PROCHARGE®

- Mobile App
- Virtual Terminal
- EMV/NFC Payments
- Auto e-Invoicing
- Real-Time Reporting
- Recurring Billing
- Cash Discount Support
- QuickBooks® Plugin

ProCharge® Mobile EMV User Guide

Powered By ElectronicPayments®

Technical Support: 800-966-5520 – Option 3

Contents

Overview

This guide provides detailed instructions on installing and operating the ProCharge® Mobile EMV App. Instructions follow best practices to facilitate successful installation and operation of the app on supported Apple and Android mobile devices.

Getting Started

The following procedures summarize the process of logging into the app once it's downloaded to your mobile device. Apple users should download the app from the App Store. Android users can download the app from the Google Play Store app.

NOTE: Electronic Payments recommends updating your Apple or Android device to the latest version before downloading the ProCharge® Mobile EMV app.

Creating a ProCharge® Mobile EMV PIN

After downloading and opening the app, ProCharge® Mobile EMV prompts users to create a four-digit PIN. Enter and re-enter the PIN, and then store it in a safe place for easy retrieval, if needed.
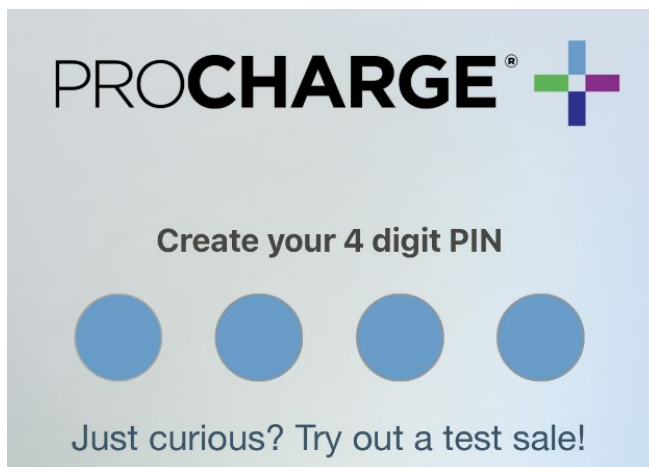
NOTES:

- Uninstall, then re-install the app if you encounter any trouble creating a PIN or logging in.
- Depending on the device, merchants may be prompted to enable the device's microphone features as well as receive notifications. These prompts are optional.

Logging into the App

Once you've created a PIN, the app prompts users to enter login credentials. Enter the following, and then tap **Login**:

- **User Name:** Provided by Electronic Payments (typically, an email address)
- **Reg Key:** Provided by Electronic Payments
- **Password:** Created by the user

Users can also select the **Remember Me** toggle to allow ProCharge® Mobile EMV to pre-populate saved credentials during future log-in attempts.

NOTE: User credentials from earlier versions of ProCharge® also work with ProCharge® Mobile EMV. Contact Technical Support to reset passwords or to resolve any password difficulties.

# Pairing with a Bluetooth Device Login

ProCharge® Mobile EMV can be paired with a Bluetooth device, such as the ProCharge® Mobile reader, to process mobile transactions. Perform the following within the app to make this connection:

1. From the menu, navigate to **Credit** > **Sale**.

2. Enter a test transaction amount (i.e., $0.02) and process a transaction.
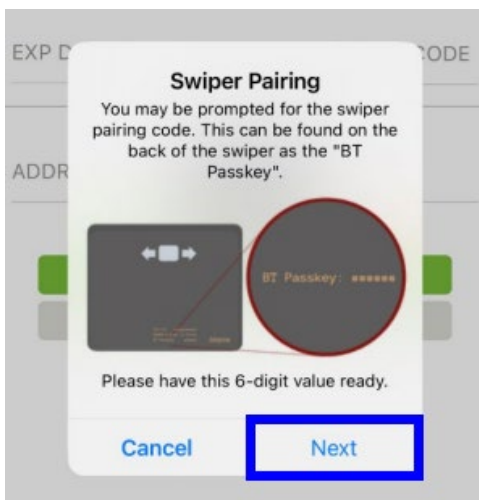
   NOTE: For detailed instructions on completing credit sales, see Credit Transactions.
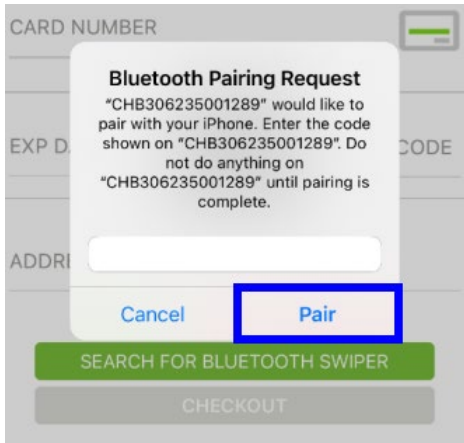
3. On the Card Entry screen, tap **Search for Bluetooth Swiper** to connect to an available device.
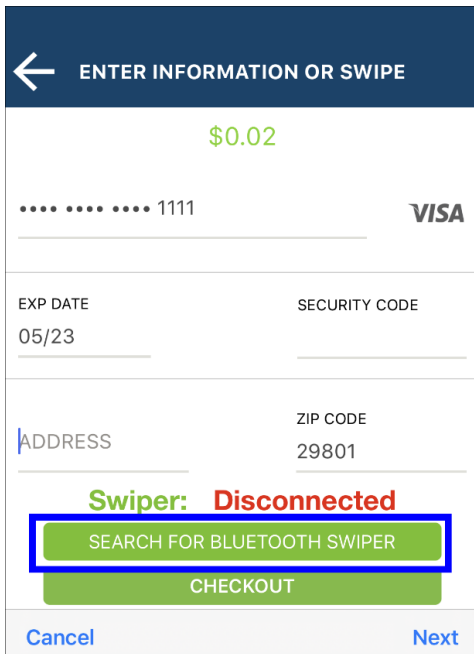
4. When the **Swiper Pairing** pop-up displays, enter the six-digit code printed on the back of the

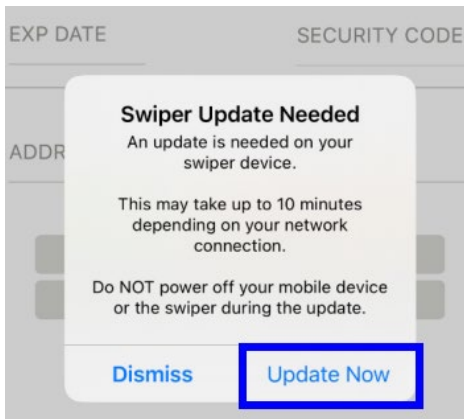   Bluetooth device, then tap **Next**.

5. Follow the instructions on the **Bluetooth Pairing Request** pop-up, then tap **Pair**.

6. When the **Swiper Update Needed** pop-up displays, tap **Update Now**.

   NOTE: Do not turn off the app or swiper during the update.

7. Once the update completes, navigate to the payment screen, and insert the Bluetooth swiper into the phone port.

8. Complete payment with a card, inserting the chip or tapping for contactless payment.

9. Remove the card when prompted. The signature panel screen displays.

10. Enter a signature and tap **Pay**.

Tab Descriptions

Tap one of the tabs under the **Global Menu** in the top left corner of most screens to perform basic functions. The following table provides a high-level description of each tab in the ProCharge® Mobile EMV app.

Section	Setting	Description
Credit	Sale	Processes credit sales
	Refund	Processes credit refunds
Gift	Redeem	Redeem eGiftSolutions gift cards
	Activate	Activate eGiftSolutions gift cards
	Add Value	Add value to eGiftSolutions gift cards
	Balance Inquiry	Check balance of eGiftSolutions gift card
	Balance Transfer	Transfer balance to/from an eGiftSolutions gift card
Cash	Cash	Process cash sales
Manage	History	Review history of individual transactions
	Invoices	View or create invoices
	Inventory	View or add to inventory
Log Out	Log Out	Log out of ProCharge® Mobile EMV

Tab Buttons and Icons

Under each tab are various icons that perform essential functions when using the ProCharge® Mobile EMV app. The following table includes a description of each of these icons.

Function	Image	Description
Global Menu		Access other app functions.
Shopping Cart Tab	Shopping Cart	Tap to process credit sales manually by entering a specific dollar amount.
Inventory Tab	Inventory	Tap to process credit sales by selecting items saved in inventory.
Keypad Button		Tap to enlarge the digital keypad (**Shopping Cart** tab only).
Search Button		Tap to search for items in inventory (**Inventory** tab only).

Navigating the App

The ProCharge® Mobile EMV app is designed for easy navigation, allowing merchants to conduct business while on the go. Merchants can process payments, manage inventory, track invoices, and much more.

