Requirements

• Merchant On The Move requires Android 2.01
• To swipe credit cards and to print receipts the Bluetooth Merchant on the Go is required.

Installation

In order to use Merchant On The Move, you must install the software on to your Android phone.

To install Merchant On The Move from the Android Market place...

1. Click on the Market icon
2. Tap in the search box
3. Type Merchant On The Move
4. Select Merchant On The Move from the list and download
5. Follow the installation prompts to install the software

Once the installation is complete you can open the software immediately or go back to the application window and launch Merchant On The Move by tapping on its icon.

To uninstall Merchant On The Move...

1. Press the Menu button and select Settings
2. Choose Applications > Manage applications
3. Select Merchant On The Move
4. Tap on Uninstall
Uninstalling the application will also remove all your sales history and application settings. Any sales that you have already processed can be accessed from your online merchant gateway. Any pending transactions that have not been submitted will be lost.

First Time Set Up

In this section it is assumed that you are starting the software for the first time.
If you have already installed the software and have successfully entered your merchant account information, you can simply log on and start processing sales. See the tutorials later on for performing keyed ad swiped credit card transactions.

First time setup involves four stages
• Entering your merchant account
• Activating your software
• Modifying your account settings
• Optionally setting up your Bluetooth Merchant on the Go

1. Locate the Merchant On The Move icon and tap on it
2. Enter your Merchant ID (MID) and Password (PWD) on the Merchant Account Logon screen

The MID and PWD are the same as your online merchant logon information. The password must be in uppercase (if you did not make your password to uppercase when setting up your online account, you must do so before trying to setup your account inside Merchant On The Move).

In this example MID 10600 and PWD 1234 are used for a company called MAC Tools. If you have not yet received your merchant account information, you can use the Planet Wireless Demo account (MID: 16581 PWD: 1234) to follow along with the tutorials in this guide. Planet Wireless Demo account can be used with your own credit card and will not process any sales through the your gateway.

3. Tap on the Logon button

Once your account has been verified, the DBA (Doing Business As) name and work address associated with your account is transferred to your device. For information on how to change this information see the Settings and Tips and Pointers sections. At this stage, you will need to perform a one-time activation of your software in order to use your merchant account.
4. Enter your 16 digit activation code

The activation code is provided by your merchant provider. This is a 16 digit code that you must enter before you can start using your merchant account on the device. The Planet Wireless test account (16581) does not require software activation.

5. Review your settings

Once the software is activated, you will be taken to the settings screen where you can modify some options. Information regarding each of the settings can be found in the Settings section. If you would like to make changes, please review each section, particularly the name of your company. If your company name (DBA) is not correct, you will need to notify your merchant provider and issue a change notification. To update your DBA name on the device, see the Tips and Pointers section.

If you want to follow along with the same information used in this guide, set the sales tax rate to either 8.25% and use the test account 16581 (PLANET WIRELESS DEMO). Keep the Always Add Sales Tax option unchecked.

6. Tap the back button on your device

As with most Android applications, the back button will close the virtual keyboard, close dialog boxes, or return you to the previous screen.
In this case, the back button will exit the Settings screen and bring you to the Main Menu (see the Main Menu section for details). Tapping the back button a second time will exit the program.

7. Tap the back button a second time to exit the program

Your first time setup is complete. From now on, each time you start Merchant On The Move you will be asked to log on before going to the Main Menu.

At this point, if you have purchased and received the Bluetooth Merchant on the Go, go to the section Bluetooth Setup for pairing and setting up your 2-track card reader and receipt printer.

Logging on to Merchant On The Move

Each time you start Merchant On The Move, you are presented with the Merchant Account Logon screen. The most recent account accessed will appear in the MID field. If you have used more than one account the drop down arrow will display a list of validated merchant accounts. You can use this list to switch between merchant accounts. If the Save Password option is checked on in the settings screen, then the password field will also be populated.
If you leave the Save Password feature on (by default) it is recommended that you invest into a software utility that can lock your screen so that if you lose your device, it cannot be accessed by others. In addition, each merchant account has its own unique settings that can be modified from the Settings screen (i.e., Rep ID, header and footer for printed receipts). These are known as local settings (see the Settings section for details).

