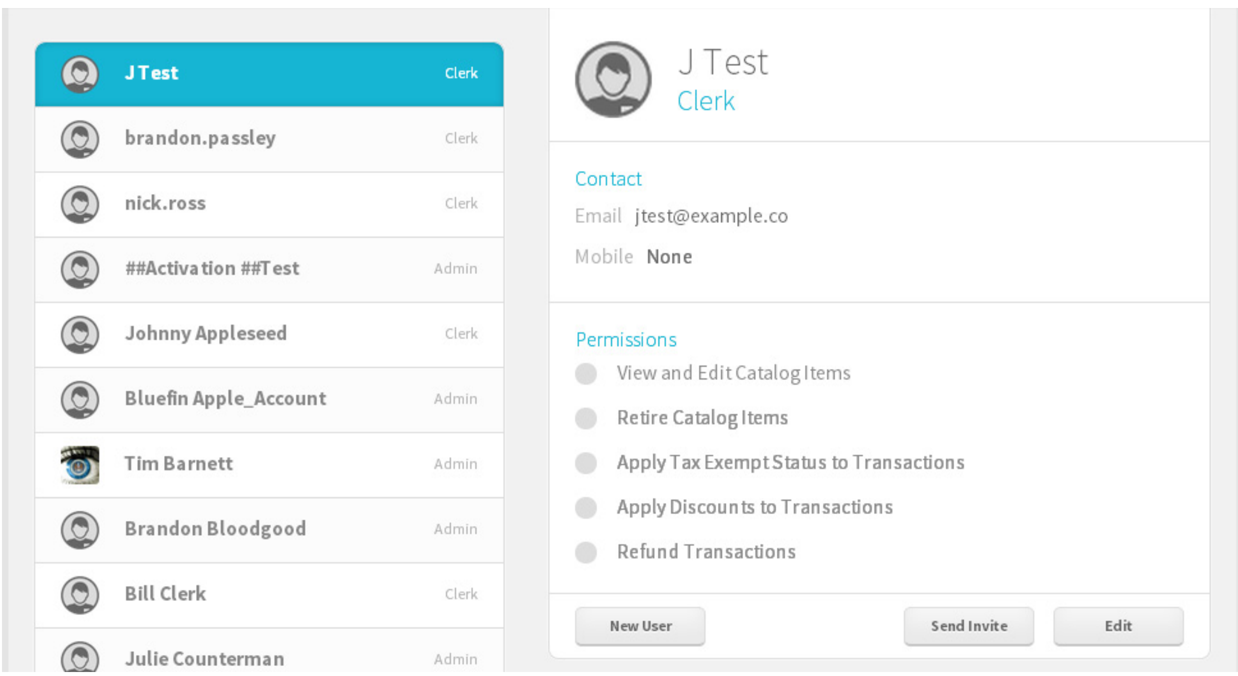
4. If the user has not accepted the email invite, the **Send Invite** button displays on the page. Click **Send Invite** to resend the email invitation to the user.
5. Click **Save** to complete the edits.

Deleting Users

To delete an existing user, follow these steps:

1. Select **Users** from the **Manage** menu.

   The users screen displays:



2. Select the user you want to delete and click **Edit**.

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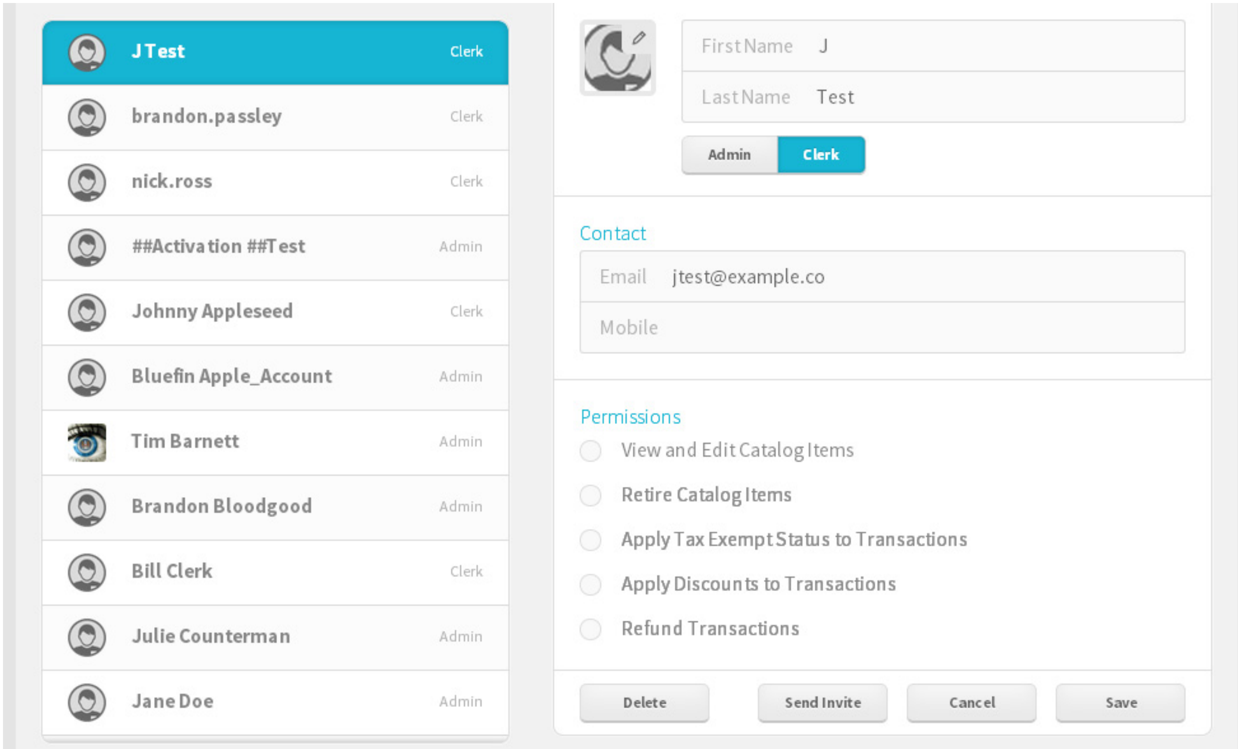
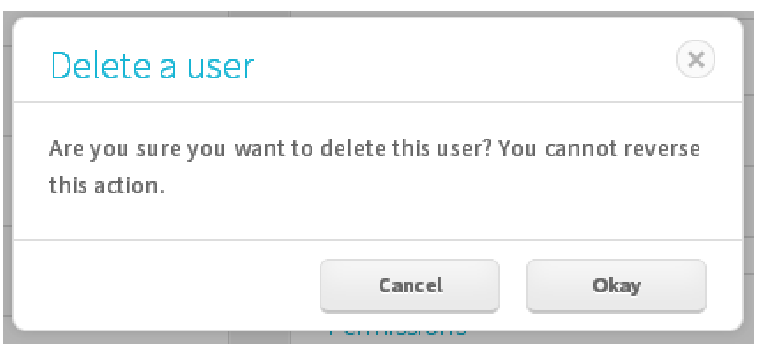
The Edit User screen displays.