Credit Section

In the **Credit** section, merchants can process credit card sales and issue refunds.

Sale

Navigate to **Credit > Sale** to conduct credit transactions. Merchants can manually process sales by entering a dollar amount or searching for and adding specific items.
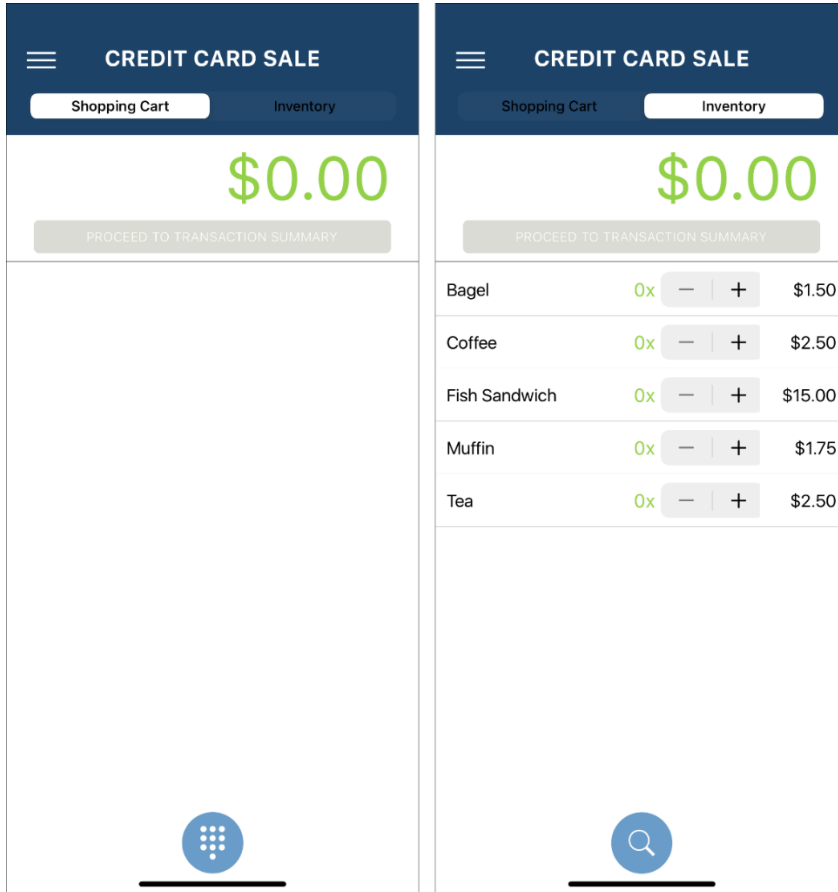
Refund

Merchants can use the **Refund** function to issue open-ended refunds to customers.

**NOTE:** Refunds for specific transactions are performed under the **History** section.

Gift Section

The **Gift** section allows users to process transactions with an eGiftSolutions gift card. Users can perform a variety of functions, including redeeming, activating, adding value, checking balances, and transferring balances.

Redeem

Tap **Redeem** to process payments made with an eGiftSolutions gift card. Merchants can enter a specific dollar amount or select specific items from inventory.
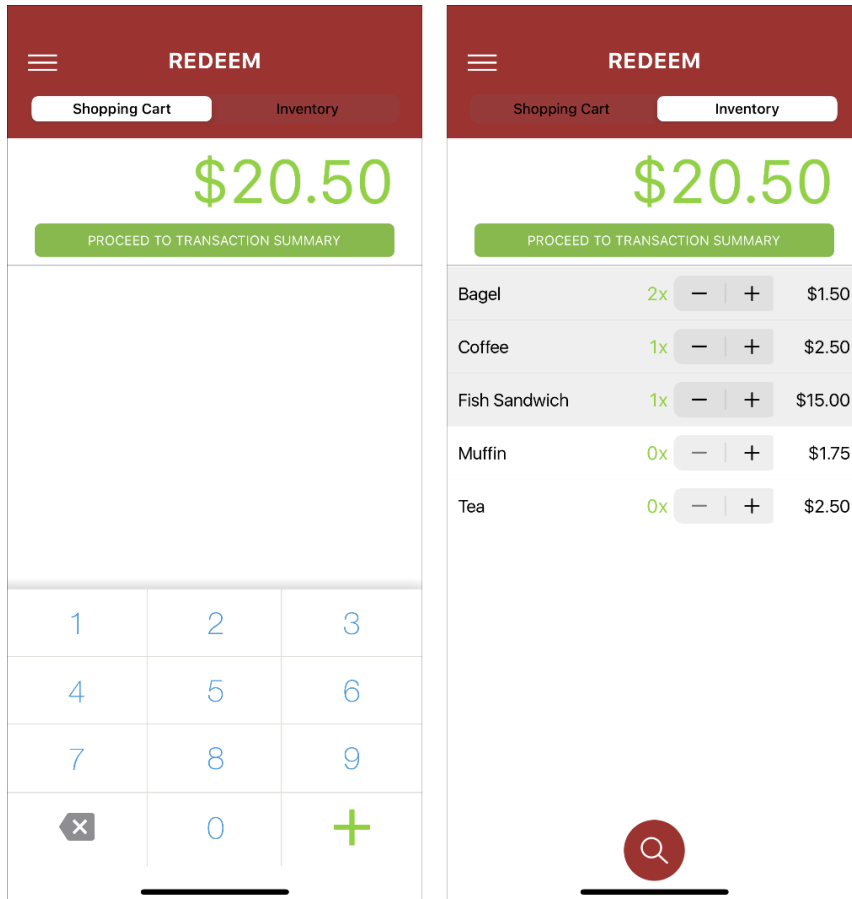
Activate

Tap **Activate** to enter a dollar value to a mew eGiftSolutions card and to activate it.
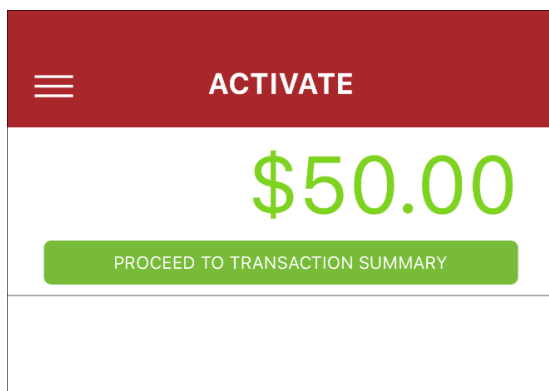
Add Value

Tap **Add Value** to increase the value of a previously activated eGiftSolutions card.
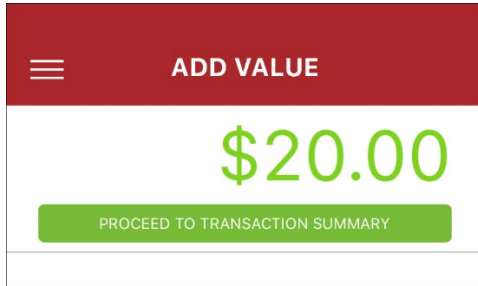
Balance Inquiry

Tap **Balance Inquiry** to view the current balance by entering the card number for a previously activated eGiftSolutions card.
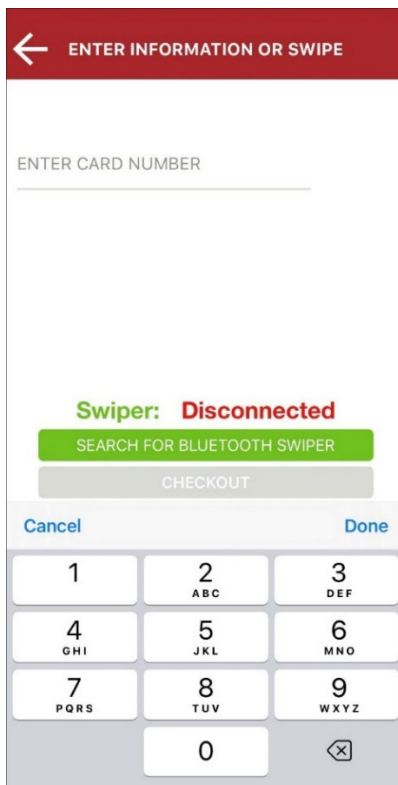
Balance Transfer

Tap **Balance Transfer** to transfer part or all of the balance from one eGiftSolutions card to another.
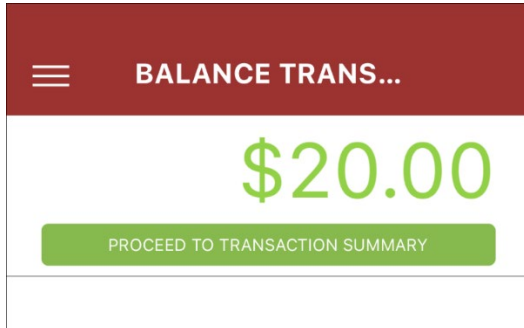
Cash Transactions

Tap **Cash** to process transactions paid for with cash. Merchants can enter a specific dollar amount under the **Shopping Cart** tab or select items under the **Inventory** tab.
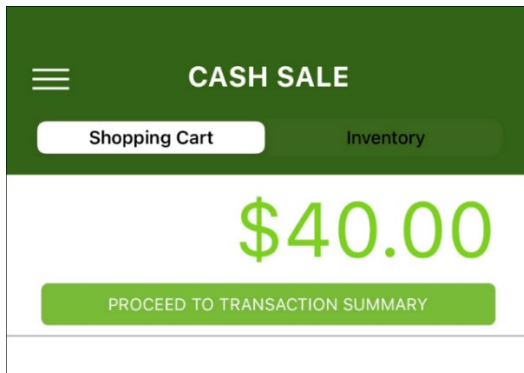
Manage Transactions

In the **Manage** section, merchants can track transaction history, add and track inventory, and create invoices.

