Chase POS User Guide

Grow your business – whenever and wherever you want in Canada!

April 25, 2024

Contents

Welcome to Chase POS

Chase POS[1] allows you to accept credit and debit card payments[2] wherever your business takes you in Canada.

All you need is an internet connection, one or more Chase POS terminals, and a merchant account with Chase® Merchant Services.

This user guide will provide all the information you need to get Chase POS set up and ready to accept payments.

Don't have an account?

If you do not have a merchant account, please visit https://merchantservices.chase.ca/en/support or call 1-866-833-8182 to speak with a Sales Representative.

Getting Started

To use Chase POS, you will need to first set up an account with Chase® Merchant Services. To speak with a Sales Representative, please call 1-866-833-8182.

Once your account has been created, you will need to **validate your email address** by clicking on the link within the welcome email.

You will be asked to set the following to protect your account:

Password

Your password will be used anytime you sign into the Merchant Portal or the Chase POS Terminal application. The temporary password will be sent to you via email that you will need when setting up the password.

MFA (Multi-Factor Authentication) Preference

You will also need to choose your MFA preference. You can choose between

- SMS (your phone number) and
- Authenticator App (Google authenticator, Microsoft authenticator, …)

Signing In

Your Chase Merchant account is secured using your registered email address and password.

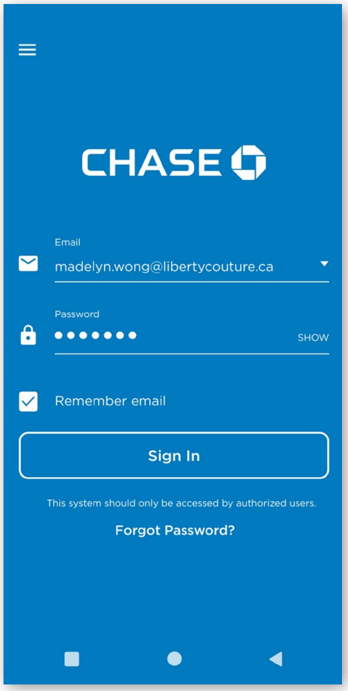
When signing into a Chase POS terminal or the Merchant Portal, you may also be required to enter an OTP (one time password). This is a 6-digit code either sent to your mobile phone number as an SMS or it can be found in your authenticator app. Whether it's SMS or an Authenticator app depends on the MFA (Multi-Factor Authentication) preference that you chose during registration.

To sign in to the app:

1. Power on your terminal. The Chase POS login screen will appear after a few moments.

2. Enter your **Email Address** and **Password** and click the **Sign In** button.

When the **Remember email** check box is selected, your email address is pre-populated the next time you sign in from the same device.



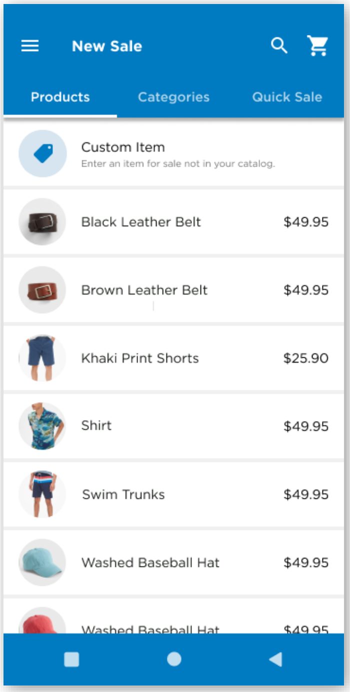
Forgot your password?

You can reset your password yourself using the Chase POS terminal, via the Merchant Portal at mychase.ca, or call Merchant Support at 1-800-265-5158.

Performing a Sale

Now that you are logged in, you are ready to accept Debit & Credit transactions.

New Sale – Building your Cart



There are three ways to add items to your cart.

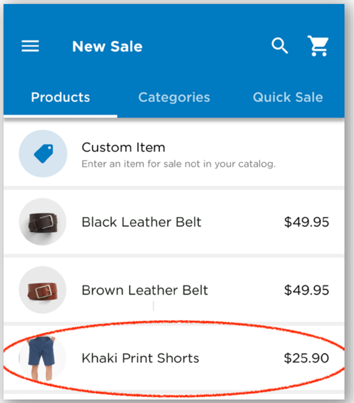
1. Add a catalogue items through the products or categories tab.
2. Add a custom item through the products or categories tab.
3. Add a custom item using the Quick Sale keypad.

Add a Catalogue Item

You can add one or more existing products from your catalogue to quickly build your cart.

To manage your products and services, see *Managing Your Product Catalogue*.

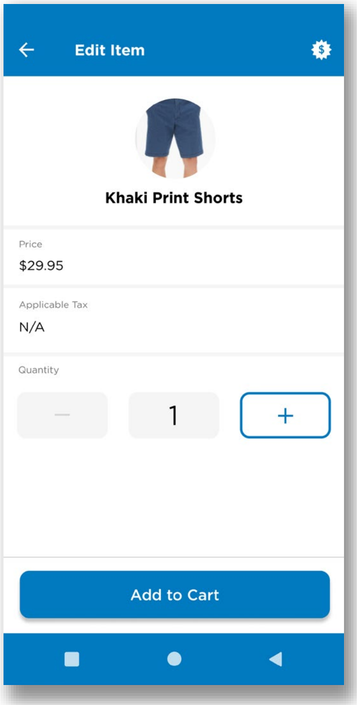
1. Select an item from the **products** tab.



2. Adjust the quantity of items you want to add to your cart.

3. Press **Add to Cart**.

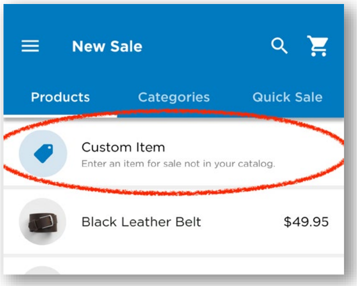
4. Your item has been added your cart and you can continue to add to your cart or press subtotal to review your order and accept payment Accepting Payment below.



Add a Custom Item

Custom Item will allow you to define a custom item. This is generally useful for adding custom-prices products or services.