**Main Menu**

After logging on to your account the Main Menu allows you to process sales, issue returns from the Sales History, and perform other tasks available from the popup menu.

- **New Logon** - for returning to the Merchant Account Logon screen
- **Update DBA** - for updating your DBA name after changes have been made with your merchant provider
- **About** - for displaying the software about box
- **Settings** - for modifying your global and current merchant account settings
- **Delete Sales** - for deleting all sales for the current merchant account
- **Wipe Data** - for removing all data (i.e., giving the phone to someone else)

**Keyed Transactions**

This tutorial will take you through the process of entering your first credit card sale. You can follow along using your merchant account or the test account. If you are using your merchant account, we recommend that you issue a refund for all sales that have received an approval. You cannot issue refunds on the test account.
**Printing Receipts** - This tutorial will take you through printing a sales receipt, if you have not already done so, see the section Bluetooth Setup for pairing and setting up the Bluetooth Merchant on the Go.

**INV Number** - Merchant On The Move automatically generates the invoice number for you. If you would like to change the invoice number (reference), simply tap on it to open the edit box. Up to 20 characters can be added as a reference or invoice number that will be displayed within your online account.

1. Start Merchant On The Move
2. Log into your account or the test account
3. Tap on Credit Card Sale

The Credit Card sales screen is divided into four sections

- **Card** - where you enter credit card information
- **Customer** - where you enter optional billing address information
- **Sale Info** - where you enter the amount of the sale
- **Summary** - where your review the sale, enter a signature and process the sale

4. Tap on the Name field

   The name field will highlight and the virtual keyboard will appear. If you are in landscape mode you can also use the hardware keyboard (if available on your device).

5. Enter the card holder name and card information
If you are using the test account (16581) you can enter the card information below. Otherwise, enter your name and card information. As you enter the card number, it is automatically validated and properly formatted. The card type will also appear for your convenience. If the card number turns red if it is an invalid number.

Name: PETE PETERSON  
Card: 4111 1111 1111 1111  
Exp: 3/18

7. Tap on the keyboard Next button

After entering the information for each line, click on the Next button. The Next button will move you to the next line. It will also move you to the next tab should you be at the last item on the screen. To hide the keyboard, tap on the device's back button.

6. On the customer screen enter the billing address

This you are using your account, Enter the billing address of your credit card or, if using the test account, enter the information below.

Address: 123 MAIN ST NEW YORK NY  
Zip Code: 10001
Billing information is optional and will not be displayed on the printed receipt. However, if your merchant account is setup for AVS (Address verification), entering the information in these fields for a keyed transaction may reduce your merchant processing fees and aid in contesting any chargebacks.

7. Tap on the keyboard's Next button

This will bring you to the Sales Info screen where you can enter the amount of the sale.

8. Enter 24.95

If you are using your own account, you can enter $1. The total amount must be at least $1.00 in order for the merchant gateway to process the transaction.

9. Tap on 'Tap here to add tax'

If you added a tax rate on the Setting screen, but kept the Always Add Sales Tax feature checked off, then the 'Tap' message will appear under the amount. Tapping in this area will automatically add the tax based on the value in the amount field. Printed receipts will also display the tax information, if present.
10. Tap the keyboard's Next button

Focus is shifted to the Tip/Fee field. This is where you could enter a tip amount. However, we will leave this empty for now.

11. Tap on the device's menu button

This will display the menu popup where you can see a number of options.

If you will be requesting a tip or fee for a service, you could tap on the Service Receipt button.

If the Merchant on the Go is attached you will be able to print a service receipt where the customer can enter the tip amount. Typically they would also sign this receipt and give it back to you, You would then keep this receipt and enter the tip amount into the Tip/Fee field.

12. Go to the Summary screen

Do this by either tapping on the Summary tab or the keyboard's Next button.