History

Navigate to **Manage** > **History** to view a running list of recently conducted transactions. Transactions are grouped according to date, and contain the transaction amount, transaction time, and payment method. Users can also process voids and refunds for individual transactions. The following table provides a high-level description of various payment methods listed under the **History** tab:

Payment Method	Payment Method Image	Payment Method Description
Credit	VISA	Denotes credit or debit purchases
eGiftSolutions Gift Card	🎁	Denotes eGiftSolutions gift card purchases
Cash	💵	Denotes cash purchases

Invoices

Tap **Invoices** to create a new invoice. Merchants can also pay and edit invoices.

Inventory

Tap **Inventory** to review items in inventory. Add items to inventory by tapping the **Plus (+)** icon. Delete items by swiping an item and tapping **Delete**.

Log Out

Tap **Log Out** to log out of the ProCharge® Mobile EMV app.

Using the App

Credit Transactions

Under the **Credit** tab, merchants can conduct credit card sales and issue refunds.
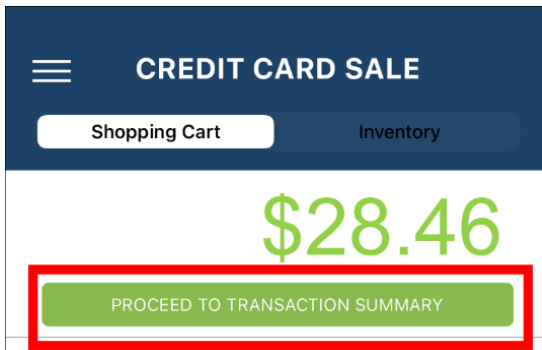
Credit Sales
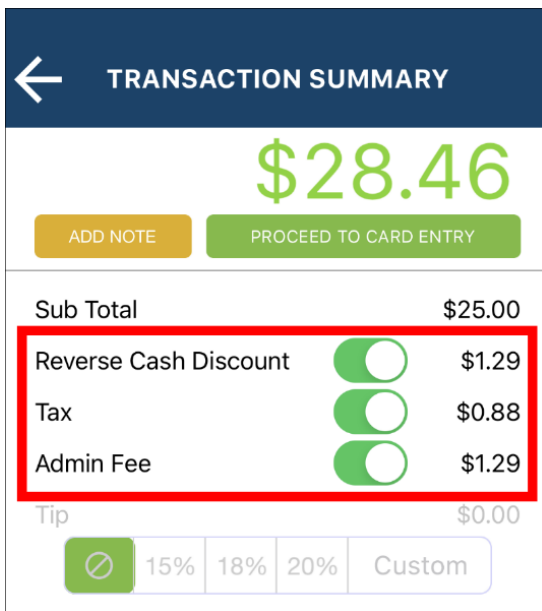
1. From the **Global Menu**, navigate to **Credit** > **Sale**.
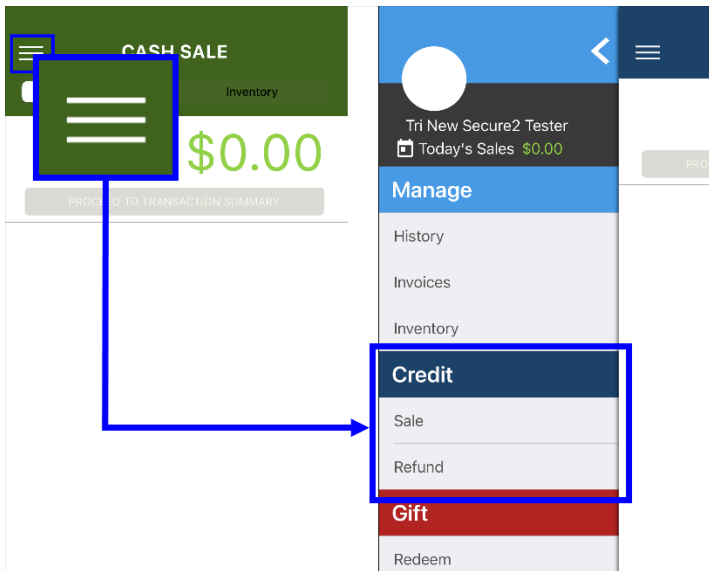
2. Perform one of the following:

   a. Tap the **Shopping Cart** button and manually enter the transaction amount.

   b. Tap the **Inventory** button and select the desired items and quantity.
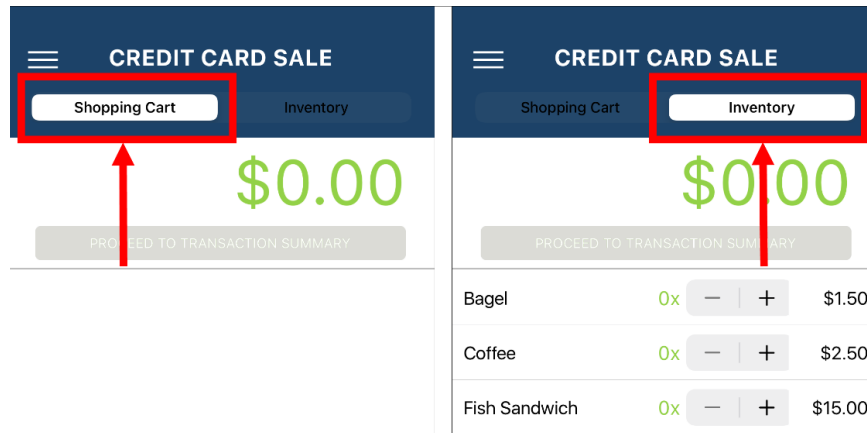
3. Tap **Proceed to Transaction Summary**. The Transaction Summary page displays.

4. Select all applicable taxes and/or fees.

5. Select a tip amount as desired.

6. **Optional:** Tap **Add Note** to enter a note, if desired.

7. Tap **Proceed to Card Entry**.
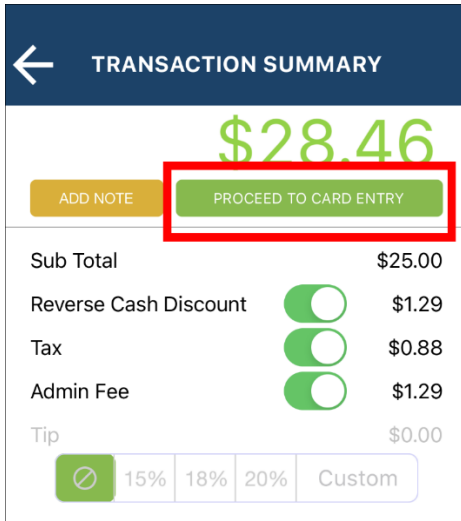
8. On the Card Entry screen, enter the customer's credit card payment information or swipe the card using the ProCharge® Mobile Reader or other Bluetooth swiper.

