

Payment Jack

Quick Reference Guide

Credit Sale

Credit Sales are run from the main screen of the App

- Enter Amount of Sale
- Enter Sales Tax %, Tip %, or Tip Amount (Optional)
- Choose Continue or Calculate (depends on Settings)
- Verify Total is correct and choose Continue
- Enter Name, Address, Zip Code, City, or choose Skip. (Address and name are optional on swiped transactions. Choose Skip to bypass)
- Make sure the swiper is fully plugged in and choose Swipe Card icon
- Wait for the screen to display "Please Swipe Card," then smoothly swipe the card
- Enter the Email Address, Invoice/Order #, Additional Notes (Optional)
- Choose Submit Payment
- Choose OK after reviewing the receipt
- Have the Customer sign above the line and choose Done, choose OK
- Should display the main Sale Screen

Cash Sale

- Choose **Cash Sale** from the main screen
- Enter the Amount of the Sale
- Enter Sales Tax %, Tip %, or Tip Amount (Optional)
- Choose Continue or Calculate (depends on Settings)
- Verify Total is correct and choose Continue
- Enter Notes (Optional), check send receipt box, enter the customer's email address (Optional), choose Next
- Enter the customer's Home Phone #, check Collect Cust. Data (Optional), choose next
- Enter customer's Name, Address, Zip Code, City, State (All Optional info), choose Continue

Note: This step is skipped if reverse phone lookup was skipped

- Payment Submitted should display on the screen

Credit Refund

- Select **Refund** option from main screen
- Select Credit Sale Refund
- Enter amount to Refund
- Make sure the swiper is fully plugged in and choose swipe
- Wait for the screen to display "Swipe Card Now," then smoothly swipe the card
- Choose Next when data is collected
- Refund Successful should display on the screen

Void Transactions in Current Batch

- Select **Void** option from main screen
- Select desired transaction then choose Details button to view the transaction
- Verify you have chosen the correct transaction and choose void
- Select the Void Now button to void the transaction
- Transaction Voided should display on the screen

Offline Credit Sale

For offline transactions select option from main screen

- Select **Offline Credit Sale**
- Enter Amount of Sale, enter Sales Tax %, Tip %, or Tip Amount (Optional)
- Choose Continue or Calculate (depends on Settings)
- Verify Total is correct and choose Continue
- Make sure the swiper is fully plugged in and choose swipe
- Wait for the screen to display "Swipe Card Now," then smoothly swipe the card
- Choose Next when data is collected
- Enter Notes (Optional), check send receipt box, enter the customer's email address (Optional), choose Submit
- Should display Receipt Of Purchase, choose ok to return to the Offline Sale screen

Void Stored Trxs(Offline Mode)

For offline transactions select option from main screen

- Select **Offline Credit Sale**
- Select **Void** from the Offline Sale screen.
- Select the transaction to be voided and choose details
- Verify you have chosen the correct transaction and choose void
- Choose Void Now
- Transaction Voided should display on the screen

Upload Stored Transactions

For offline transactions select option from main screen

- Select **Upload Stored Transactions**
- Press the Upload All button
- Upload Results should display on the screen, choose continue
- Upload Complete should display on the screen

History

- Select **History** option from the main screen
- Select the desired report by highlighting, press Select button
- Scroll up and down to view additional transactions.
- Selecting a specific transaction will give you the option to resend the receipt

Troubleshooting

Can't get into the app:

- 1) The username and the password are case sensitive; make sure you are using upper case letters when you should be.
- 2) Verify the username and password you are using from the Activation E-mail and that they are correct.
- 3) Delete the app from the phone, power off and then turn on the phone. Then download the app again and use the username/password combination, from the activation E-mail sent.

Device will not swipe:

- 1) Make sure the media/headset volume is at 100%. Hit the swipe button. When it says swipe card now, hit the up volume button on the side of the phone repeatedly until it shows on the screen media/headset volume 100%. Once the volume is all the way up, stop hitting the volume button. Count to three and then swipe the card with the magnetic strip facing the correct direction. If you are facing the front of the swiper (with the website,) you should also be looking at the magnetic strip. For BlackBerry devices, turn up the media volume from your media player.
- 2) Ensure there isn't a protective cover on the phone. Protective covers will not allow the swiper to plug in all of the way. If there is a protective cover, remove it.
- 4) Make sure to turn the Bluetooth setting off completely. This should be done through the connection settings of your device.

Still having troubles? Call or E-mail Payment Jack for further troubleshooting. Please call from a separate line than the device being used.

Payment Jack Customer Care Contacts

www.paymentjack.com

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To View and print our detailed Easy User Guide please go to:
http://merchantforms.com/forms/PaymentJack_EasyUserGuide.pdf