The summary screen allows you to quickly review important information before charging the sale. At the bottom of the screen it will also indicate that the sale is a Key or Keyed Transaction. If the sale involved swiping a credit card, then this would display as a Swiped Transaction (see the next section on performing a swiped transaction). It is also where you can request the customer's electronic signature.
The electronic signature is different from the Service Receipt signature. The Service Receipt signature is for you to file with your business and sales papers. Should there be questions about the amount that was changed or the customer contests the amount entered for the tip, you will have this information readily available.

The electronic signature is sent to your merchant gateway and stored on the server.

Should you require proof that the customer authorized the sale, you can log into your online gateway and print the processed receipt (with signature) from your browser (note: depending on the merchant gateway you are using - you may need to use the Internet Explorer Web browser to view the signature). To make use of server-side signature storage, this feature must be set to on under the Settings (see the Settings section for details).

13. Tap on the 'Tap here to enter signature'

Turn the device sideways and pass it to the customer. Ask the customer to enter their signature, then tap on the OK button. The signature will now appear on the Summary screen.

14. Tap the Charge button

A secure internet connection will be established and the sale will be processed. Once the sale is approved, an Approval Screen will appear and the signature will change to a different color, indicating that it can no longer be changed.
15. Tap the device's menu button

The popup menu button will appear, where you can now print a final receipt with the transaction ID and authorization codes returned from the merchant gateway. If you have set Auto Print Approved Sales to on from the Settings, then a receipt will automatically be printed once the sale is approved.

If the Merchant on the Go is off at this point, then the No available devices error message will appear.

At this point you can turn on the Merchant on the Go, tap OK to dismiss the error message and press the Receipt button from the pop menu.

You have just completed your first Keyed Transaction.

**Swiped Transactions**

By using the Bluetooth Merchant on the Go you can use Merchant On The Move to perform swiped transactions that give you the best processing rates. Swiped transactions are fast and secure. Address verification is not required and you do not have to spend time manually entering the credit card information.
Furthermore, unlike other software products, Merchant On The Move has been streamlined for you to quickly process swiped credit card transactions by using the fewest keystrokes possible. It all comes down to a three step process...

1. Select Credit Card Sale and tap Swipe Card

![Images of the Merchant On The Move app interface]

2. Swipe the Card and enter the amount
3. Process the sale and print the receipt

The next few steps will take you through the details of the process. You can use your own account or the Planet Wireless Demo account (16581). In this example, account 10600 is used with a credit card from Nadine Murphy.

1. Start Merchant On The Move
2. Log into your account or the test account
3. Tap on Credit Card Sale
4. Turn on the Merchant on the Go

5. Tap the Swipe Card button

If you have more than one Bluetooth device near your
phone or if you have not yet selected the Merchant on the Go, the Select Device window appears. If it does, tap on the correct device (the Merchant on the Go will start with MSP), then tap the OK button. At this point the Swipe Card screen will appear.

6. Swipe a credit card

On a successful swipe, the Sales Info tab will then be highlighted with focus placed on the Amount field.

7. Enter $24.95

8. Tap in the Tax area to add the tax

9. Tab the Keyboard's Enter key twice

You will now be on the Summary screen where you can review the information, add a signature, or print a service receipt from the popup menu.

See the Keyed Transactions tutorial above for details.

10. Tap in the signature area and have the customer sign

11. Tap the Charge button
The sales information is sent to the server and the credit card is processed. Upon a successful transaction, the Approval screen will appear. If the auto-print feature was set on under the program settings, then the sales receipt will autonomically print once the sale is approved. Optionally you can print a receipt from the popup menu.

Congratulations, you have just completed your first swiped credit card sales. If you are using your own personal card on your merchant account, don't forget to issue yourself a refund (see Issuing Returns for details).

Some points about Swiped Credit Card Sales
• The Customer information is omitted since AVS is not required when a card is present. You can optionally enter this information, however.

• Successfully swiped credit cards will automatically go to the Sales Info screen.

• If you modify the card holder's name or card information after swiping a credit card, the transaction indicator at the bottom of the screen will go from Swiped Transaction to Keyed Transaction.

• You will be notified if the card has expired.

• When swiping the card, you should hear a single beep from the Merchant on the Go. If you hear a double or multiple beeps, the card was not read correctly. Trying re-swiping the card. If the card still cannot be read, try swiping in the opposite direction or try cleaning the card's magnetic strip. Your merchant provider may also have supplies for cleaning the magnetic head of the Merchant on the Go.