9. Tap **Checkout**. The signature panel displays.
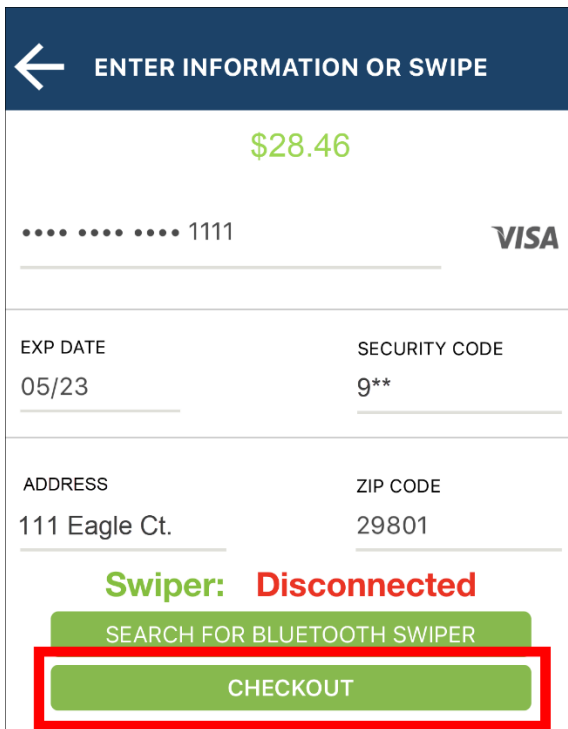
10. Tap **Pay** after the customer enters their signature.

Credit Refunds

Merchants can process open-ended credit refunds using either the **Shopping Cart** or **Inventory** tabs.

1. From the **Global Menu,** then navigate to **Credit > Refund**.
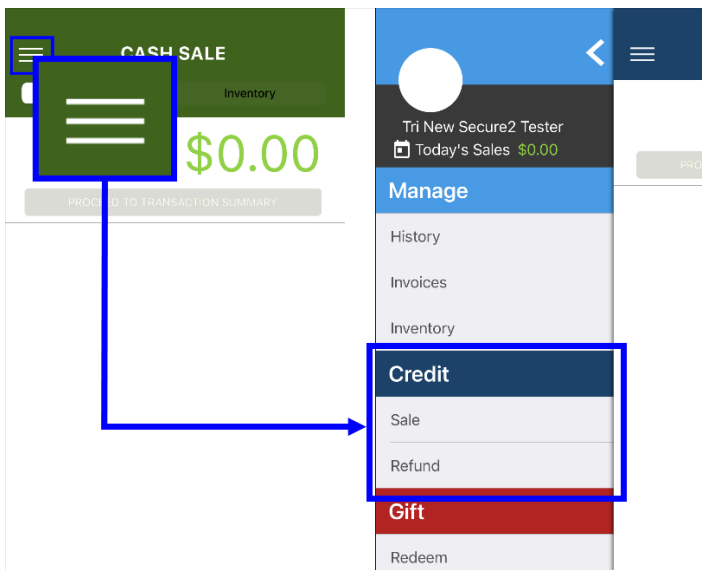
2. Enter a refund amount, then tap **Proceed to Transaction Summary**.
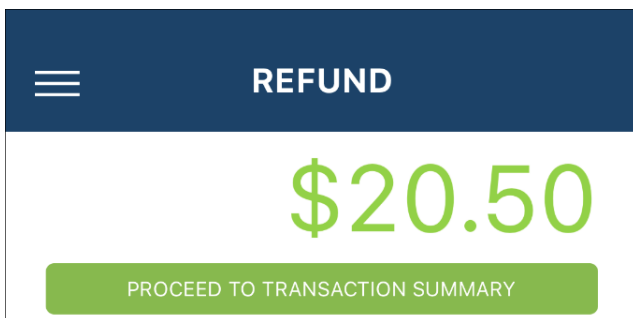
3. Enter credit card information for the card where the refund will be applied.

4. Tap **Checkout**.
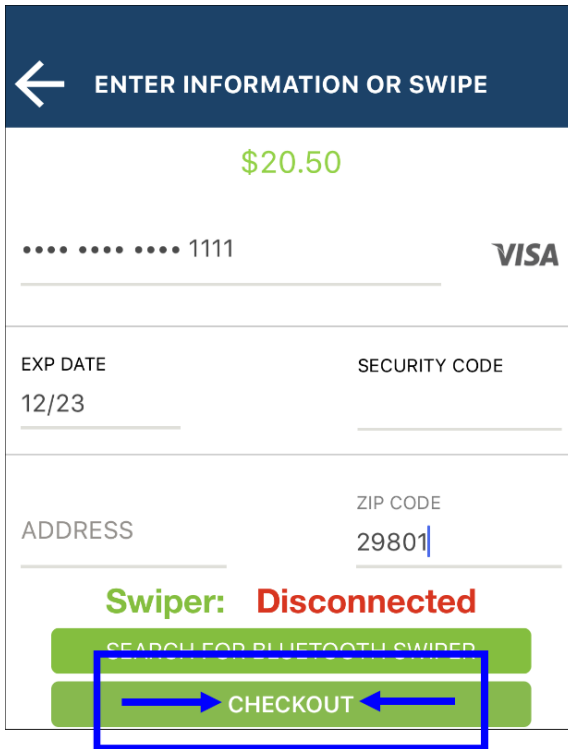
5. Tap **Refund** after the customer signs their name on the refund signature screen.
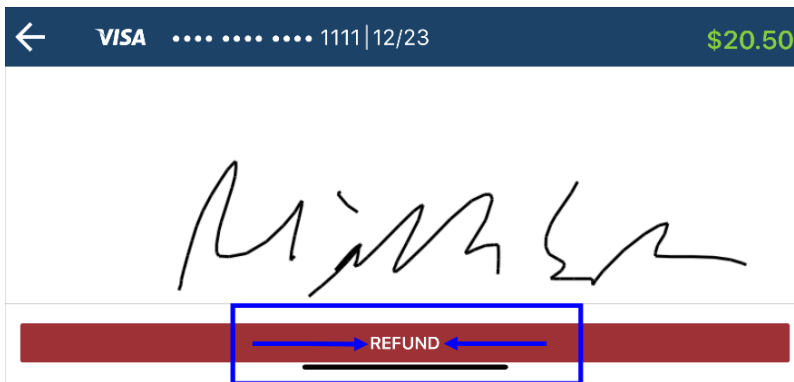
6. If the transaction declines, perform one of the following:

    a. Tap **New Transaction** to start a new transaction.

    b. Tap **Try Again** to process the card a second time.

    c. Tap **Save Invoice** to create an invoice and bill the customer.
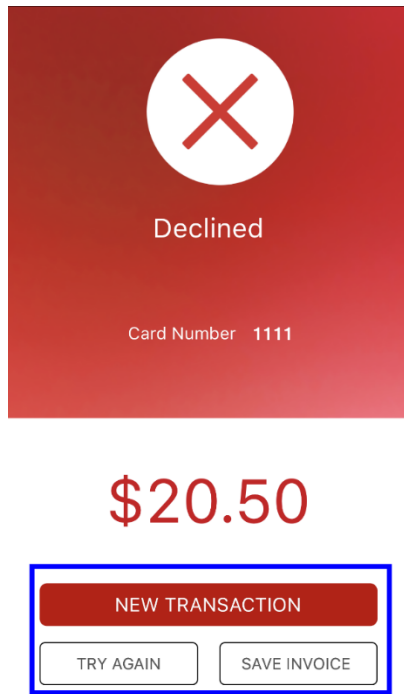
Gift Cards

Processing eGiftSolutions cards for payments and refunds follows similar procedures as credit card transactions. Additionally, merchants can add value to cards and transfer balances from card to card.

Redeem Gift Cards

1. Navigate to **Gift** > **Redeem**.

2. Perform one of the following:

    a. Tap the **Shopping Cart** button to manually enter the transaction amount.