3. Click **Delete**.

   The following warning displays:



4. Click **Okay** to delete the user.

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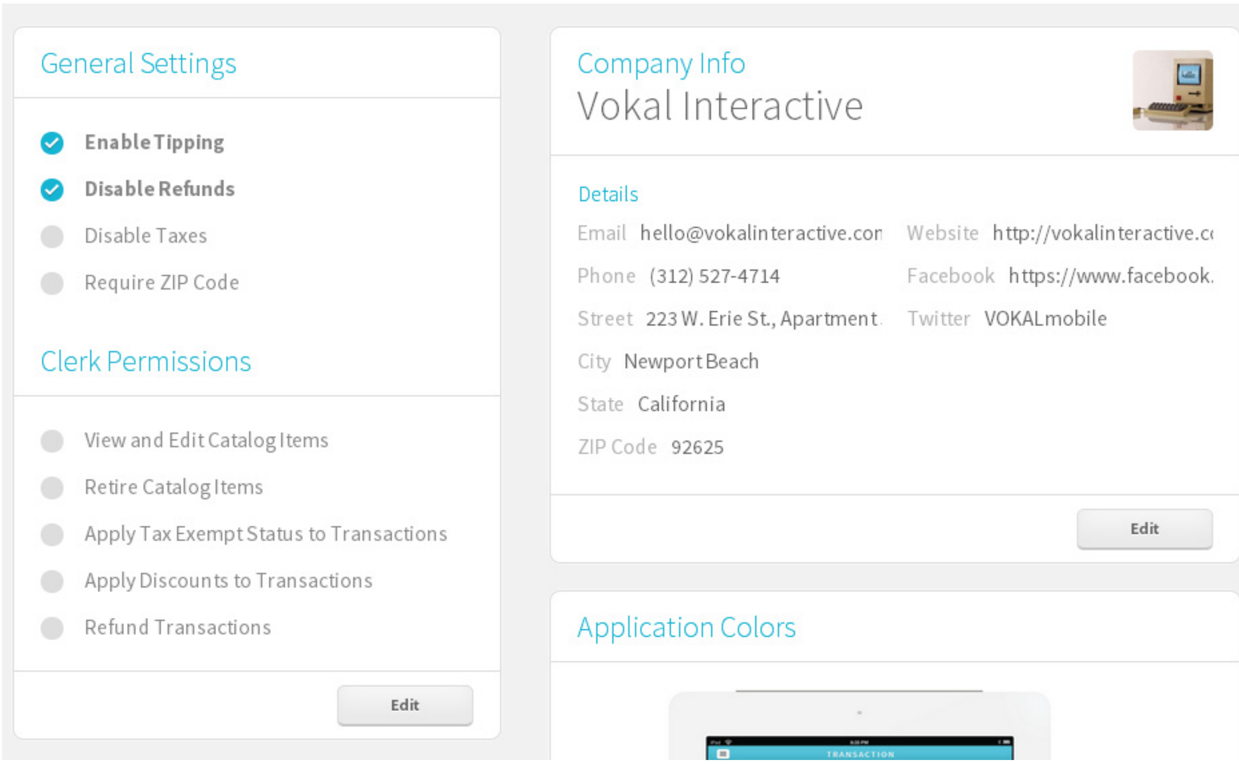
Settings

To access settings, select **Settings** from the **Manage** menu. The following screen displays:



General Settings and Clerk Permissions

To change the general settings and clerk permissions, click **Edit** beneath the options.

The following table describes the options under General Settings:

Setting	Description
Enable Tipping	Select to require a tip prompt to display during the payment flow.
Disable Refunds	Select to not allow refund transactions.
Disable Taxes	Select to not add tax amounts to transaction amounts. If Disable Taxes is selected, tax amounts do not display at all on the transaction screen.
Require ZIP Code	Select to require customer's enter a ZIP code during transactions.

Clerk permissions allow you to set rules for which actions clerk users can perform in QuickSwipe. Select any of these options to allow clerk users to perform the task:

- View and Edit Catalog Items

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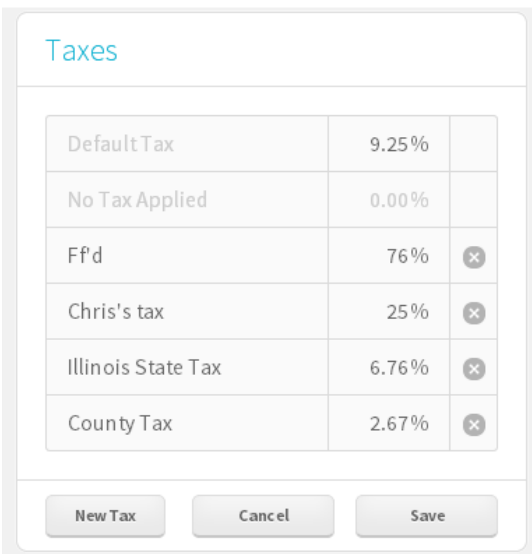
- Retire Catalog Items
- Apply Tax Exempt Status to Transactions
- Apply Discounts to Transactions
- Refund Transactions

Click **Save** to update general settings and clerk permissions.

Taxes

If taxes are enabled under General Settings, taxes will be added to transactions by default. Each item can have a single tax setting applied to it in the catalog. The default tax is applied to items without a tax setting.

To change the tax amounts, click **Edit** beneath the options. The Taxes options become editable:



To edit the percentage of a tax, edit the value to the right of the tax name.

To add a new tax, click **New Tax**. An empty row is added to the list. Enter a new name and tax amount.

Click to delete any custom taxes you have added.

Click **Save** to complete changes to the taxes.

Company Info

The Company Info section contains the contact information for your company. This information is included on receipts generated through QuickSwipe.

To edit your company info, click **Edit** beneath the options. Edit the desired contact fields. Email, Street, City, and ZIP Code are required.

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Click **Save** to complete changes to your company info.

Application Colors

The Application Colors section allows you to customize the color of the interface of the iOS app to match your company's color scheme.

Note: Application Colors only affects the colors of the iOS interface.

To edit the application colors, click **Edit** beneath the options. Select a new color by clicking on one of the colors in the palette that displays or by entering the hex code in the HEX field.

Click **Save** to complete changes to your application colors.

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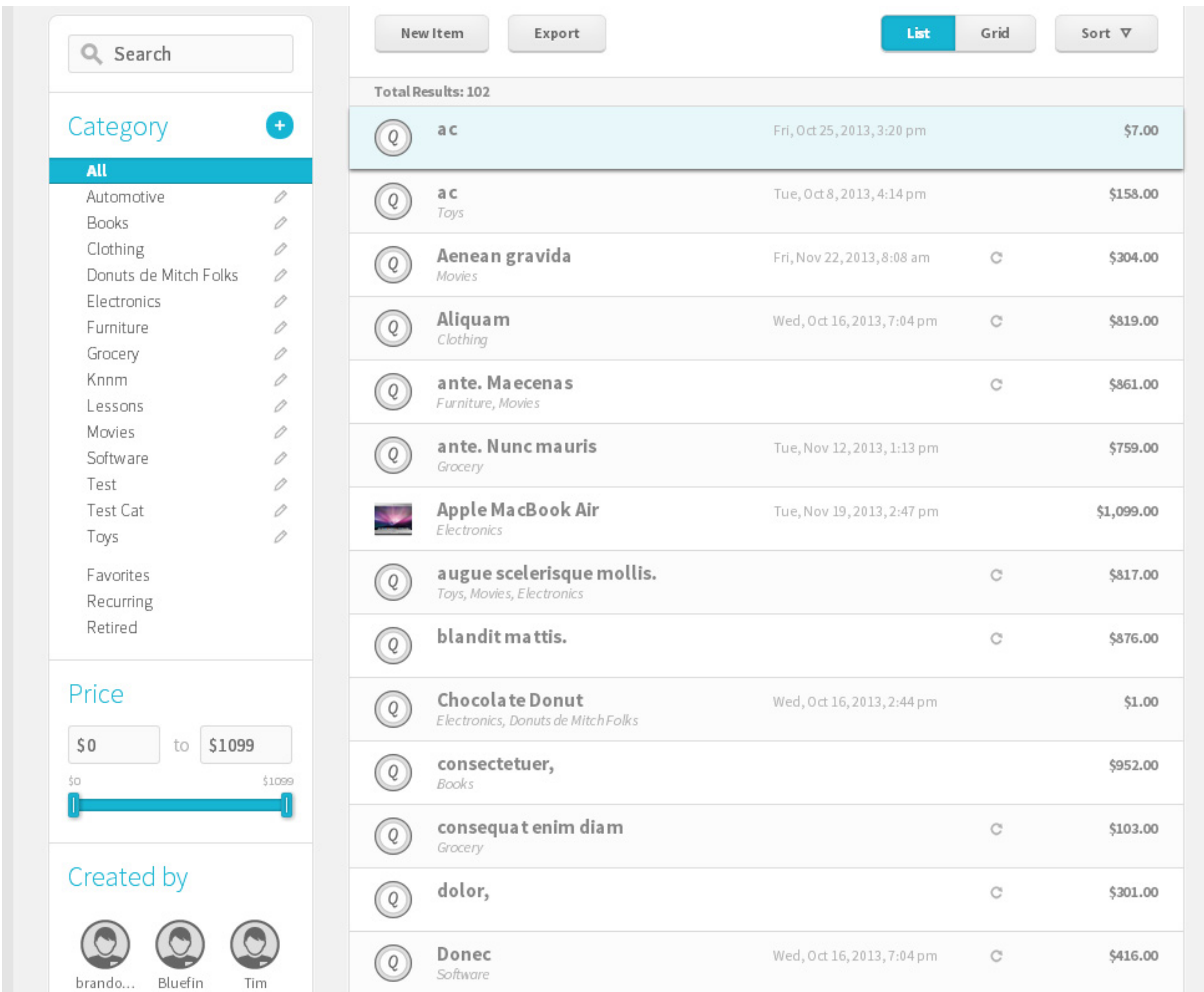
Catalog

The catalog is a list of pre-defined items that you can add to a ticket. Each item has properties and a price. Items are organized into categories to make them easier to find. Items can belong to more than one category.

View

To view the catalog, select **Catalog** from the main menu. The catalog displays:



Click an item to view that item. Click a category to view all items in that category.

Click **List** or **Grid** to change how the catalog items are displayed.

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Search and Filter

You can search the list of items for a specific term by entering that term in the Search field and pressing **Enter**.

You can filter the list of items displayed in the catalog using the filter list at the left of the catalog screen.

- Select a category to show only items in that category.
- Select **Favorites** to show only items marked as favorites.
- Select **Recurring** to show only recurring sale items.
- Select **Retired** to show only items that have been retired from the catalog and are no longer available for sale.
- Enter a minimum and/or maximum price to show items that fall within a price range.
- Select a user to show only items created by that user.

Sort

You can sort the items by name, price, or date created. To sort, select the desired option under the sort menu.

Categories

Use categories to organize items in the catalog. Items can belong to more than one category.

- Adding Categories
- Editing Categories
- Deleting Categories

Adding Categories

To add a category, follow these steps:

1. From the catalog list, click **+** next to the Category label.

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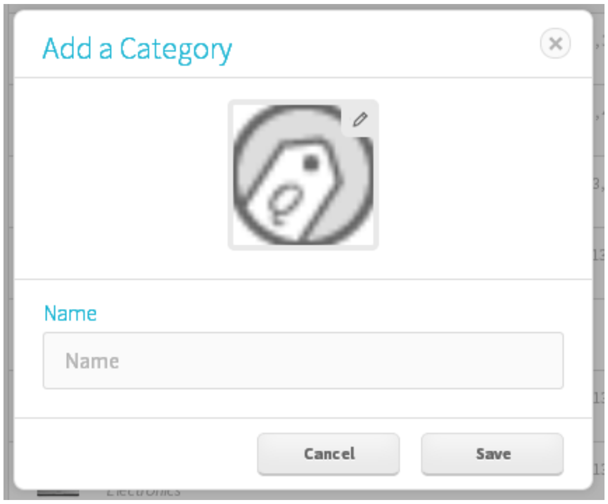
The following screen displays:



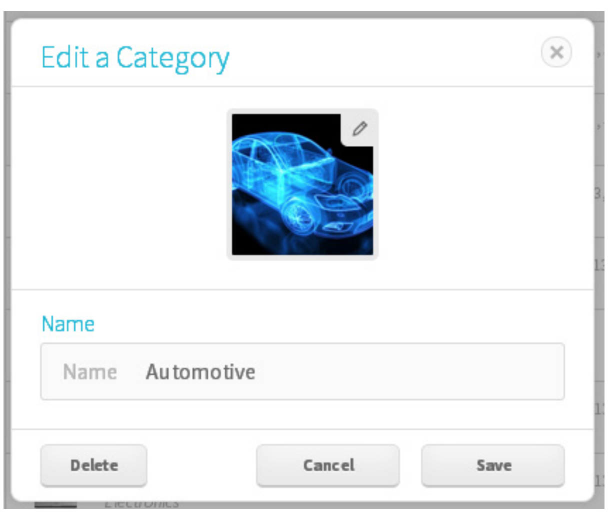
2. Click the icon and select an image to set an image for the category.
3. Enter the name for the category in the Name field.
4. Click **Save**.

Editing Categories

To edit a category, follow these steps:

1. From the catalog list, click  next to the Category you want to edit.

   The following screen displays:



2. Click the icon and select an image to set an image for the category.
3. Enter the name for the category in the Name field.

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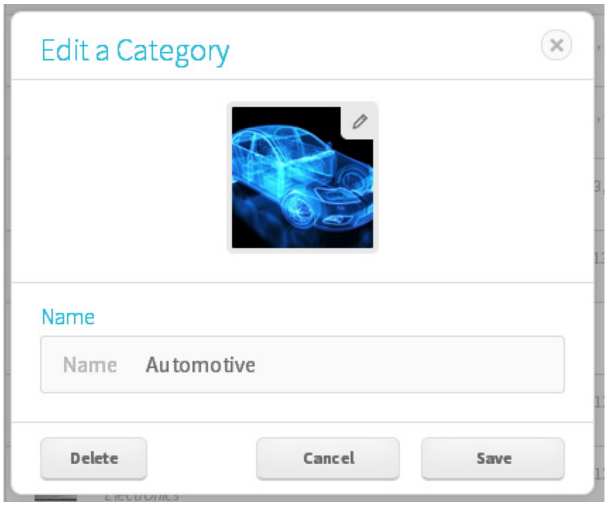
4. Click **Save**.

Deleting Categories

To delete a category, follow these steps:

1. From the catalog list, click next to the Category you want to edit.

   The following screen displays:

2. Click **Delete**.

   A confirmation message displays.

3. Click **Okay**.

Items

Items are anything that can be added to a ticket for a customer to pay for. Use this feature to set up the properties of the item, such as price, image, and recurring status.

- Adding Items
- Editing Items
- Retiring Items

Adding Items

To add a new item, follow these steps:

1. From the catalog list, click **New Item**.

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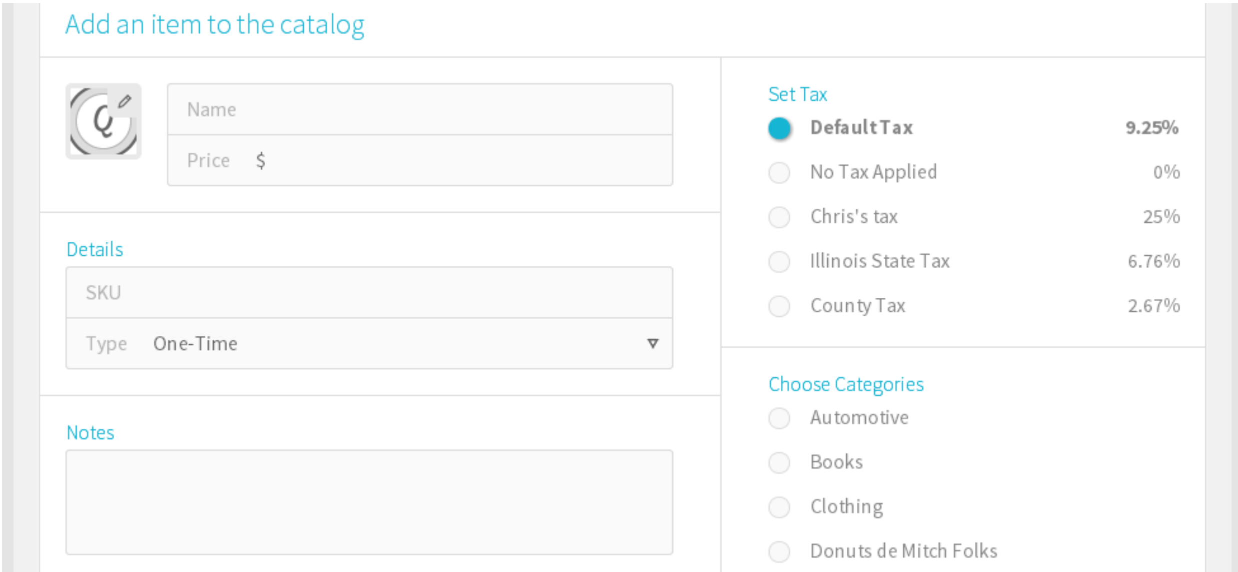
The following screen displays:



2. Click the icon and select an image to set an image for the item.
3. Use the following table to complete the fields on this screen:

Field	Description
Name	Required. Enter the name of the item to display in the catalog and on tickets.
Price	Required. Enter the price of the item.
SKU	Required. Enter the SKU (stock keeping unit) that identifies the item. If you do not use SKUs for your business, simply enter a random character to complete this field.
Type	Select whether the item is a one-time purchase item or a recurring item. One-time purchase items are billed only once at the time of sale. Recurring items are billed at an interval that you set. If you select Recurring, the following screen displays:

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Field	Description
	 Complete the details of the recurring payment to determine when the payment will be billed.
Notes	Add any additional details about the item that will display in the catalog.
Set Tax	Select the tax that applies to the item. Only one tax can be applied to an item.
Choose Categories	Select any categories that the item will be displayed under in the catalog. An item can belong to zero or more categories.

4. Click **Save** to add the item.

Editing Items

To edit an item, follow these steps:

1. From the catalog list, click the item you want to edit.

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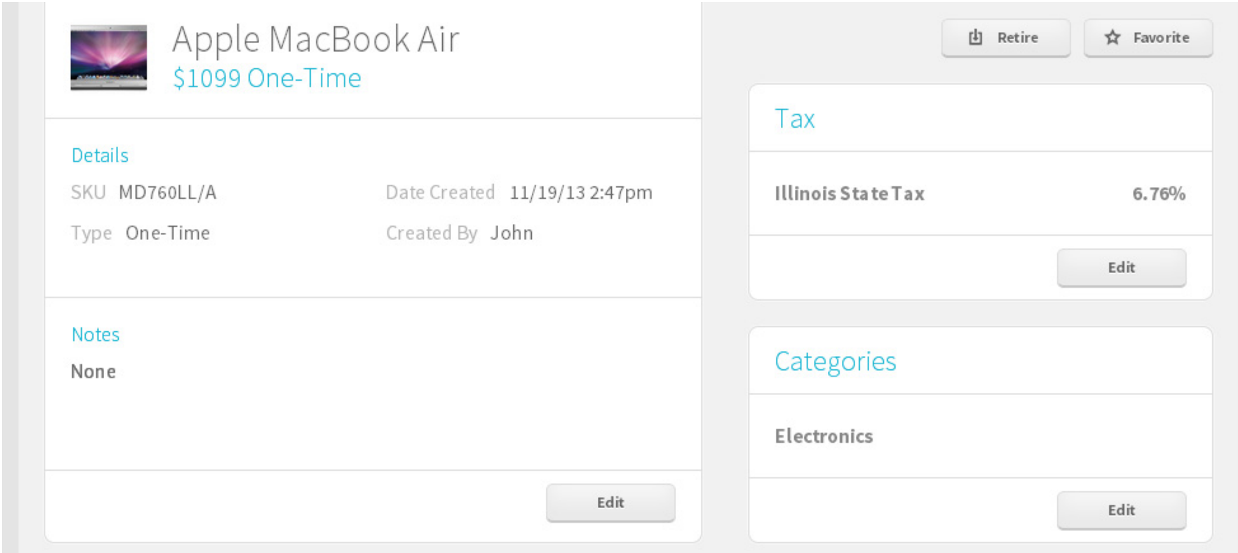
The following screen displays:



2. Click **Favorite** to mark the item as a favorite for catalog searches.
3. To edit the item details, click **Edit** below that section.

   Use the following table to complete the item details:

Field	Description
Name	Required. Enter the name of the item to display in the catalog and on tickets.
Price	Required. Enter the price of the item.
SKU	Required. Enter the SKU (stock keeping unit) that identifies the item. If you do not use SKUs for your business, simply enter a random character to complete this field.
Type	Select whether the item is a one-time purchase item or a recurring item. One-time purchase items are billed only once at the time of sale. Recurring items are billed at an interval that you set. If you select Recurring, the following screen displays:

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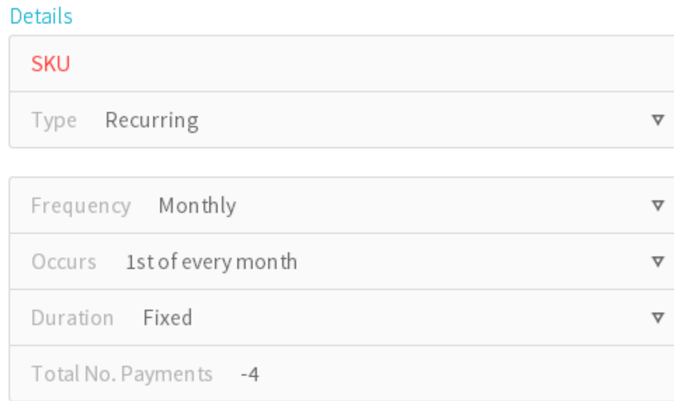
Field	Description
	 Complete the details of the recurring payment to determine when the payment will be billed.
Notes	Add any additional details about the item that will display in the catalog.

4. To edit the tax for the item, click **Edit** below that section.

   Select the tax that applies to the item. Only one tax can be applied to an item. Click **Save** to complete the edit.

5. To edit the categories for the item, click **Edit** below that section.

   Select any categories that the item will be displayed under in the catalog. An item can belong to zero or more categories. Click **Save** to complete the edit.

Retiring Items

When you want to remove an item from the catalog, you retire the item. The item is no longer available to be added to tickets; however, it remains in QuickSwipe for reporting on previous sales.

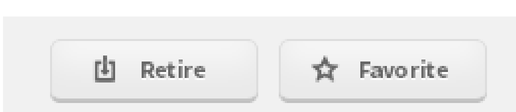
> **Note:** Depending on settings, clerks may not have permission to retire items.

To retire an item, follow these steps:

1. From the catalog list, click the item you want to retire.

   The item details screen displays.

2. Click **Retire** to retire the item.



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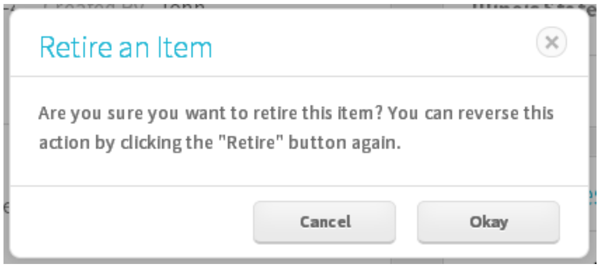
The following warning displays:



3. Click **Okay** to retire the item.

   You can return the item to the catalog by clicking **Retire** again at any time.

Export

To export the list of catalog items as a comma separated values (CSV) file, click **Export**.

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Transactions

With either the iOS app or the web application, you can:

- View your transaction history
- Perform refunds
- Cancel recurring transactions
- Email receipts

Note: Credit, check, cash, and recurring sale transaction can only be performed using the iOS app.

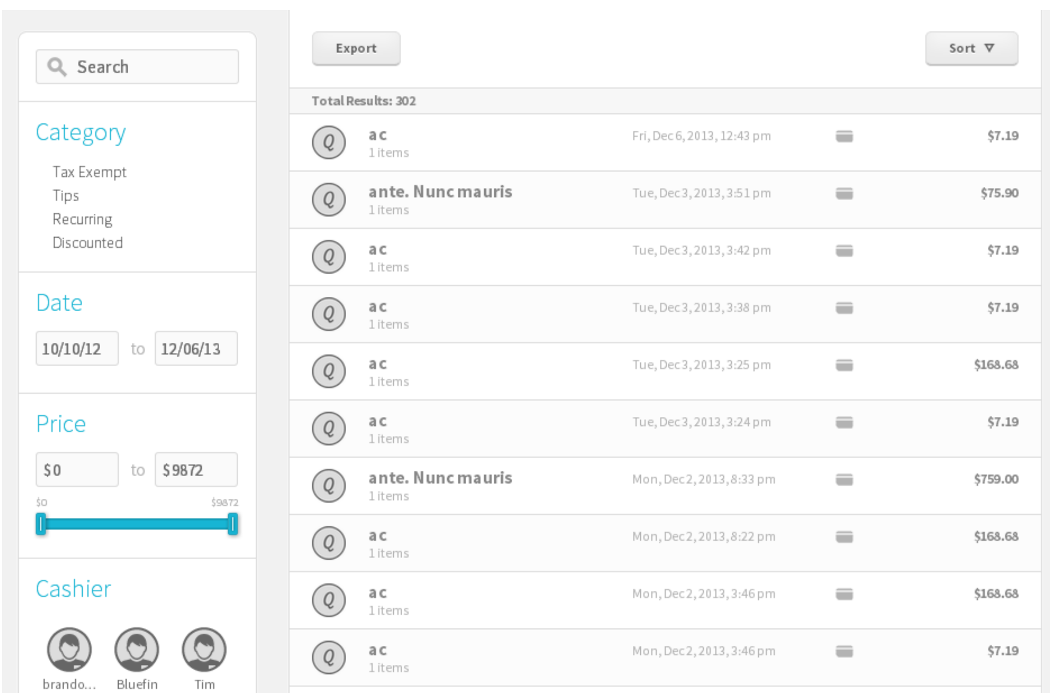
Transaction History

The transaction history screen shows you all of your past transactions and allows to you to perform refunds, email receipts, and cancel recurring transactions.