1. Select **Custom Item** from the new sale screen.



2. Enter a product or service name.

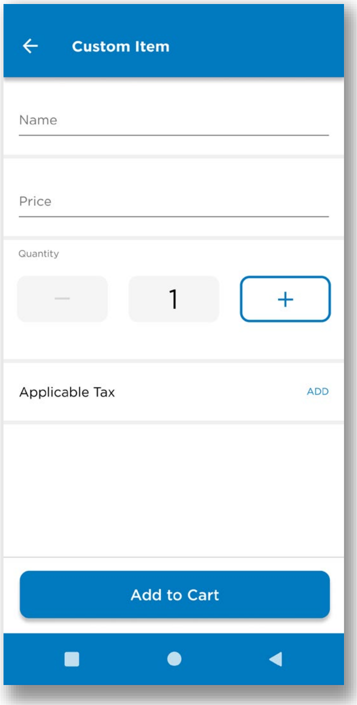
3. Specify a price for the product or service.

4. Choose Quantity.

5. View Applicable Tax to choose a tax or taxes.

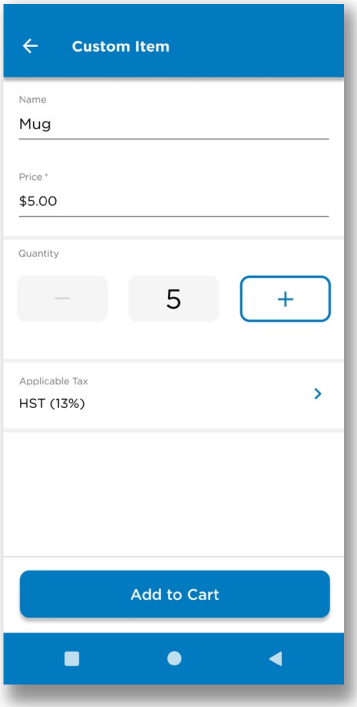
6. Check "Tax Included in Price" if you'd like the tax to be included in the price.

   For example, if you'd like to sell something for a total of $10.00 with tax included, but don't want to calculate what the base price is, the app can do it for you. You can enter $10, check "Tax Included in Price", choose the applicable tax and the app will calculate the base price and it will show it on the next screen (cart).



7. Press "Add to Cart" button.

8. Your item has been added your cart and you can continue to add to your cart or press subtotal to review your order and accept payment. See *Accepting Payment* below.

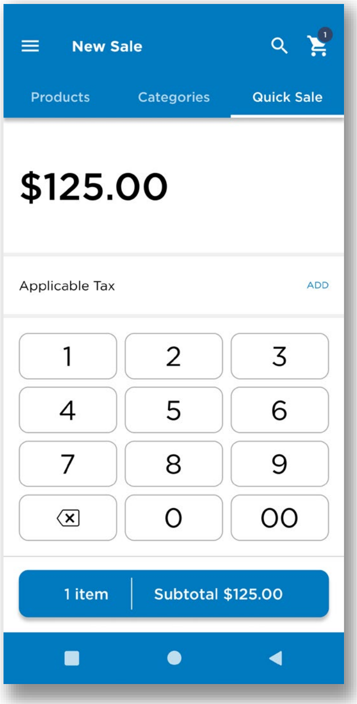


Add a Quick Sale

If you don't want to all aspects of your custom item, you use the Quick Sale keypad to quickly enter a dollar value amount.

If you're using an existing invoicing system, you can add a memo to the sale with your invoice number for easy reconciliation.

Select New Sale in the main menu or the $ icon in the top corner of the screen to display the list of the products you have available for sale.



1. Select the **Quick Sale** tab.

2. Enter the amount using the keypad. An item will be added to your cart as you type.

3. Optionally, tap the taxes button to add or change the taxes applied. These taxes will be remembered the next time you make Quick Sale.

4. Press the **Subtotal** button to review your sale and select your payment method.

Adding a “Memo” to your transaction

Once in the **Cart** screen, you’ll able to add a **Memo** (a note) to your transaction. This note will appear in your transaction details and in your receipt after you complete the transaction.

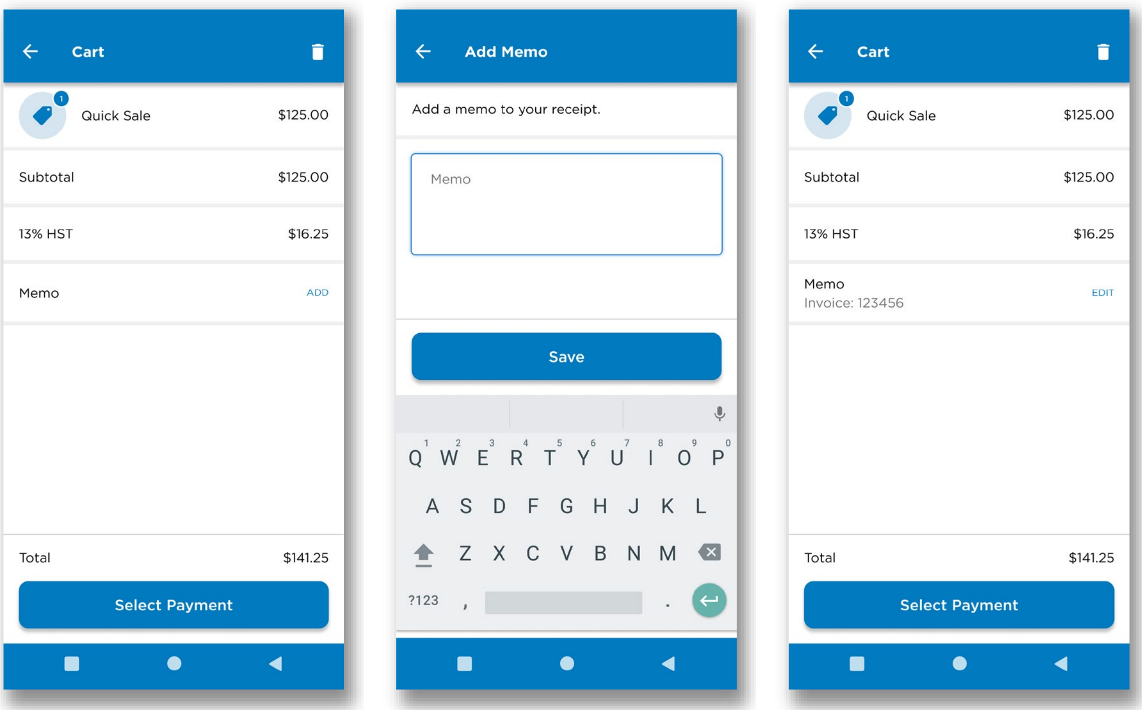
This custom note may contain any information that might be useful to you or to your customer.