    b. Tap the **Inventory** button and select the desired items and quantity.
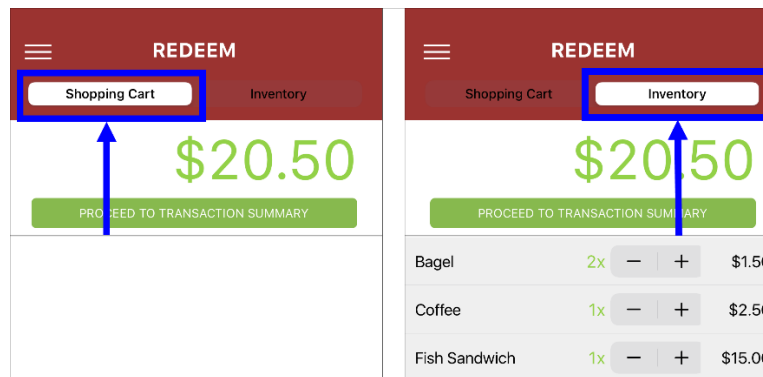
3. Tap **Proceed to Transaction Summary**. The Transaction Summary page displays.
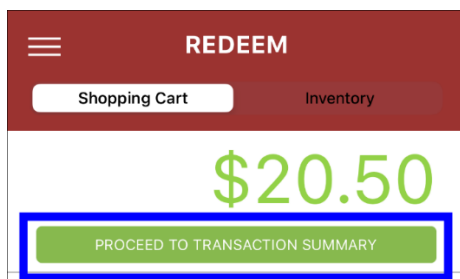
4. **Optional**: Tap **Add Note** to attach a note to the transaction.
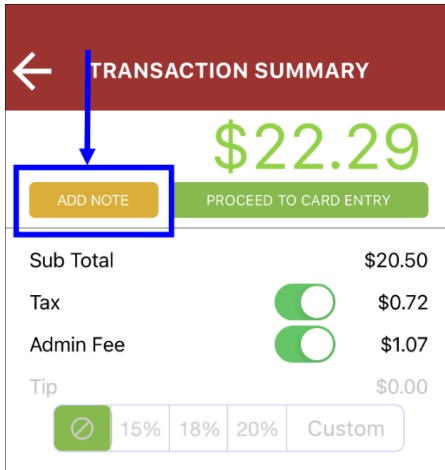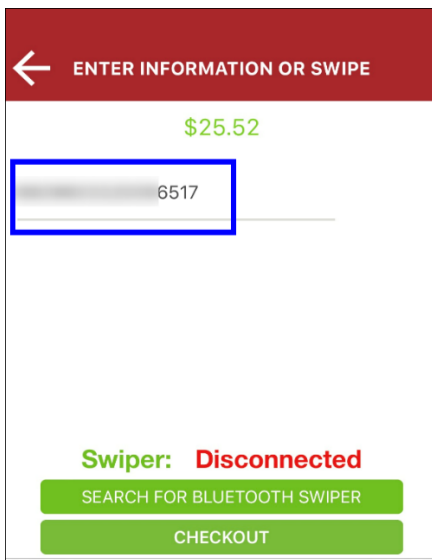

5. Select all applicable taxes and/or fees.
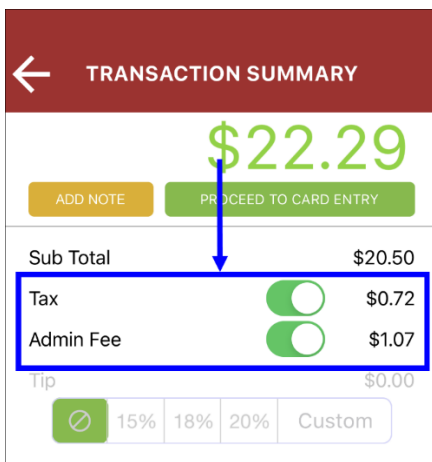
6. Select a tip amount as desired.
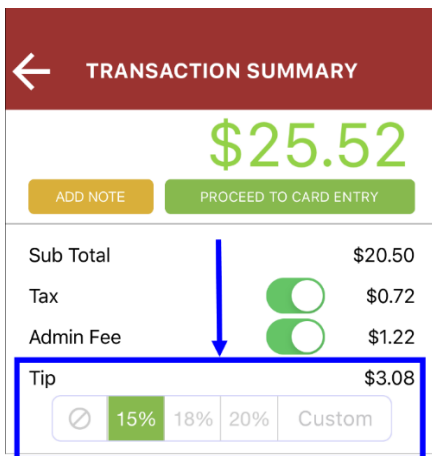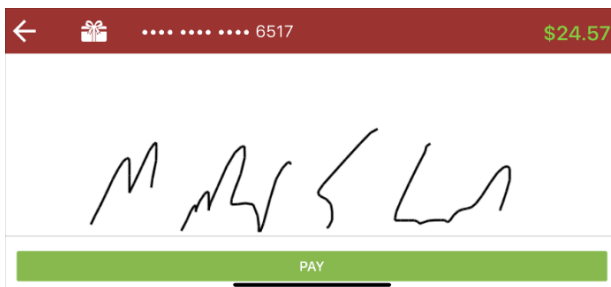
7. Tap **Proceed to Card Entry**.
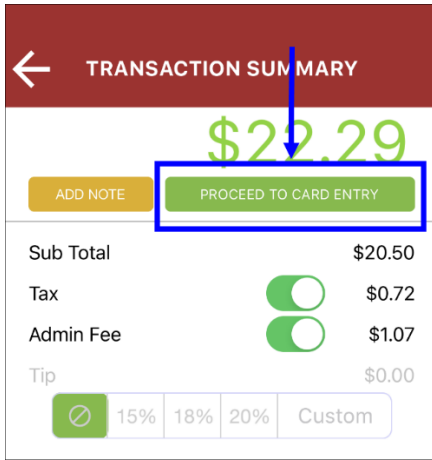
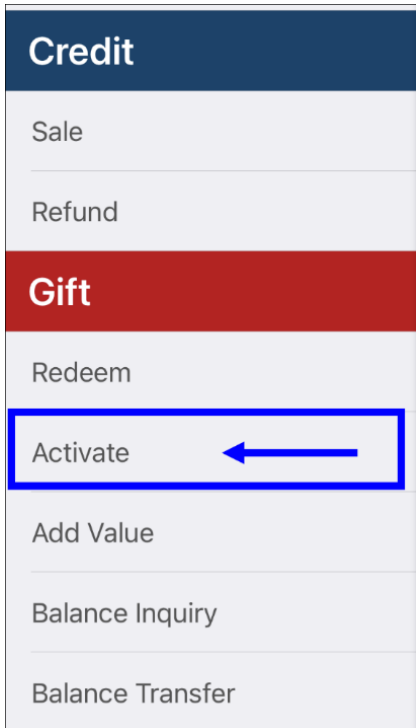8. On the Card Entry screen, swipe the card or enter the gift card number.

9. Tap **Checkout** or **Done**. The signature panel displays.

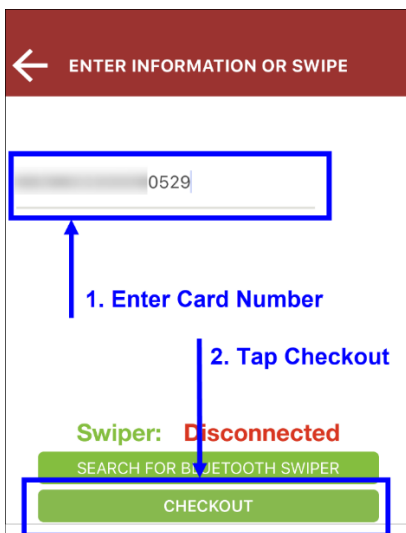10. Tap **Pay** after the customer enters their signature.

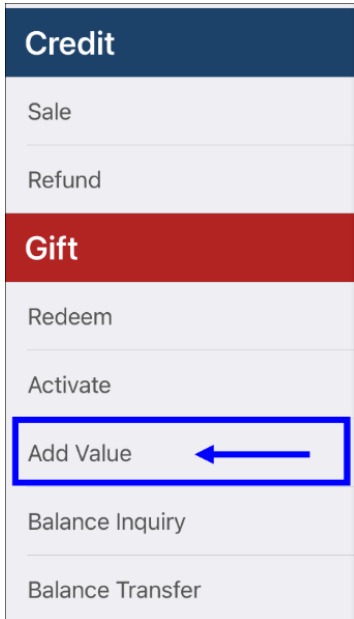## Activate Gift Cards

1. Navigate to **Gift** > **Activate**.

2. Enter a value for the new eGiftSolutions card.

3. Tap **Proceed to Transaction Summary**.

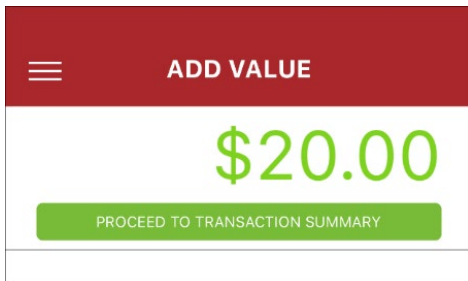4. On the Card Entry screen, swipe the card or enter the customer's card number.

5. Tap **Checkout** or **Done**. The signature panel displays.

6. Tap **Pay** after the customer enters their signature.

Add Value

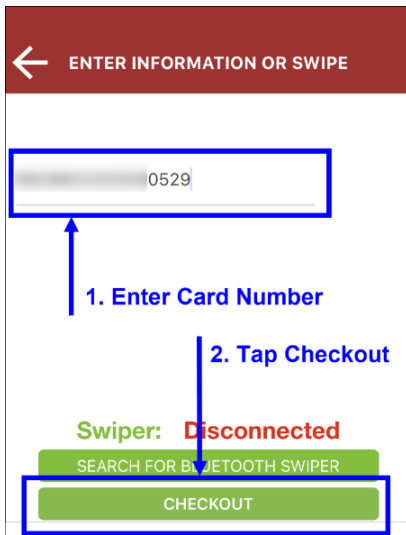1. Navigate to **Gift** > **Add Value**.