• If you are unable to process the sale (i.e., no data connection in a rural area) and you save the swiped sale for later processing, it will automatically down qualify to a keyed transaction. At this point you may also wish to enter the billing address for card.

Cash Sales

When coupling Merchant On The Move with the Bluetooth Merchant on the Go, you have the ability to print cash receipts. A simple cash receipt will only have the total
amount of the sale. Detailed cash receipts can display the tax and tip amounts. Service receipts can also be printed from the popup menu.

**To print a simple receipt where the customer enters a tip...**

1. From the Main menu tap on Cash Sale  
2. In the General tab enter an amount  
3. Tap on the device's menu button to display the popup menu  
4. Tap the Service Receipt button

**To print a detailed receipt where the tax and tip are placed on the receipt...**

1. From the Main menu tap on Cash Sale  
2. Tap on the Detailed tab  
3. Enter an amount (i.e., $52.00)  
4. Optionally, tap on the Tax area to add or remove the sales tax  
5. Enter a Tip/Fee of $10.00  
6. Tap on the Print button

**Some points about Detailed Cash Sales**

A service receipt can be printed by selecting Service Receipt from the popup menu. However, this button item will be disabled if an amount is already entered in the Tip/Fee field. The settings screen has an option called Show Tip Suggestions. When this is on, tip suggestions appear on service receipts.

**Sales History**

Each time you process a sale, it gets stored into the Sales History. If you are in a "bad reception" area, you can save the sale and process later. Once reception is restored, go to the sales history and tap on the Pending tab. Select you pending sale from the list charge the sale.

**To get to the Sales History...**

1. Start Merchant On The Move  
2. Log into your account or the test account  
3. Tap on Sales History  
4. Tap on the respective tab to view all, approved, or pending sales

*Hint: If you have a large number of items in the list, open the menu popup and select the Recent Sales or Oldest Sales buttons to immediately go to the beginning or end of the list.*
Maintenance Tip:

When a sale is approved, the sales information is stored in your online merchant account. Approved sales stored on the device offer you a convenient method to review previous sales or to issue returns. For most merchant accounts, the maximum time allowed to issue a refund for an approved sale is 90 days. If you have approved sales that are older than 90 days, it is recommended that you delete them from your device. Some merchants prefer to keep some of their larger sales and best clients readily available for review, however, if you are past the 90 day limit and no longer need to review the sale on your device, you can delete it by tapping on the sale and then using the delete button from the popup menu.

To delete an approved sale...

1. Select an item from the list
2. Tap the device's menu button
3. Select the Delete Sale button

To delete a pending sale...

1. Select an item from the list
2. Make sure your are on the Summary screen
3. Tap the device's menu button
4. Select the Delete Sale button

Note:

_The delete button is only available on the Summary screen when coming from the Sales History screen._

Issuing Refunds

Refunds can be issued for approved sales. Depending on your merchant account, refunds can be issued up to 90 after the sale has been approved. There are two types of refunds; voids and credits.

Voids are issued before the sale has been settled. Credits are issued after the sale has been settled. Once a sale has been settled, you can issue a partial credit to the customer by logging into your online merchant account. In addition, you can issue a number of partial credits for the same sale as long as the total amount does not exceed the total sale amount. Should you require this type of credit refund transaction for a sale, please use your online service. With Merchant On The Move you can only issue full refunds as a void or full credit. Furthermore, should you issue a void or credit using
your online service, we recommend that you delete the sale from your sales history on the device. Trying to issue a refund on a sales item that was already taken care of online will display a notification error, suggesting for you to delete the sale. Sales items that are issued a refund in Merchant On The Move are automatically removed from the sales history list.

To issue a refund...

1. Start Merchant On The Move
2. Log into your account or the test account
3. Tap on Sales History
4. Tap on the All or Approved tab
5. Select the approved item to refund from the list
   
   In this example we have a single approved sale from a previous tutorial by Pete Peterson for $27.01.