View

From the main menu, select **Transactions**.

The Transaction History displays:



Click any transaction in the list to view transaction details.

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Search and Filter

You can search the list of transactions for a specific term by entering that term in the Search field and pressing **Enter**.

You can filter the list of transactions using the filter list at the left of the transaction history.

- Select **Tax Exempt** to show only transactions to tax exempt customers.
- Select **Tips** to show only transactions that include a tip.
- Select **Discounted** to show only transactions with a discount applied.
- Select **Recurring** to show only recurring transactions.
- Enter a minimum and/or maximum amount to show transactions that fall within a range.
- Select a user to show only transactions by that user.

Sort

You can sort the items by date, payment type, total items, or price. To sort, select the desired option under the sort menu.

Cancel a Recurring Sale

To cancel a recurring sale transaction, follow these steps:

1. From the main menu, select **Transactions**.

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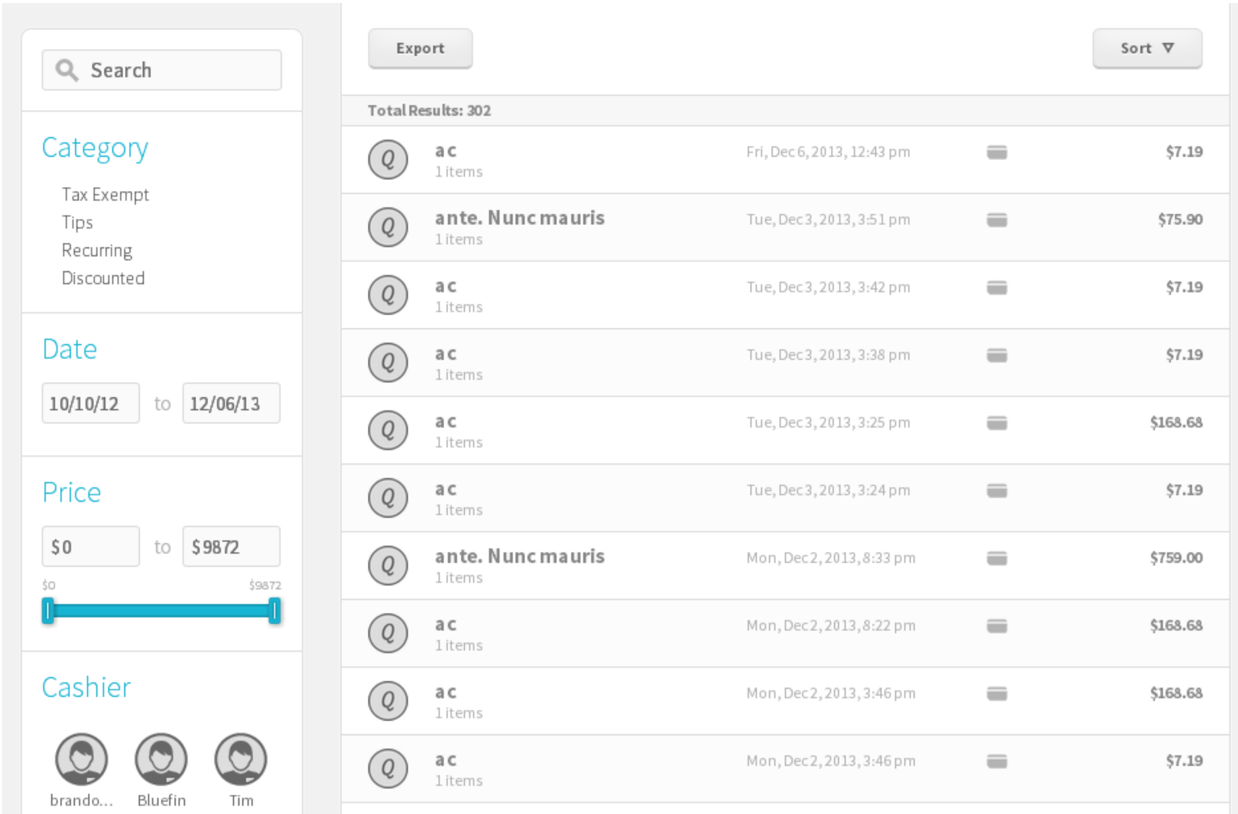
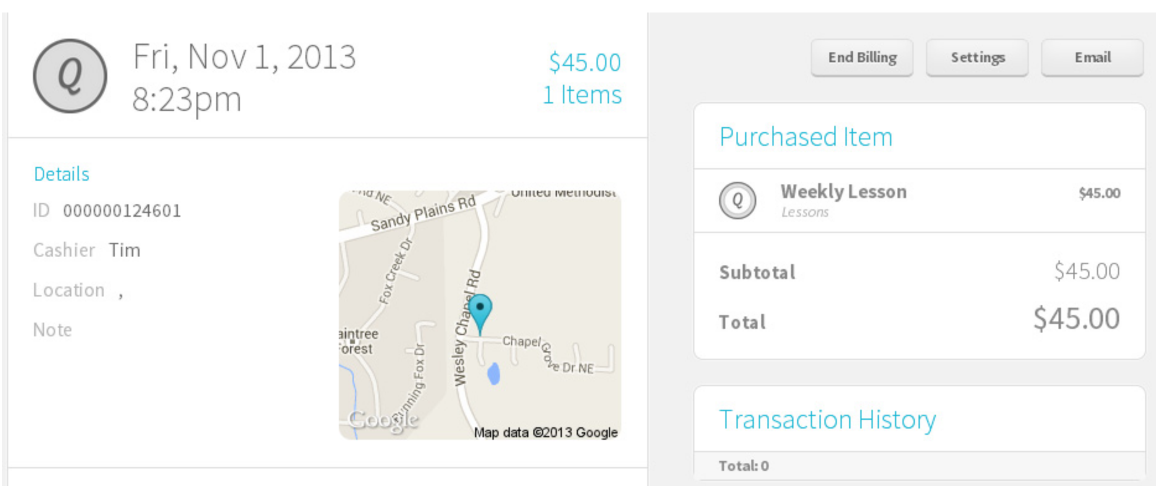
The Transaction History displays:



2. Click the transaction in the list to cancel. Recurring sale transactions display with a  icon. See Transaction History for instructions on filtering the list.

The transaction details display:



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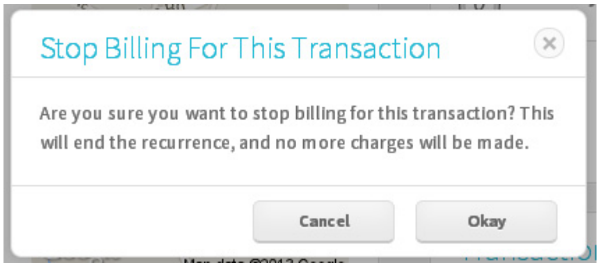
3. Click **End Billing**.

   The following message displays:



4. Click **Okay**.

   All future transactions for this item are canceled.

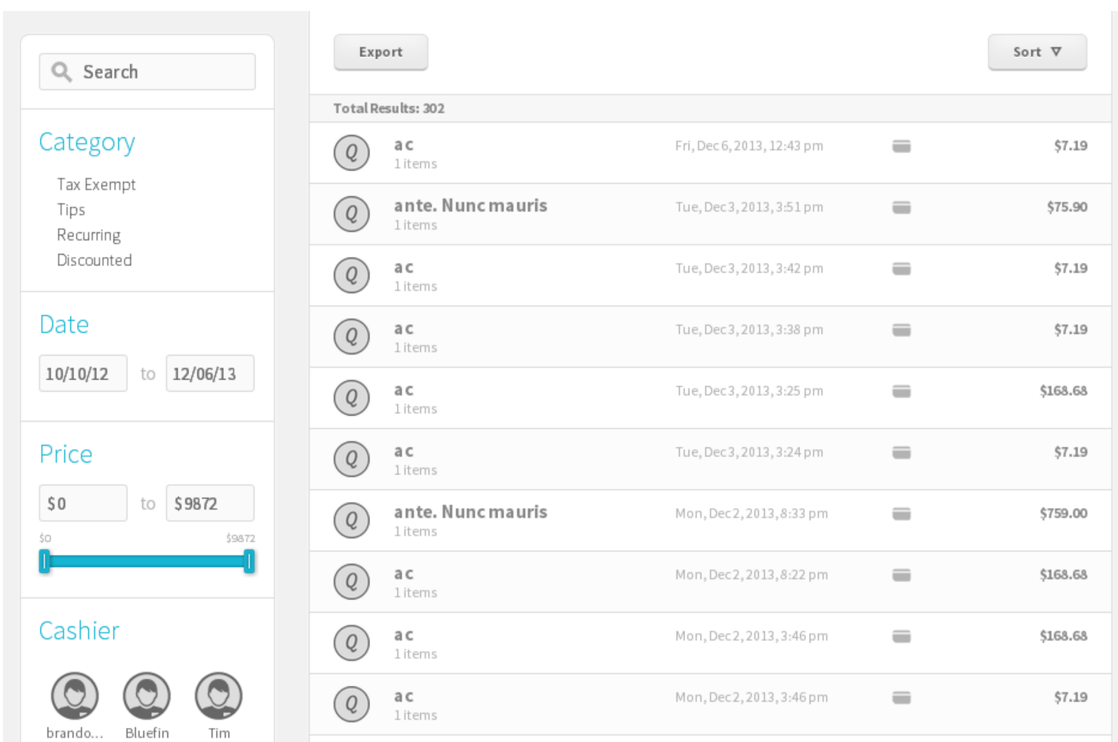
Refund

Note: A transaction can only be refunded once.

To refund a transaction, follow these steps:

1. From the main menu, select **Transactions**.

   The Transaction History displays:



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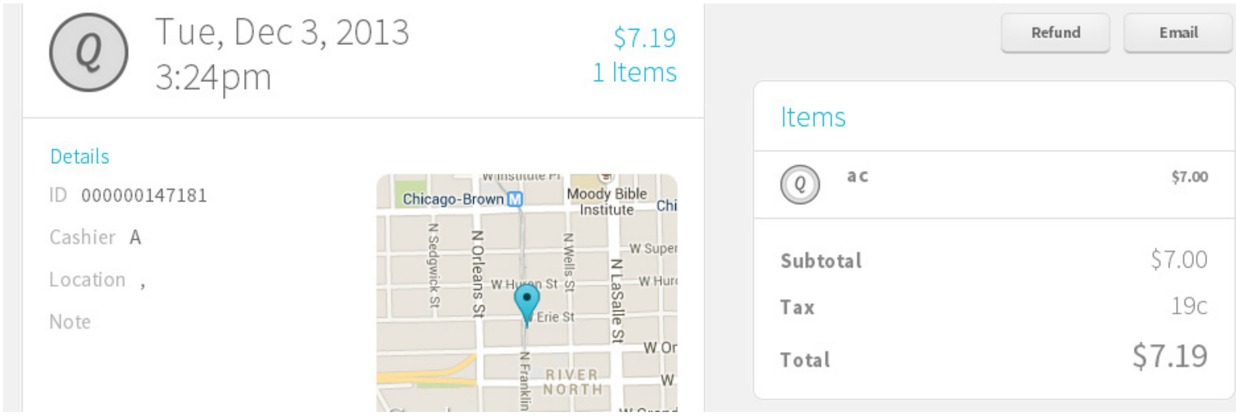
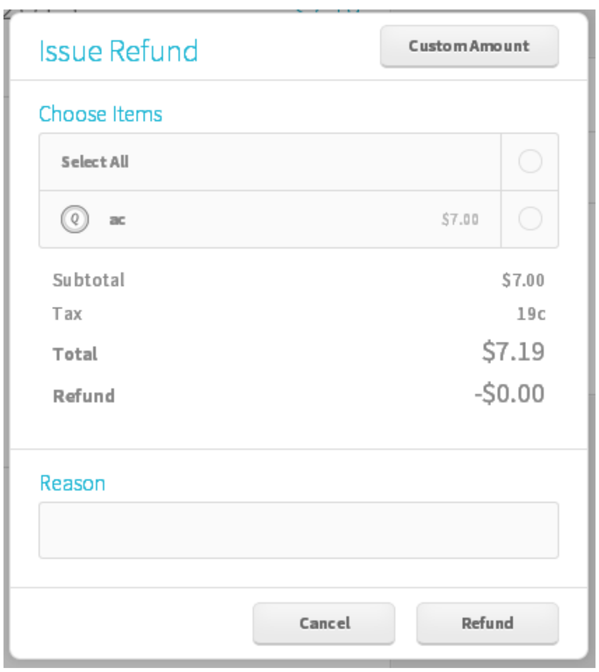
2. Click the transaction in the list to refund. See Transaction History for instructions on filtering the list.

   The transaction details display:



3. Click **Refund**.

   The refund screen displays:



4. Select the items from the ticket to refund or click **Select All** to refund all items.

   To enter a refund for a different amount, click **Custom Amount**.

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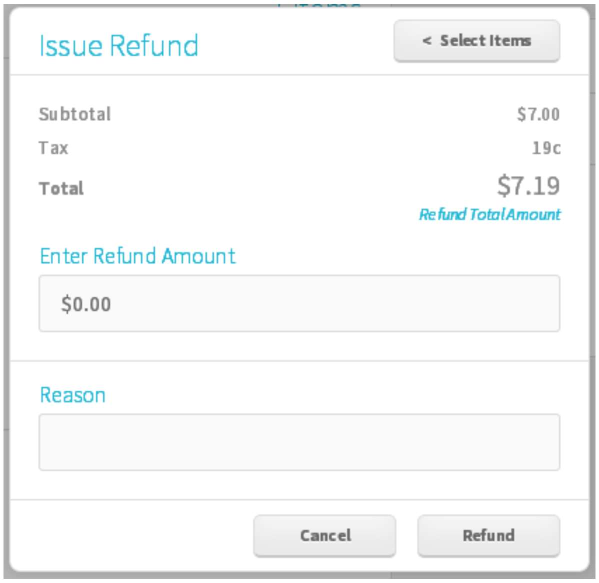
The following screen displays:



Enter the custom amount in the Enter Refund Amount field.

5. Enter an optional reason for the refund.
6. Click **Refund** to complete the refund.

Email Receipt

To email the receipt for a transaction, follow these steps:

1. From the main menu, select **Transactions**.

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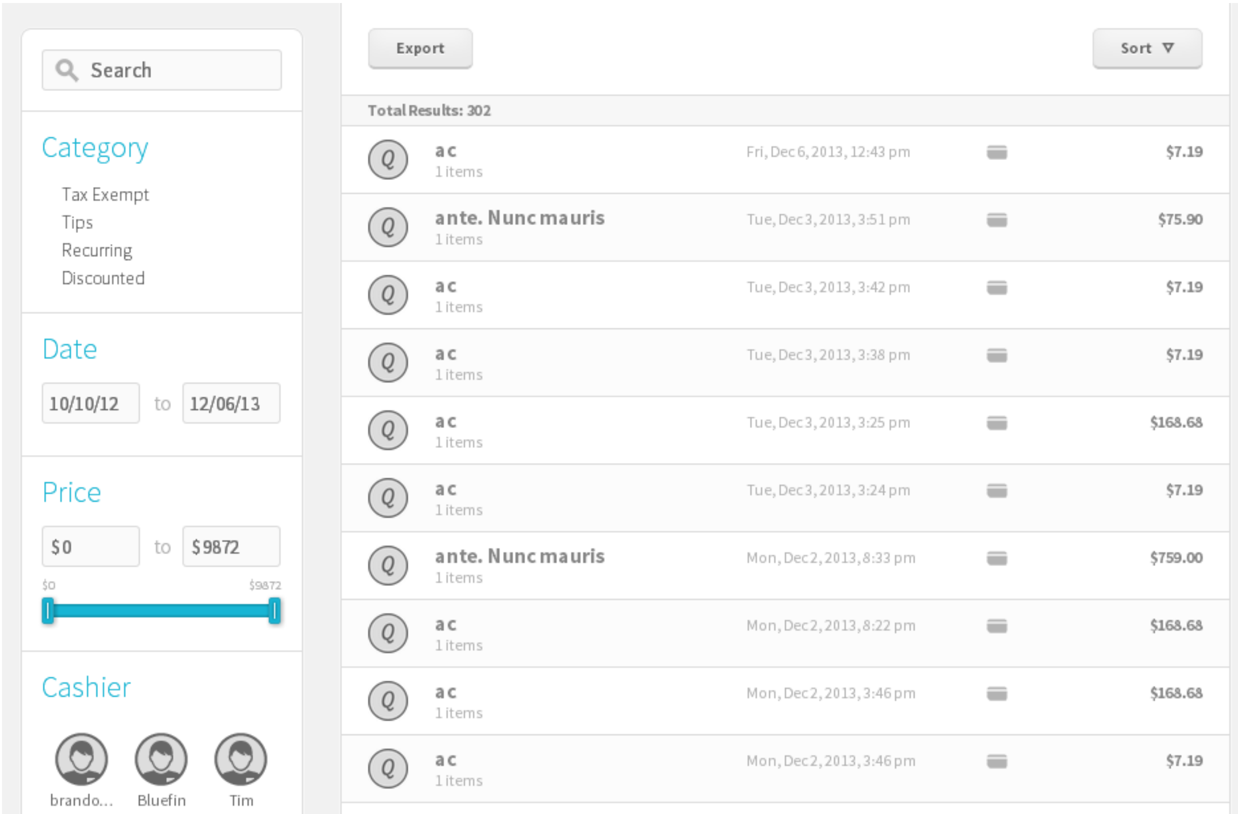
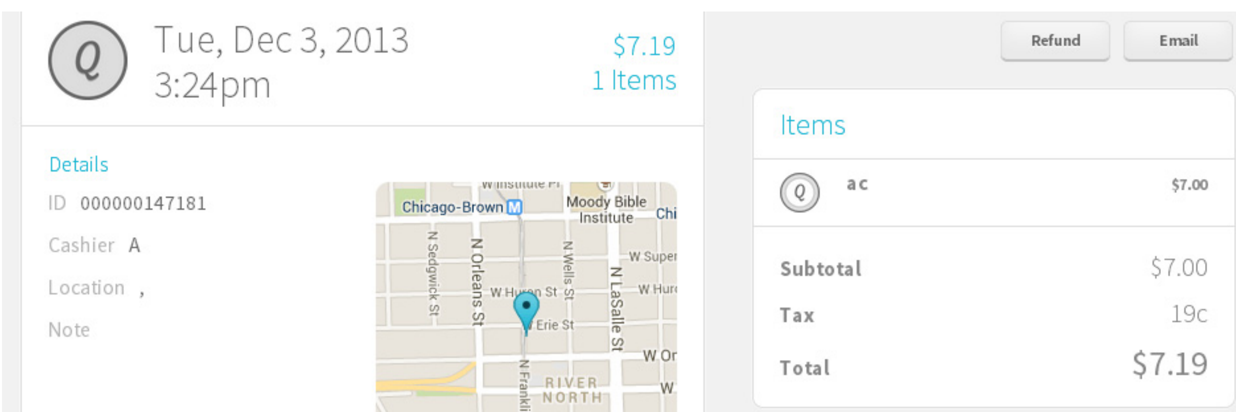
The Transaction History displays:



2. Click the transaction in the list whose receipt you want to email. See Transaction History for instructions on filtering the list.

   The transaction details display:



3. Click **Email**.

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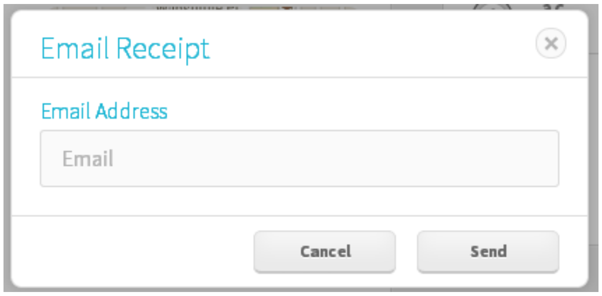
The Send Receipt screen displays:



4. Enter the customer's email in the Email Address field.

   Click **Send** to email the receipt.

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