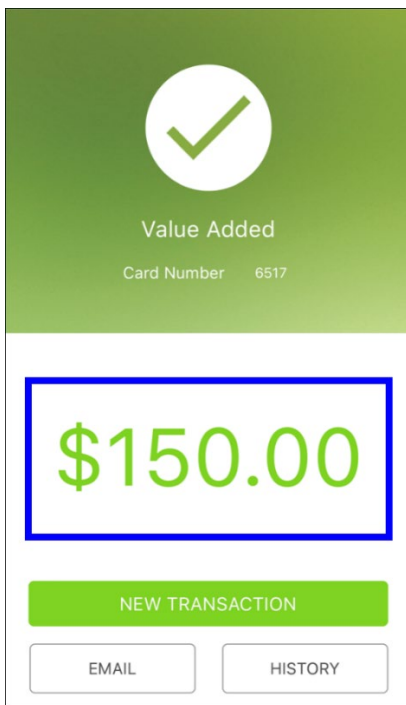2. Enter the value to add to an existing eGiftSolutions card.

3. Tap **Proceed to Transaction Summary**.

4. Enter the 16-digit number of the card that is receiving additional value.

5. Swipe the card or tap **Checkout**.

6. The card's new value displays on the Value Added screen.

7. Tap **New Transaction** to return to the main menu.

8. **Optional:** Tap **Email** to email a receipt to the customer. Follow the prompts on the **Email Receipt** pop-up that displays. Tap **History** to view a history of eGiftSolutions transactions.
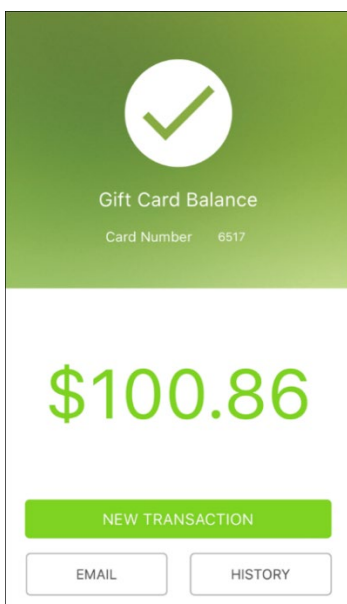
Balance Inquiry

1. Navigate to **Gift** > **Balance Inquiry**.
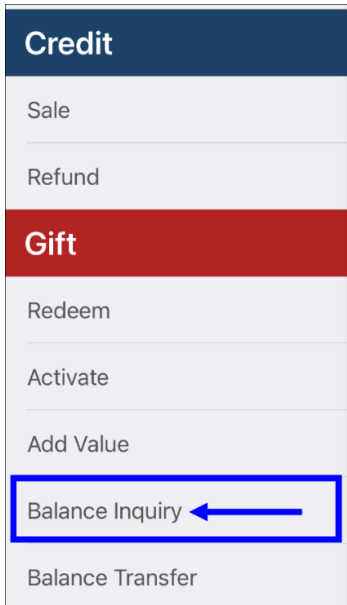
2. Enter the number of the card which is being checked, then tap **Done**.

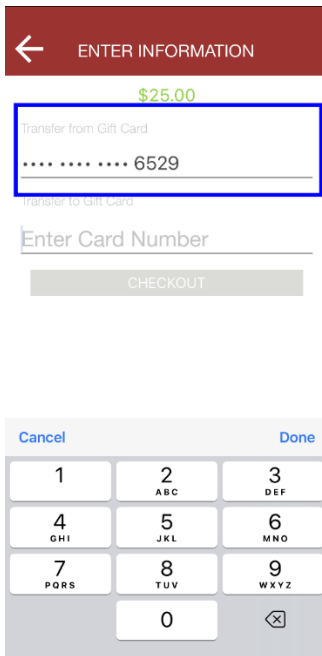   **NOTE:** Do not tap **Checkout**.

3. The Gift Card Balance screen displays the card's current value.

4. Tap **New Transaction** to return to the main menu.

Balance Transfer

1. Navigate to **Gift > Balance Inquiry**.

2. Enter the dollar amount to transfer.

3. In the **Transfer from Gift Card** field, enter the number of the card with available funds to transfer.

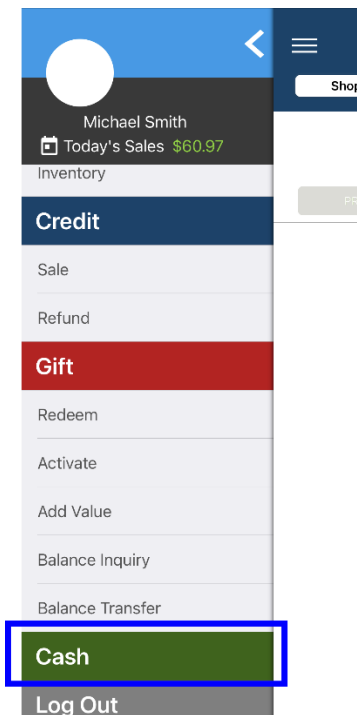4. In the **Transfer to Gift Card** field, enter the number of the card to receive transferred funds.
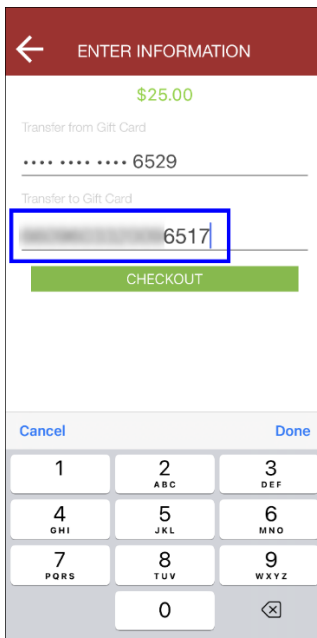
5. The Balance Transferred screen displays, confirming the transfer completed successfully.
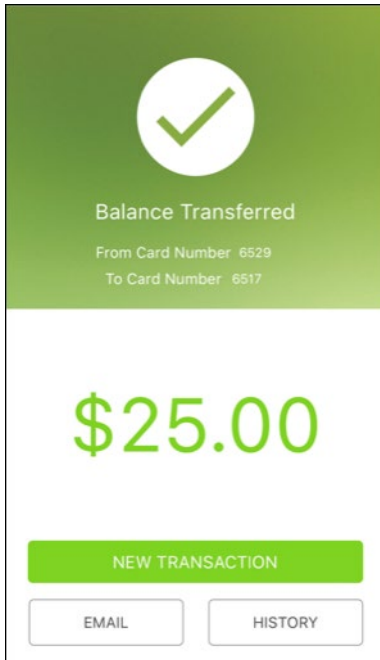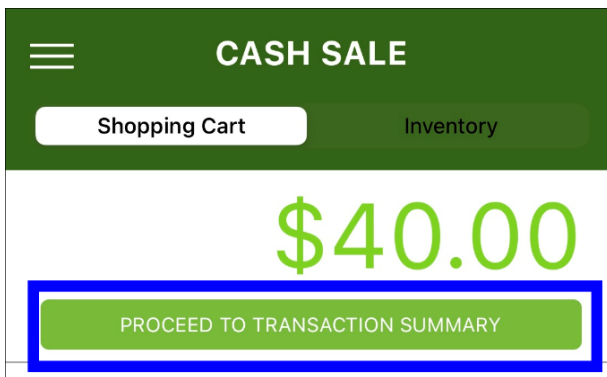

Cash Sale

1. Tap the **Global Menu**, then select **Cash**.

2. Perform one of the following:

    a. Tap the **Shopping Cart** tab to manually enter the transaction amount.

    b. Tap the **Inventory** tab to select the desired items and quantity.
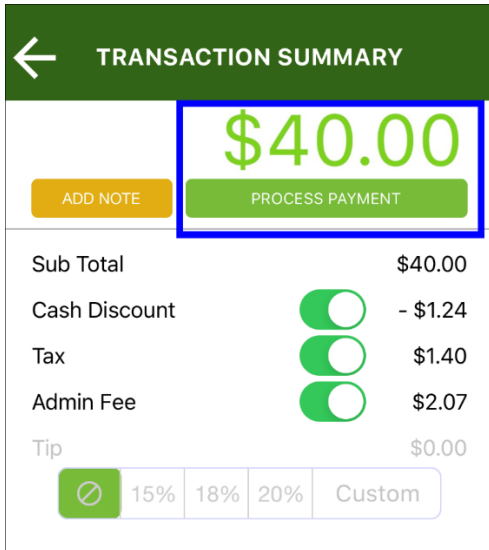

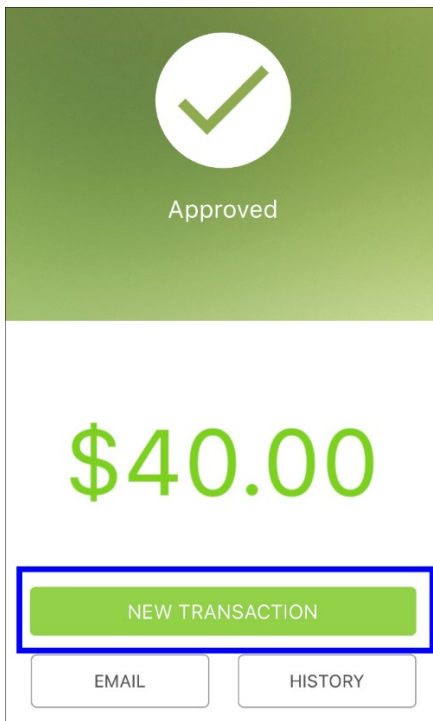3. Tap **Proceed to Transaction Summary**. The Transaction Summary screen displays.

4. Select all applicable taxes and/or fees and tip amounts.

5. **Optional:** Tap **Add Note** to attach a note to the transaction.

6. Tap **Process Payment.**

7. The payment confirmation page displays, confirming the transfer completed successfully.

8. Tap **New Transaction** to return to the **Main Menu**.

9. **Optional:** Tap **Email** to email a receipt to the customer. Follow the prompts on the Email Receipt

   pop-up that displays. Tap **History** to view a history of cash transactions.
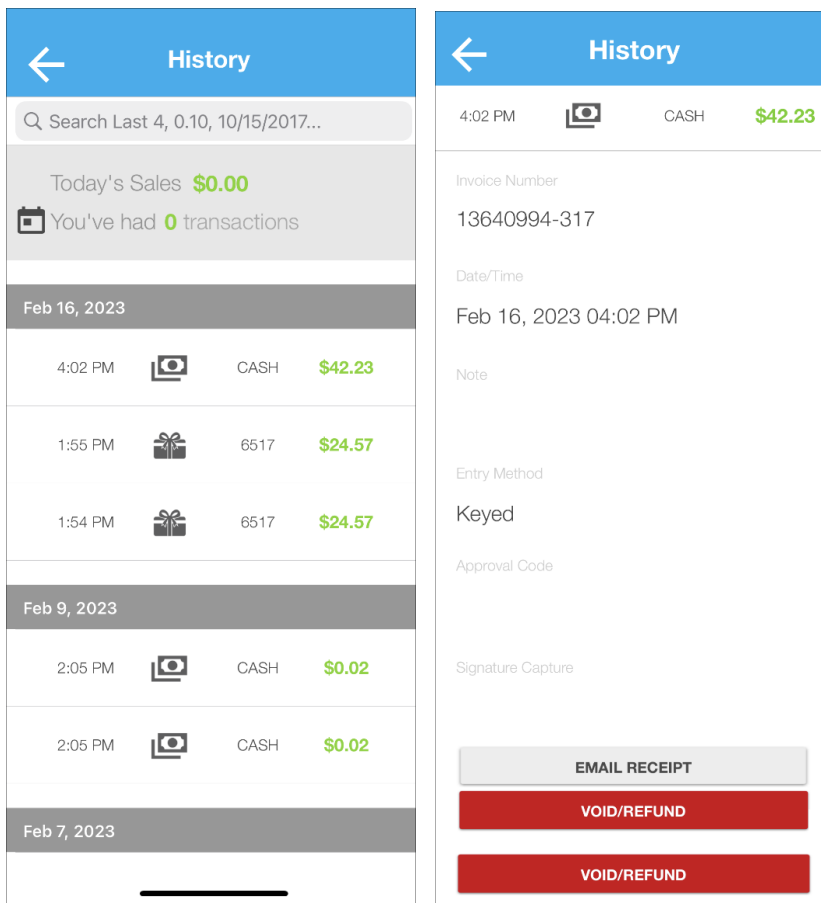
Manage

ProCharge® Mobile EMV's **Manage** section allows merchants to track transaction history, create and pay invoices, and add or subtract items from inventory.

History

Tap the **History** tab to review past transactions. Merchants can review the date, time, amount, and method of payment for all transactions or details of a specific transaction. The **History** tab also lets merchants email receipts from past transactions, void orders, or issue refunds for individual transactions.
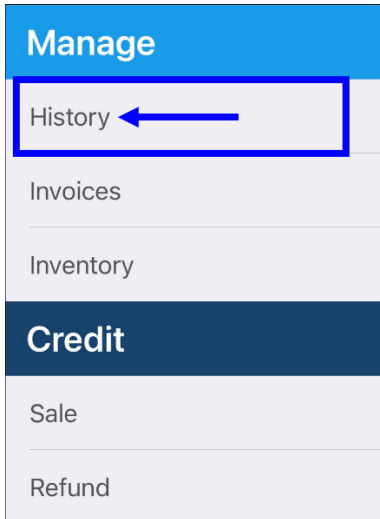
View Transaction History

1. Navigate to **Manage** > **History**. A list of all transactions displays.

2. Select a transaction to view additional details, such as invoice number, notes, or other data.

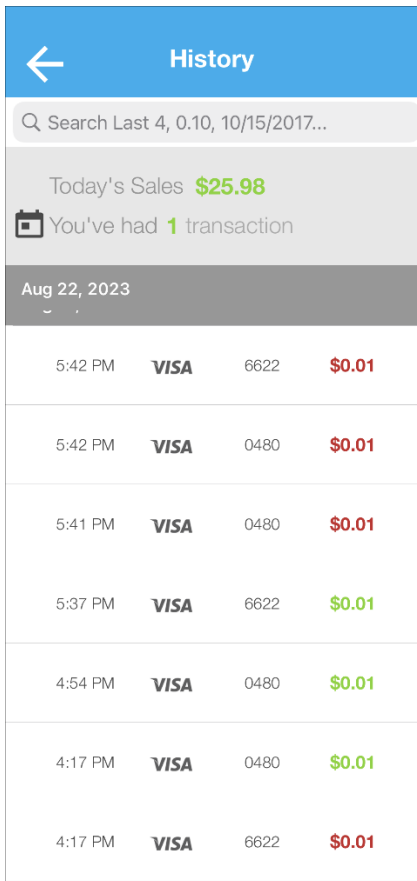3. Tap **Email Receipt** to email a receipt from the saved transaction.

Process Voids and Refunds

1. Navigate to **Manage** > **History**.
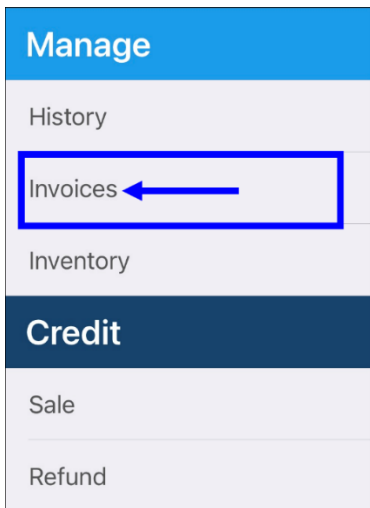

2. Select a transaction to void or refund.

3. Scroll down and perform one of the following:

    a. For Cash transactions, tap **Refund**.

    b. For Credit transactions, tap **Void/Refund**.
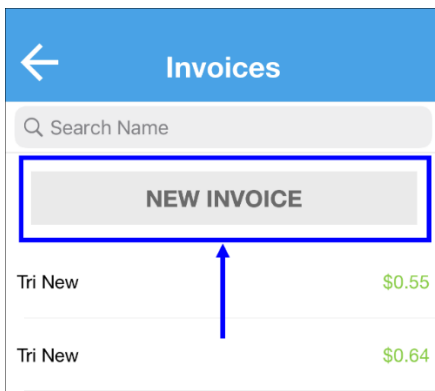
4. Tap **Reverse All** on the prompt that displays.

Invoices

Create New Invoices
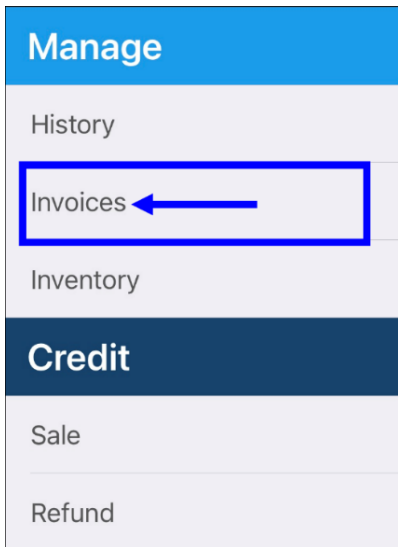
1. Navigate to **Manage** > **Invoices**.