6. Tap on the Issue Full Refund button
   
   A connection to the gateway will be established and validate the sale. After validation, it will check its status and see if a refund can be issued, issue the refund, and display a message indicating whether a void or credit was issued.

7. Tap on OK to dismiss the message
   
   You are then brought back to the Sales History screen and the item you selected is removed from the list. Should you wish to review the refund, log into your online merchant account.
Settings
The Settings screen has a number of options that let you fine-tune your software. Some of the options are global (work with all merchant accounts), while others are local (are specific to the current merchant account). A description of each option is shown below.

Account Information

**MID** - (Local) This is the merchant ID for the current account that you logged into. This cannot be changed and represents the account that is affected by local options.

**Company Name** - (Local) This is the company name associated with the account. You cannot manually change this option, as it is set up based on your merchant profile. If your company name is incorrect or you need to change it, see Tips and Pointers: Updating your company name.

**Representative ID** - (Local) If you are an organization that has more than one sales agent using Merchant On The Move on a single merchant account, you can assign a different Rep ID to each sales representative. This allows you to keep track of sales by Rep ID using the online analysis tools of your merchant account. If you are using multiple versions of our software (i.e., other mobile devices, PC-based software or checkout stations) this software can also be configured with a Rep ID. The Rep ID gives you added functionality in analyzing your sales.

Sales Information

**Sales Tax Rate** - (Global) This is the tax rate that you enter for your place of doing business. In some cases, the tax rate may be higher from one county to the next. You can change the tax rate depending on your location, however, by doing so, any pending sales that had the tax rate added will also reflect the new rate before they are processed. Due to the mobile nature of your business, we recommend that you keep the tax rate specific to your county or to use the State's tax rate (for information on how to calculate tax rates, visit the web site of your state's Board of Equalization).

**Always Add Sales Tax** - (Global) This option allows you to automatically calculate the tax on each sale. Merchant On The Move makes it easy to add and remove tax for an item with a simple tap. If not all your items are taxable, then you might want to leave the feature off.

**Send Signature to Server** - (Global) If you do not want to send the customer's signature to the server, turn this feature off. Signature can take up to any extra 4K a data transfer per sale. However, due to the relatively low cost of data and unlimited usage plans, we recommend keeping this feature turned on. Server-side signature storage is a useful tool should you require proof of signature for any contested sales. In the rare instance, when you are using the software outside the country where data
roaming fees may apply, you have the option of turning this feature off and opting for printed receipts with signatures instead.

Card Reader and Printer

**Receipt Header and Footer** - (Local) By default the header is populated with your company's address and phone number, where the footer contains a "Thank you" note. Both of these fields can be changed to custom text. Text is centered and there is no limit to the number of lines you can add. However, printer functions limit the text to 32 characters in length. We recommend that you print a test receipt first, after editing these fields. Also, it is recommended that headers and footers not exceed 3 to 4 lines in height.

**Show Tip Suggestions** - (Global) Turn this feature on to display tip suggestions on your service receipts.

**Auto Print Approved Sales** - (Global) Turn this feature on if you will always be using the Merchant on the Go with your sales. Once a credit card sale is approved, the receipt is automatically printed for the customer.

Bluetooth Setup

The Merchant on the Go uses a Bluetooth connection in order to communicate with your Android device. In order to use the Merchant on the Go, your device must be running Android 2.01 (OS) or greater. If it is not, please upgrade your software or the phone. Using the Merchant on the Go greatly simplifies and speeds up the process of taking credit cards and printing sales receipts while being mobile.

We recommend that you read through the procedure once before starting the pairing process.

To set up your device with the Merchant on the Go...

- make sure that the Merchant on the Go is fully charge
- make sure that there is paper in the Merchant on the Go
- make sure that your Android phone is fully charged
- make sure you are running Android OS 2.01 or greater

Setting up the Merchant on the Go Involves 3 steps
1. Resetting the Merchant on the Go
2. Pairing the Merchant on the Go with your device
3. Finalizing the pairing and selection process

To start the process follow these steps...

Resetting the Merchant on the Go

1. Turn the Merchant on the Go off (if it is already on)
2. Press and hold the ON button for three seconds
3. Once the diagnostic sheet starts printing, release the ON button

The Merchant on the Go is now ready to be paired with your device.