1. Press **ADD** next to Memo.

2. Type in the content of your memo and press “Save”.

3. Once the memo is added, it will appear in the cart screen below the cart items. In the screenshot you can see “This is a sample memo.”

If you’d like to edit the memo, you can do so by pressing **EDIT** next to the **Memo.**



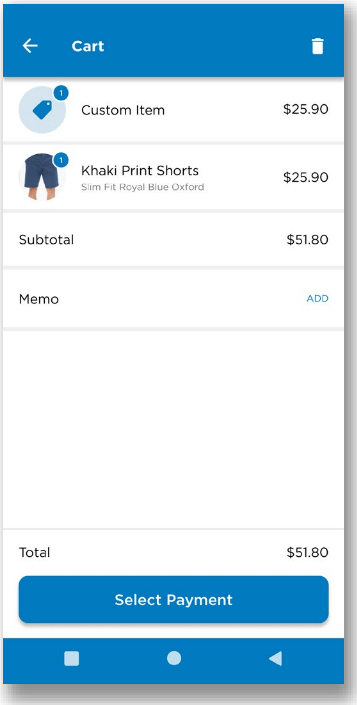
Accepting Payment

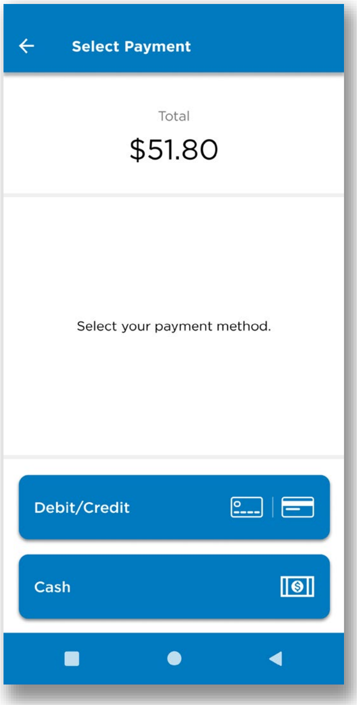
The quantities for sale can be adjusted by selecting the item and modifying the quantity. To remove an item from the cart, either select 0 quantity after selecting the item or slide the item to the left and select Delete.

You can add a note to your transaction by pressing **ADD** next to **Memo**. See *Memo* for more details.

Select the **payment method** for your sale:

- 1. Cash
- 2. Debit/Credit





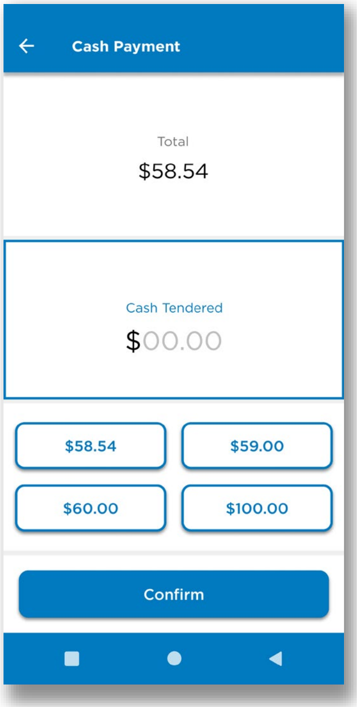
1. Cash

Selecting Cash will allow you to record your payment. The merchant will be responsible for collecting cash and dispensing the correct change.

The screen allows you to type in the amount tendered by the customer and it will display the change due.

Alternatively, the app offers four prepopulated “quick amounts”. If the customer happens to give exactly one of the four amounts, you can press this “quick amount” to save you from typing the amount using the keypad below.

Once submitted the amount of change to return will be indicated on the Payment Complete Screen.

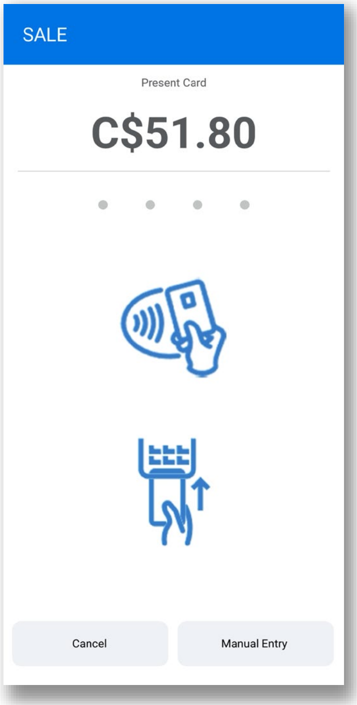


2. Debit/Credit

Selecting Debit/Credit will allow you to accept a Debit or Credit card payment.

Your terminal supports tap, insert, and swipe entry as well as manual entry (depending on what entry methods have been made available to your business).

If tipping has been enabled for your business the customer will be prompted with your predefined tip amounts or be allowed to enter a custom tip amount.

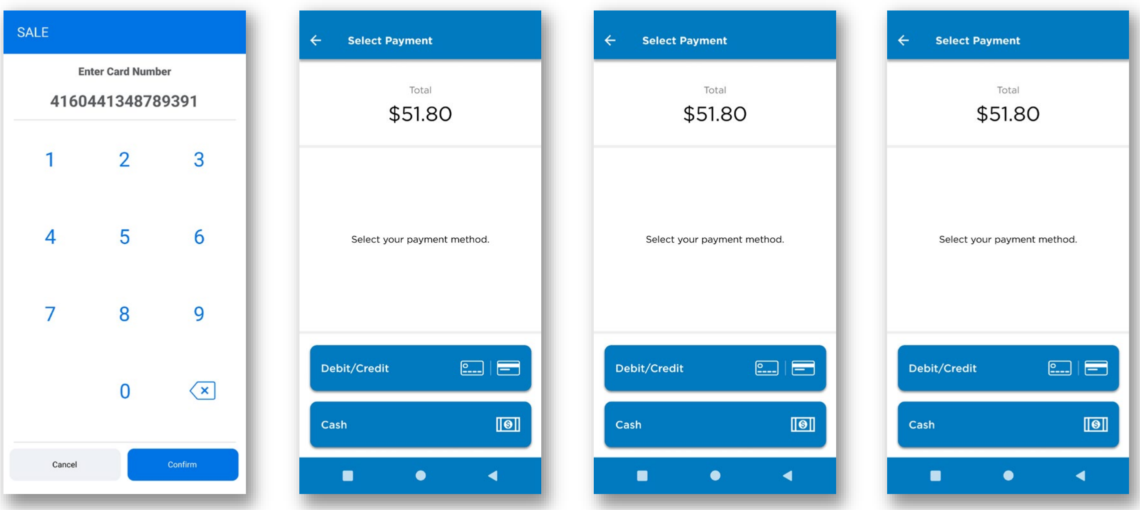


Manual Entry

If the card is physically present, but cannot be read by the card reader, you can manually enter the cart information to accept a payment.

You will have to provide the following:

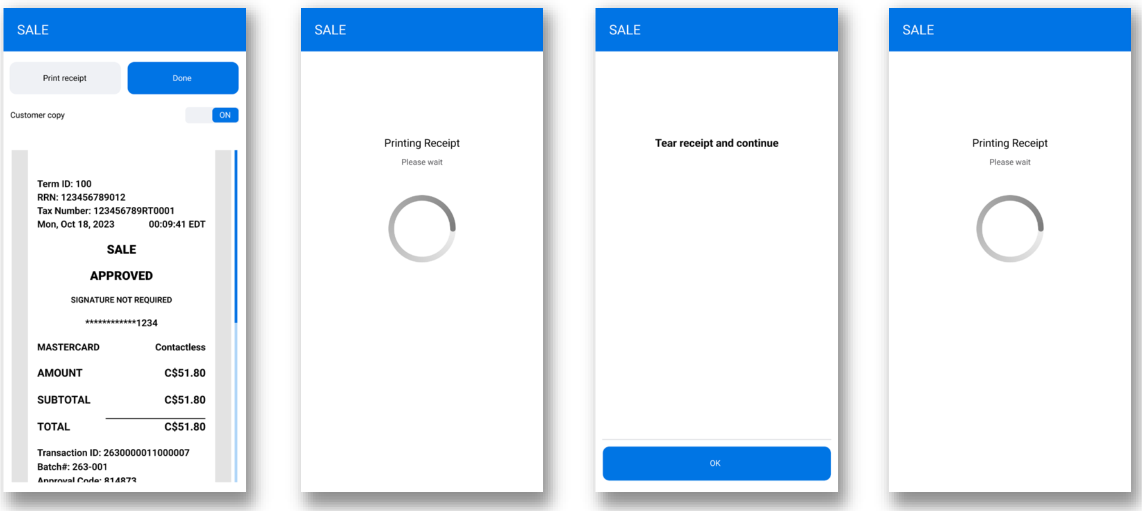
- Credit Card Number
- Credit Card Expiry
- Postal Code
- Street Address



Printing receipts

Once the transaction is approved the customer will be prompted to return the terminal to the merchant. The terminal will then print the merchant copy of the transaction receipt.

Note: This receipt is not itemized and does not contain an order number. For an itemized copy of the receipt please see Digital Receipts.

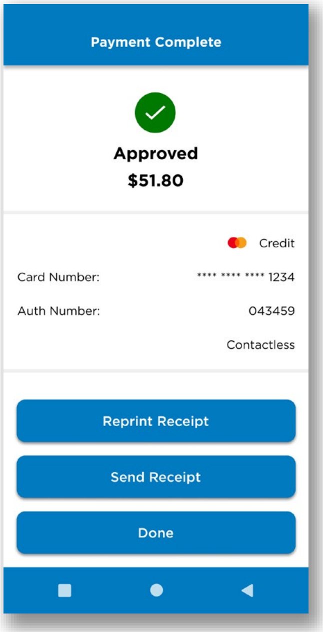


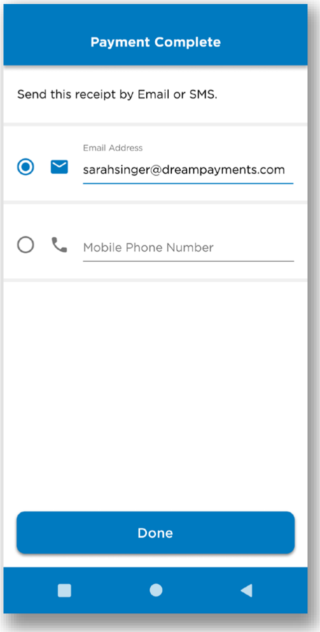
Sending a Digital Receipt

Once the transaction receipts have been printed a summary page will be displayed.

Choose to send a receipt to the customer via email and/or a mobile number. Otherwise, continue without sending a receipt.

You can also reprint your physical receipt if needed.





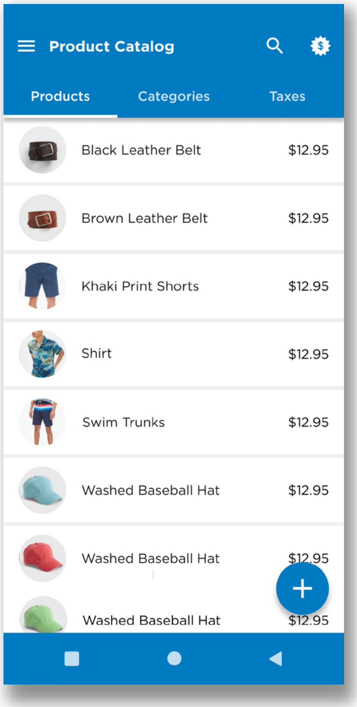
Managing Your Product Catalogue

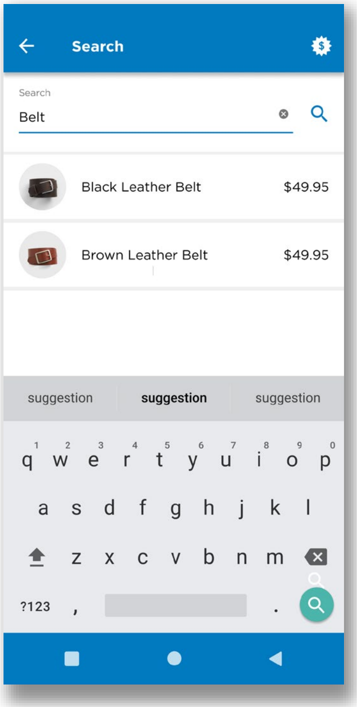
You can manage your commonly sold products and services in Chase POS by accessing your product catalogue.

If your business has **staff users**, they will be able to access and sell products from your catalogue but will not be able to make changes to it.

Searching the Product Catalogue

The products in the catalogue are sorted by name in alphabetical order. If you are having trouble finding a product, you can click on the **Search** icon in the top right part of the screen to search.





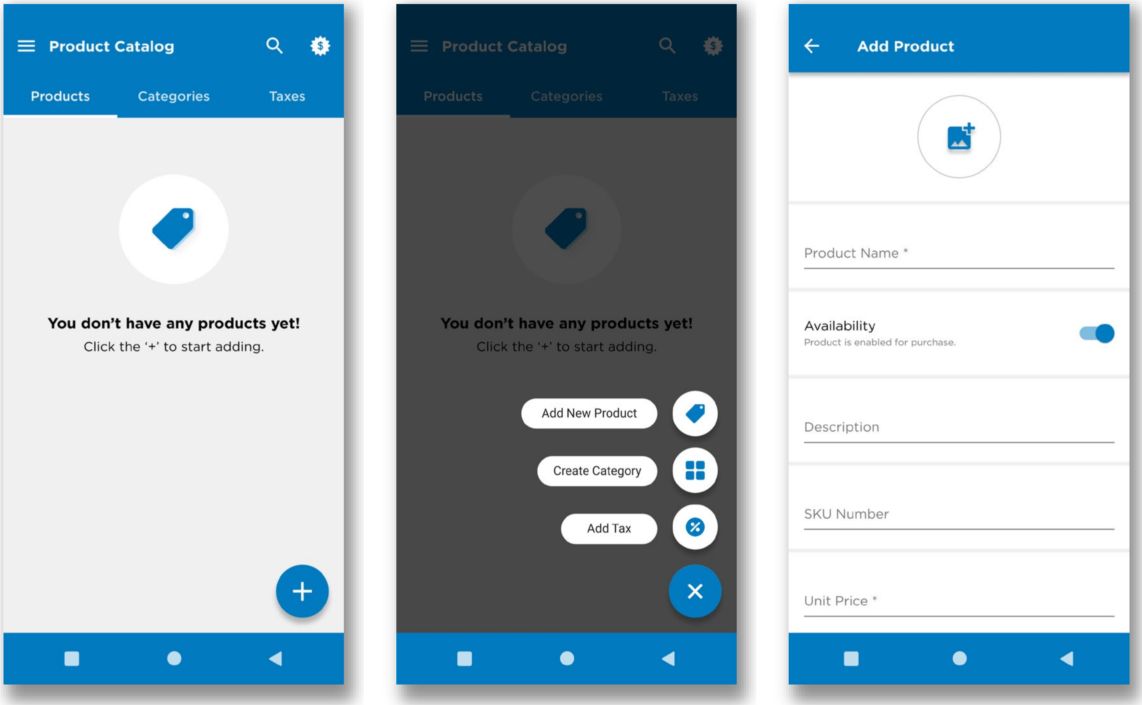
Adding a new Product

To add a new product:

1. Go to **Product Catalogue** from the menu button.

2. Press **+** icon and select **Add New Product**. Refer to the following sections below for more details:

   - *Applying a Tax*
   - *Assigning a Product to Categories*
   - *Adding an Image*



3. Once you have defined the values for your product, press **Save** to add it to your Catalogue.

Applying a Tax

You can add a tax to your new product.

To apply a tax:

1. Go to **Product Catalogue** from the menu button.
2. Select the product or service you would like to apply tax for.
3. Select **Taxes** to display a list of taxes configured for your business. See *Managing Taxes* for more information.
4. Select the applicable taxes, and press **Done** to apply it to the product.

Assigning a Product to Categories

To help organize your catalogue, you can assign products to categories.

To assign a product to a category:

1. Go to **Product Catalogue** from the menu button.
2. Select the product or service you would like to assign a category to.
3. Select **Categories** to display a list of categories configured for your merchant account. See *Managing Categories* for more information.
4. Select the applicable categories, and press **Done** to apply it to the product.

Adding an Image

You can add an image to your new product. The image will appear in your product catalogue.

To add an image:

1. Go to **Product Catalogue** from the menu button.

2. Select the product or service you would like to add an image to.

3. Press the image icon or current image. You will see 2 options:

   - **Capture Image**: Use your Chase POS terminal's camera to take a picture of the product.

   - **Choose Image**: Select an image from the gallery on your Chase POS terminal.

Note: **Remove Image** will be displayed if an image is present.

Editing a Product

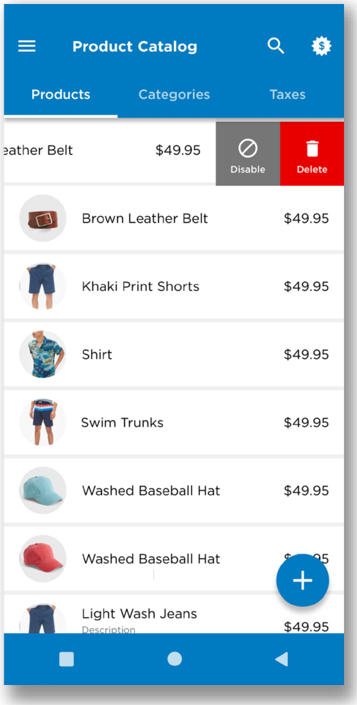
You may edit a product by selecting it from your product catalogue.

The view will be similar to adding a product. However, you will have the option to Enable/Disable a product.

You may wish to **disable** a product if it is not currently available for sale. Disabling a product will hide it from the list when performing a catalogue sale.

Deleting a Product

You can delete a product to remove it from the catalogue.



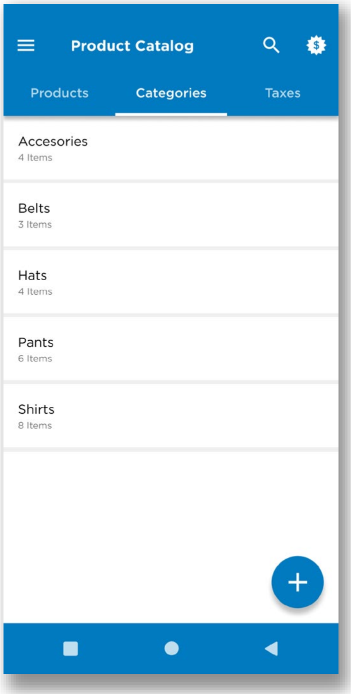
To delete a product:

1. Go to **Product Catalogue** from the menu button.

2. Slide the product to the left to reveal the delete button. Press Delete to remove it from the catalogue.

   OR Select the product you wish to Delete. Press the **Delete** button at the bottom.

Managing Categories



Categories allow you to organize your catalogue more efficiently. You can manage your categories from the Product Catalogue page.

To manage your categories:

1. Go to **Product Catalogue** from the menu button.

2. Press **Categories** tab to display a list of existing categories and the option to manage categories.

Adding a Category

You can add a new category to help group and organize your products.

To add a category:

1. Press **+**.

2. Choose **Create Category**

3. Enter a **Category Name**, choose the **Associated product(s)** and press **Save**.

Editing a Category

You can edit a category you have previously set up including the category name and products the category applies to.

To edit a category:

1. Select a category in the list to edit it.

2. Update the **Category Name** or choose the **Associated product(s)** and press **Save**.

Deleting a Category

Deleting a category is similar to deleting products.

To delete a category:

1. Swipe the category to the left to reveal the **Delete** button, or select the category you wish to delete and press **Delete.**

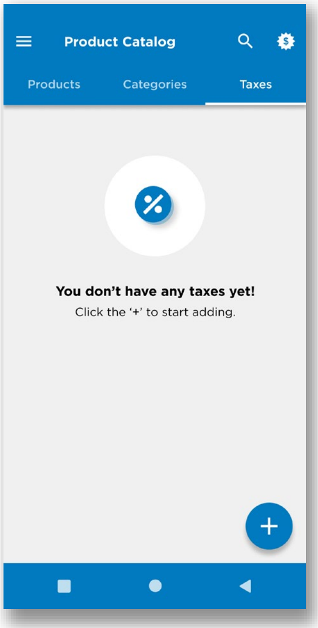
Managing Taxes

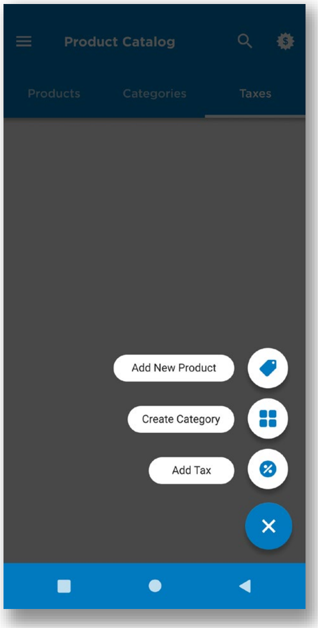
Adding a Tax

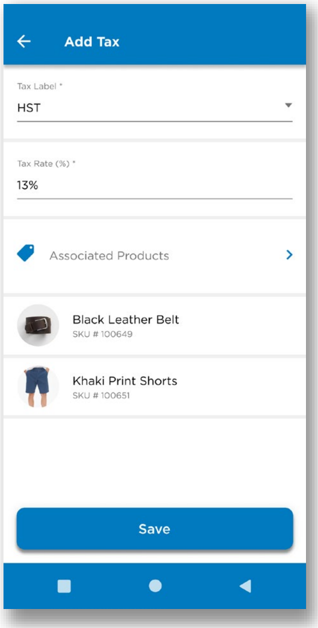
You can add taxes to your products.

To add a tax:

1. Go to **Product Catalogue** from the main menu.
2. Select the **Taxes** tab.
3. Press the **+** button and select **Add Tax** to display the Add Tax screen.
4. Select the **Tax Label** (GST/HST/PST/QST), enter the **Tax Rate**, choose the **Associated Products** and press **Save**.

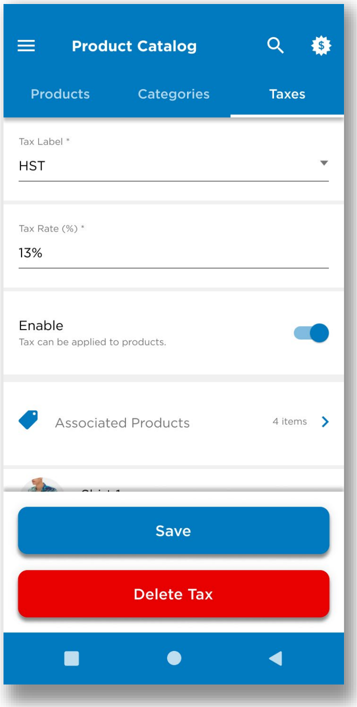






Editing a Tax

You can edit a tax you have previously set up.



To edit a tax:

1. Go to **Product Catalogue** from the main menu.

2. Select the **Taxes** tab.

3. Select the tax you would like to edit.

3. Update the **Tax Label**, **Tax Rate**, or **Associated Products** and press **Save**.

Disabling a Tax

You can temporarily disable a tax.

To disable a tax:

1. Go to **Product Catalogue** from the main menu.

2. Select the **Taxes** tab.

3. Select the tax you would like to disable.

3. Switch the **Enable** toggle off and press **Save**.

Deleting a Tax

You can permanently delete a tax.

To delete a tax:

1. Go to **Product Catalogue** from the main menu.
2. Select the **Taxes** tab.
3. Select the tax you would like to disable.
4. Press **Delete** and confirm the deletion.

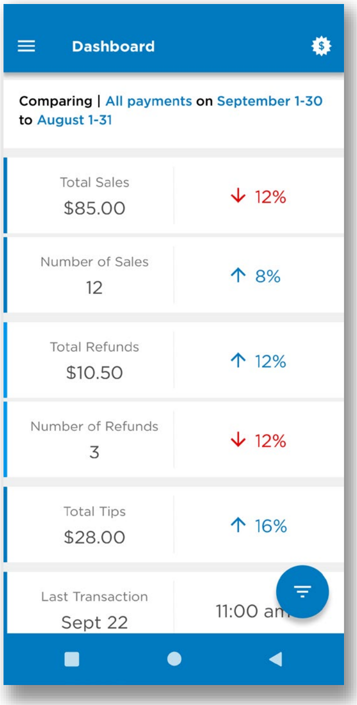
Reviewing Sales

With Chase POS, you can track daily sales statistics performed by you or your staff.

The **Dashboard** provides a real-time summary of your sales, including total sales, refunds, taxes and tips. You can view the information by payment type or by the staff member that conducted the transaction.

To access the Dashboard:

1. Click on **Dashboard** from the menu button. The transaction summary is displayed.



To modify the Dashboard:

1. Click on the **Filters** button in the bottom right corner.

2. Set the desired options in the user view, payment method and the date range sections.

2. Click **Apply Filters**

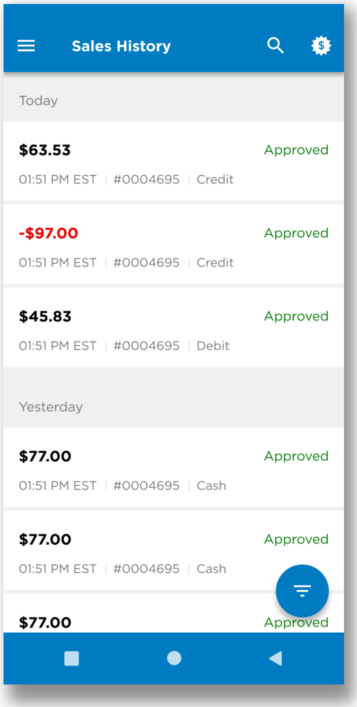
Need to find a past transaction? You can track your historical transactions from the past 18 months.

The **Sales History** allows you to review a list of your previous sales. You can click on a transaction to see more detail and resend a receipt.

When you need to find a specific transaction, you can browse by date the transaction was performed.

To access your Sales History:

1. Click on **Sales History** from the menu button.



Payment Type:	Cash, Credit or Debit
Order Number:	Unique order number for the transaction
Time:	Time the transaction was performed
Amount:	Total amount for the transaction including taxes and tips. Voids and refunds are displayed in red.

Processing a Voids and Refunds

You will encounter situations where transactions need to be reversed or corrected. This can be due to various reasons such as a customer changing their mind, a cashier error, or the return of defective items.

In such cases you can void or refund a transaction.

Voiding a transaction cancels the transaction before the day's sales are finalized and processed. This effectively erases the transaction as if it never happened. You can void transactions on the same day as the original sale. The entire sale will be reversed, you cannot void individual items.

Refunding a transaction returns funds to the customer after the sale has been completed. You can refund a transaction after the original sale has been processed, typically on the next day. When you process a refund, you can choose to refund individual items or the entire sale.

Note: There is inherent risk of fraud when processing refunds to a card other than the original card used to make the order. It is the responsibility of the owner and their staff to confirm the identity of the cardholder.

Note: Refunds are protected by User PINs which are known only to the owner account holder. As an owner it is your responsibility to communicate User PINs securely and to monitor your refunds for possible fraud.

To Perform a Void:

1. Click on **Sales History** from the menu button.
2. Select the original transaction from the list or find it using search.
3. Select **Void** at the bottom of the sale detail screen.
4. Review the transaction and select **Void $XX.XX.**

5. The void will be processed automatically, no need for the customer to present their card again.

6. Optionally print the receipt.

7. Optionally send a digital receipt.

8. Press **Done** to complete the transaction.

To Perform a Refund:

1. Click on **Sales History** from the menu button.

2. Select the original transaction from the list or find it using search.

3. Select **Refund** at the bottom of the sale detail screen. **Note:** Refunds are only available on the next day after a transaction was made.

4. Select one or more items (and optionally the tip) to refund and confirm the subtotal before taxes.

5. Review the transaction and confirm the total refund amount with taxes included by pressing the **Refund $XX.XX** button.

6. Follow the instructions on the terminal to process the transaction.

7. Optionally print the receipt.

8. Optionally send a digital receipt.

9. Press **Done** to complete the transaction.

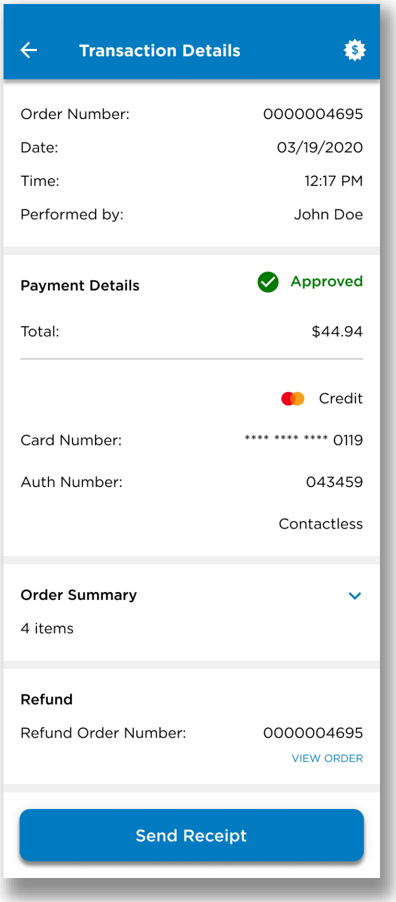
Resending a Receipt

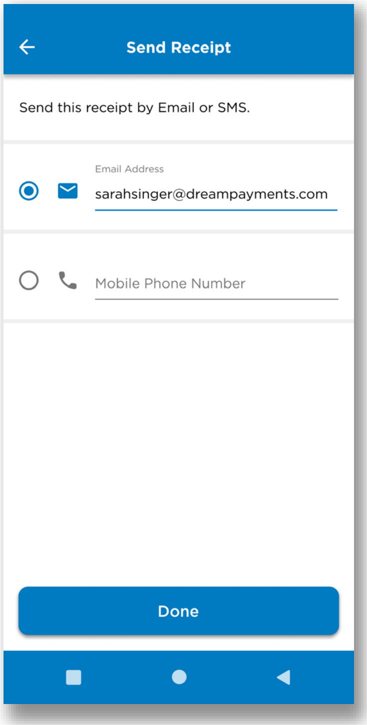
Occasionally, a customer may request that you send them a receipt from a past transaction. You can find the customer's receipt from the **Sales History** screen.

You can resend the PDF receipt to a customer's email address or mobile number. The receipt is attached when sending to an email address. A secure link is provided to download the receipt when sending to a mobile number.

To resend a receipt:

1. Go to **Sales History** from the menu button.
2. Browse for the particular transaction you would like to send a receipt for.
3. Press on the transaction to view the details.
4. Enter the customer's **email address** or **mobile number** and press **Send**.





Updating Your Account Profile

To change the name associated to your account, please call Merchant Support at 1-800-265-5158.

Changing Your Mobile Number

Your mobile number can be used for two-factor authentication when signing in.

To change your mobile number:

1. Go to **Settings** > **Personal Profile** from the main menu.
2. Press **EDIT** next to the mobile number to change it.
3. Enter your new **Mobile Number** and press **Save**.

Changing Your Language

Chase POS can be viewed in either English or French.

To change your language:

1. Go to **Settings -> Personal Profile** from the main menu.
2. Press **EDIT** next to the Language preference to change the language.
3. Select **English** or **French** and press **Save**.

Updating Your Security Settings

Changing Your Password

Your password is required to sign in to a Chase POS terminal and Merchant Portal.

To change your password:

4. Go to **Settings** > **Personal Profile** from the main menu.

2. Press **EDIT** next to the Password to change the password.

5. Enter your **Current Password** and **New Password** and press **Save**.

Changing Your Verification Preference

Your Verification Preference, set up when you first signed in, is used as an additional security check to confirm your identity. The Verification Preference is also referred to as an MFA (Multi Factor Authentication) preference.

To change your Verification Preference:

1. Go to **Settings** > **Personal Profile** from the main menu.

2. Press **EDIT** next to the MFA Preference to change the verification preference.

3. Choose the new Verification Preference (either “SMS” or “Authenticator App”) and press **Next**.

4. Follow the steps and press **Save**.

Managing User PINs

Each user is assigned a 6-digit user PIN which allows them to perform refunds. Only the owner can view and reset user PINs. As such it is the Owner's responsibility to securely communicate user PINs to users that they feel should be able to perform refunds.

User PINs can only be managed through the Merchant Portal by the owner account. Please refer to the Merchant Portal User Guide for more information.

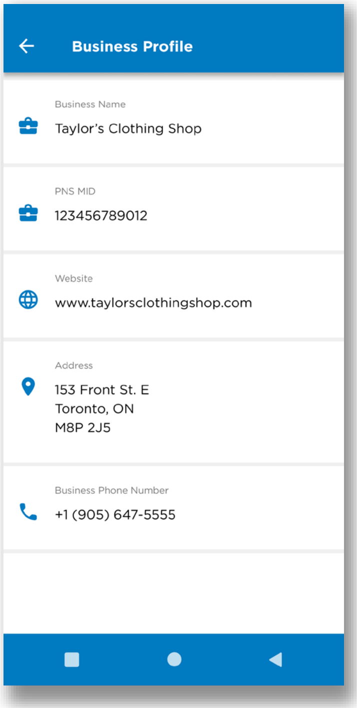
Updating Your Merchant Settings

Viewing Your Merchant Profile

To change the name or address associated to your merchant profile, please call Merchant Support at 1-800-265-5158.

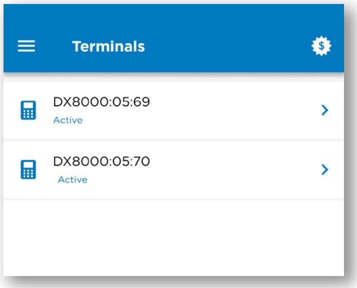
To view your merchant profile:

1. Go to **Settings** > **Business Profile** from the main menu.



Viewing Your Terminals

The hardware screen lists the terminals associated to your merchant account, including information such as: name, serial number and status.



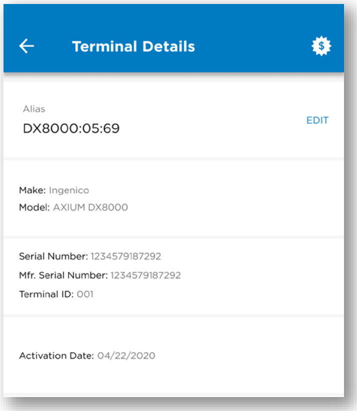
To view your terminals:

1. Go to **Hardware** from the **main menu**.

Updating a Terminal's Name

You can assign a user-friendly name, called an Alias to each Terminal for easier identification.

To update a Terminal's name:



1. Go to **Hardware** from the **main menu**.

2. Choose the terminal you would like to update the name for.

3. Press **EDIT** next to the Alias

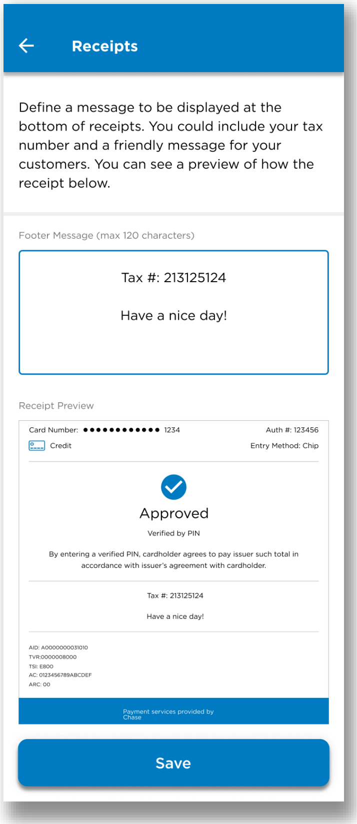
3. Enter the new **Alias** (Name) and press **Save**.

Replacing a Terminal

To replace a terminal call Merchant Support at 1-800-265-5158 so they can remove the terminal from your account.

Customizing Your Receipts

You may add a custom message to the bottom of your receipts. This is a great place to include a message to your customers.



To enter your message:

1. Go to **Settings** > **Receipt** from the main menu.
2. Type your message.
3. Preview your message below.
4. Press **Save**.

Tip

The custom message is a good place to display your business tax number.

[1] Chase POS is available to Canadian Merchants accepting transactions within Canada only. In addition, all applicable processing fees outlined in the merchant services contract with Chase® Merchant Services will be assessed for all transactions initiated through the app.

[2] All merchants are required to complete a more detailed application, and agree to terms and conditions, at the time of enrollment. All merchants are subject to credit approval.