2. Tap **New Invoice**.

3. Complete all fields as desired.

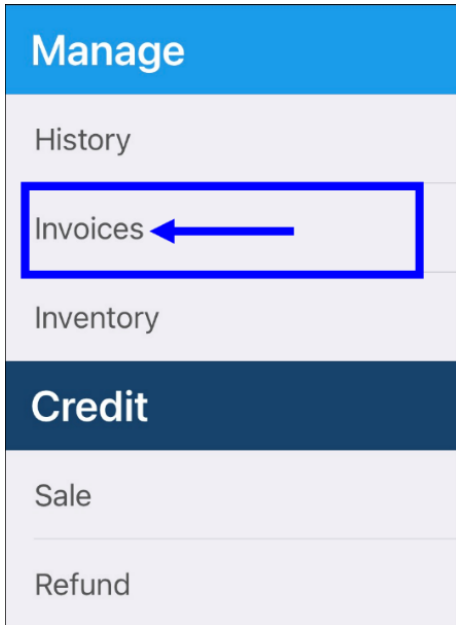4. Tap **Save Invoice**.

Editing Invoices

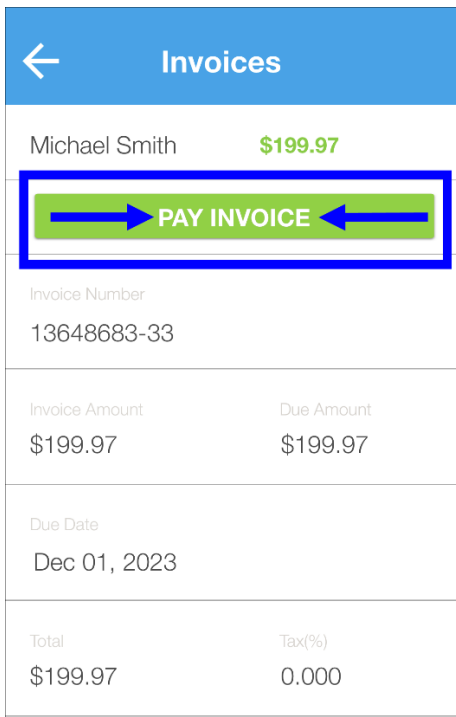1. Navigate to **Manage** > **Invoices**.

2. Select an invoice to edit or search for an invoice using the **Search** field.

3. Tap **Edit Invoice**.

4. Edit the invoice fields as desired.

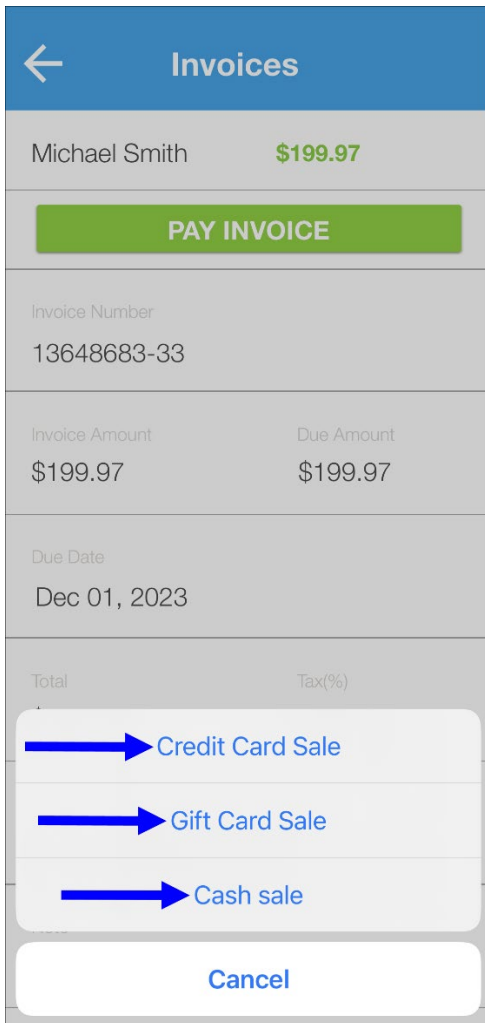5. Tap **Save Invoice** after completing any changes.

Paying Invoices

1. Navigate to **Manage** > **Invoices**.

2. Select an invoice to pay or search for an invoice using the **Search** field.

3. Tap **Pay Invoice**.

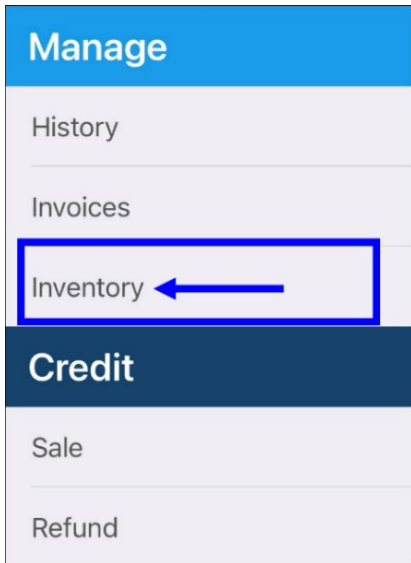4. Select a payment method and proceed with the transaction.
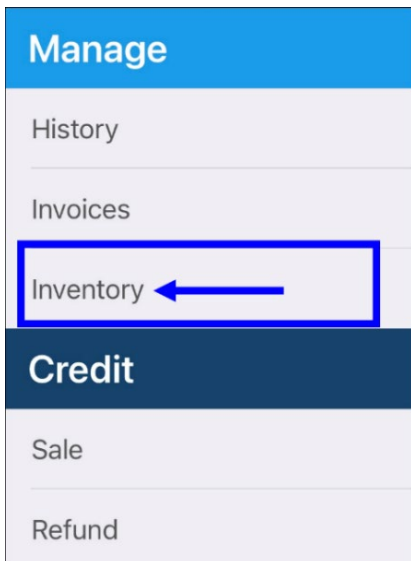
Inventory

Adding Items to Inventory

Perform the following to add items to inventory:

1. Navigate to **Manage** > **Inventory**.

2. Tap the **Plus Sign (+)** in the upper right corner of the screen.
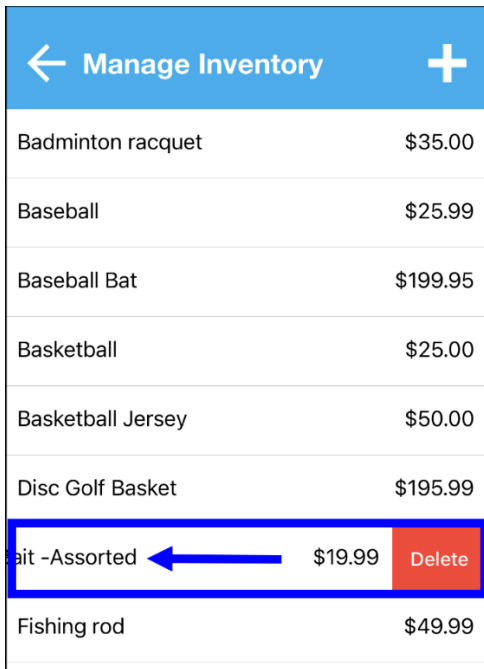

3. Enter the item name in the **New Item Name** field.

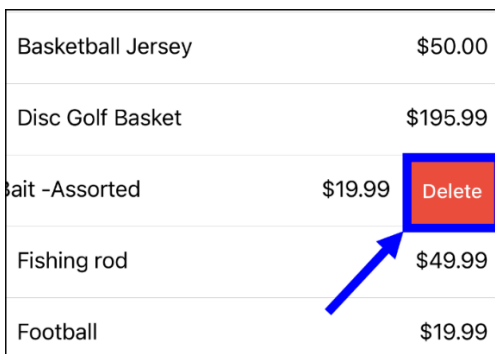4. Select the **Price** field and enter a price for the new item.

5. Tap **Done**.

6. Tap **Save**.

7. Repeat Steps 3-6 as desired to add more items.

Deleting Items From Inventory

1. From the Inventory screen, swipe left on the item to delete. The **Delete** button displays.

2. Tap **Delete**.

3. A success message displays, and the item is removed from inventory.

Manage Inventory	
Badminton racquet	$35.00
Baseball	$25.99
Baseball Bat	$199.95
Basketball	$25.00
Basketball Jersey	$50.00
Disc Golf Basket	$195.99
Fishing rod	$49.99
Football	$19.99
Football Cleats	$125.00
Football Helmet	$70.00
Golf Balls - Pro V1	$49.99
Golf Glove	$20.00
Golf Shirt	$60.00

Item deleted successfully