Pairing the Merchant on the Go with your device

1. Turn on your Android Phone
2. Make sure you are on the home screen (no applications are open)
3. Tap on the device's menu button to open the popup menu
4. Tap the Settings button
5. Tap Wireless & Networks then Bluetooth Settings
6. If Bluetooth is off, turn it on (1st item on the list)
7. Tap Scan for Devices
8. When the the device starting with MPS appears, tap on it to pair
9. Tap on Pair & Connect
10. In the Bluetooth paring request type the PIN number: 1000
11. Tap OK

The Merchant on the Go will now be paired but not connected.

- In step nine you should see a device starting with MPS (for example MPS909004). If you do not, make sure the Merchant on the Go is on and fully charged (see the Merchant on the Go documentation for details on how to charge the device).

- Should you have trouble with the paring process (step 11) or a message appears saying that the passcode in not correct, please try again. The passcode is 1000. If the passcode still does not get accepted, make sure that the Merchant on the Go is fully charged, then reset the Merchant on the Go and try again (note that multiple resets and attempts may also drain the battery significantly).
Finalizing the pairing and selection process

1. Turn off the Merchant on the Go
2. Start Merchant On The Move
3. Log on to your merchant account
4. Start a new Credit Card Sale
5. Turn on the Merchant on the Go
6. Tap on the Swipe Card button
7. When the Select Device window appears, tap on the MSP device
8. Tap OK

After a brief moment the Swipe Card screen will appear.

The software is now setup to work with the selected (MPS) Merchant on the Go. Each time you are ready to swipe a card or print a receipt, make sure the Merchant on the Go is turned on. A simple beep on the Merchant on the Go after it is turned on will indicate that it is ready to be used with the Merchant On The Move software.

Important:

• Once pairing is completed, it is important to turn off the Merchant on the Go (step 1). When the Merchant on the Go is turned back on (step 5) the pairing information is finalized in the Merchant on the Go

• In step 7, you must select the device to be paired. Even if there is only one device, it must be selected before tapping on the OK button.

Tips and Pointers

Accessing your account online

All sales are process through the Transaction Central gateway. Should you wish to get detailed information about any approved sales, check settlements, issue partial credits, or to print receipts with signature captured by your device, you can do so at:

http://www.EnterTransactions.com
Changing the invoice number

Invoice numbers are automatically generated for each new sale. To change the invoice, simply click on the invoice and modify it.

Bad reception

If you are located in a rural area where a data connection is not available, sales can be saved as pending transactions. Pending sales must have at least the holder's name, card number and expiration date before it can be saved. Swiped transactions will be down qualified to keyed transactions when saved.

Getting errors at the Account Logon Screen

Although highly unlikely, should you experience any file or corruption errors when trying to log into your account, Merchant On The Move has a reset feature that will attempt to remove the corrupted files.

Corrupted files may occur when your device it reset before closing the program or when there are power surges when attempting to charge your device during a lightening storm.

To reset your software from the logon on screen, enter 00000 into the MID field then follow the prompts. Use this feature only as a last resort if you have pending sales in your sales history. This process will remove all your sales history and attempt to repair Merchant On The Move.

Deleting a pending sale

To delete a pending sale, tap on it from the sales screen and select the Summary tab. Press the device's menu button to open the popup menu and tap the Delete button.

Note: The Card, Customer, and Sale Info tab display a Clear button in the menu popup. Only the Summary tab will display the Delete button in the menu popup. If you are entering a new sale, this button will change to a disabled Clear button.

Updating your company name

The company name cannot be changed manually. You must first contact your merchant provider and fill out a DBA Change Request form. The bank and your merchant provider
will update your file and tell you when the changes have been made. You can then update the DBA (your company name) in the software by logging on to your account and pressing the device's menu button while on the Main menu. In the menu popup, select Update DBA. The update will also update the header and footer settings for the receipt.
Merchant Information:

MID / TC Logon ID:

Activation Code:

Logon Password:

Gateway Merchant ID:

Merchant Representative Tel:

Notes: