



Chase Mobile Checkout-PLUS

Merchant Portal User Guide

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

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Welcome to Chase Mobile Checkout-PLUS

Chase Mobile Checkout-PLUS¹ (CMC-PLUS) allows you to accept credit and debit card payments² with your Apple smartphone or tablet wherever your business takes you in Canada.

All you need is a Bluetooth enabled mobile device with the CMC-PLUS app, our supported card reader, and a merchant account with Chase[®] Merchant Services to experience the benefits of our newest mobile payment processing solution.

This user guide will introduce you to the Merchant Portal, where you will be able to manage your CMC-PLUS account to view reports and analytics, and track your sales.

Don't have an account?



If you do not have a CMC-PLUS account, please visit <https://merchantservices.chase.ca/en/support> or call 1-877-552-5533 to speak with a Sales Representative.

Getting Started

In order to use CMC-PLUS, you will need to first set up an account with Chase® Merchant Services. To speak with a sales representative, please call 1-877-552-5533.

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

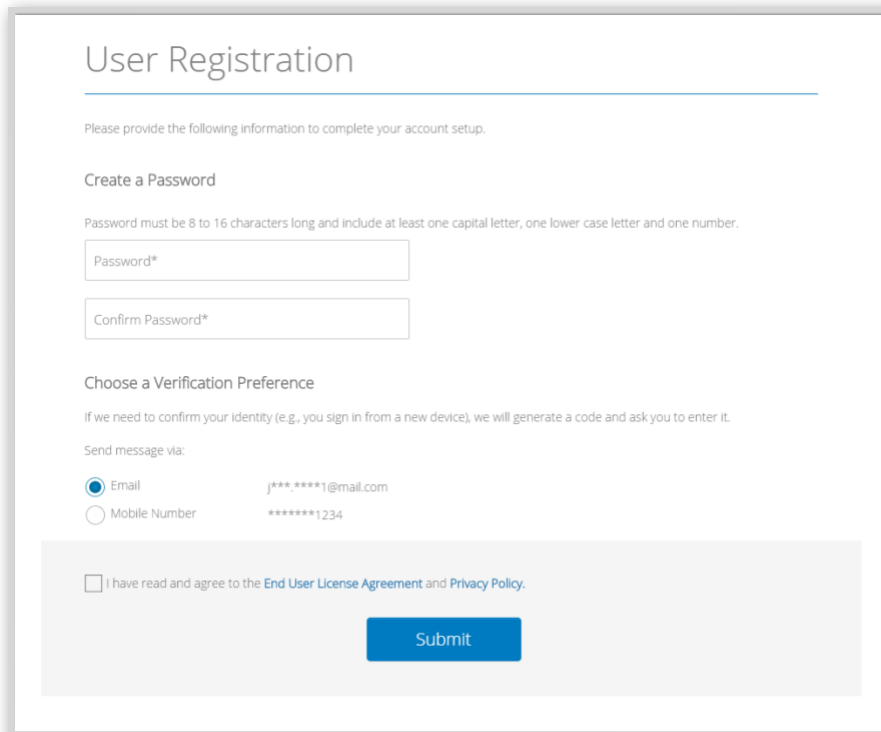
You will be asked to set the following to protect your account:

- **Password**

Your password will be used anytime you sign in to the Merchant Portal or CMC-PLUS Mobile App.

- **Verification Preference (two-factor authentication)**

When signing in from a new device or web browser, you will be asked to enter a temporary verification code. The verification code will be sent to your email address or mobile number based on your preference selection.



The screenshot shows a 'User Registration' form with the following sections:

- User Registration**: Title of the form.
- Please provide the following information to complete your account setup.**: Instructional text.
- Create a Password**: Section for password creation.
 - Instruction: Password must be 8 to 16 characters long and include at least one capital letter, one lower case letter and one number.
 - Input fields: 'Password*' and 'Confirm Password*'.
- Choose a Verification Preference**: Section for selecting a verification method.
 - Instruction: If we need to confirm your identity (e.g., you sign in from a new device), we will generate a code and ask you to enter it.
 - Text: Send message via:
 - Options:
 - Email: j***.****1@mail.com
 - Mobile Number: *****1234
- Agreement**: I have read and agree to the [End User License Agreement](#) and [Privacy Policy](#).
- Submit**: A blue button to complete the registration.

Signing In

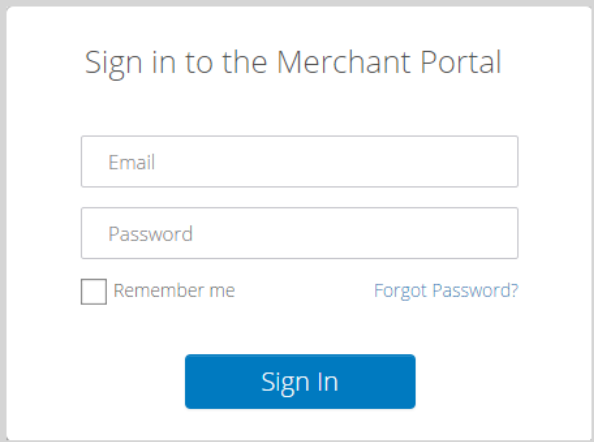
Your CMC-PLUS account is secured using your registered email address and password.

When signing into the Merchant Portal or Mobile App, you may also be required to enter a (two-factor authentication) code sent to your email address or mobile phone number.

To access the Merchant Portal:

1. Go to <https://cmcplus.ca>
2. Click the **SIGN IN** button.
3. Enter your **Email Address** and **Password** and click **Sign In**.

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



The screenshot shows a sign-in form titled "Sign in to the Merchant Portal". It contains two input fields: "Email" and "Password". Below the "Password" field is a checkbox labeled "Remember me" and a link labeled "Forgot Password?". At the bottom of the form is a blue button labeled "Sign In".

Forgot your password?



You can reset your password yourself on the CMC-PLUS Mobile App or call Merchant Support at 1-800-507-0782.

Setting your PIN

If this is your first time signing in, you will be prompted to set your 4 to 6 digit Authorization PIN.

Your Authorization PIN is used as an additional security check if your password was incorrectly entered multiple times during sign in.

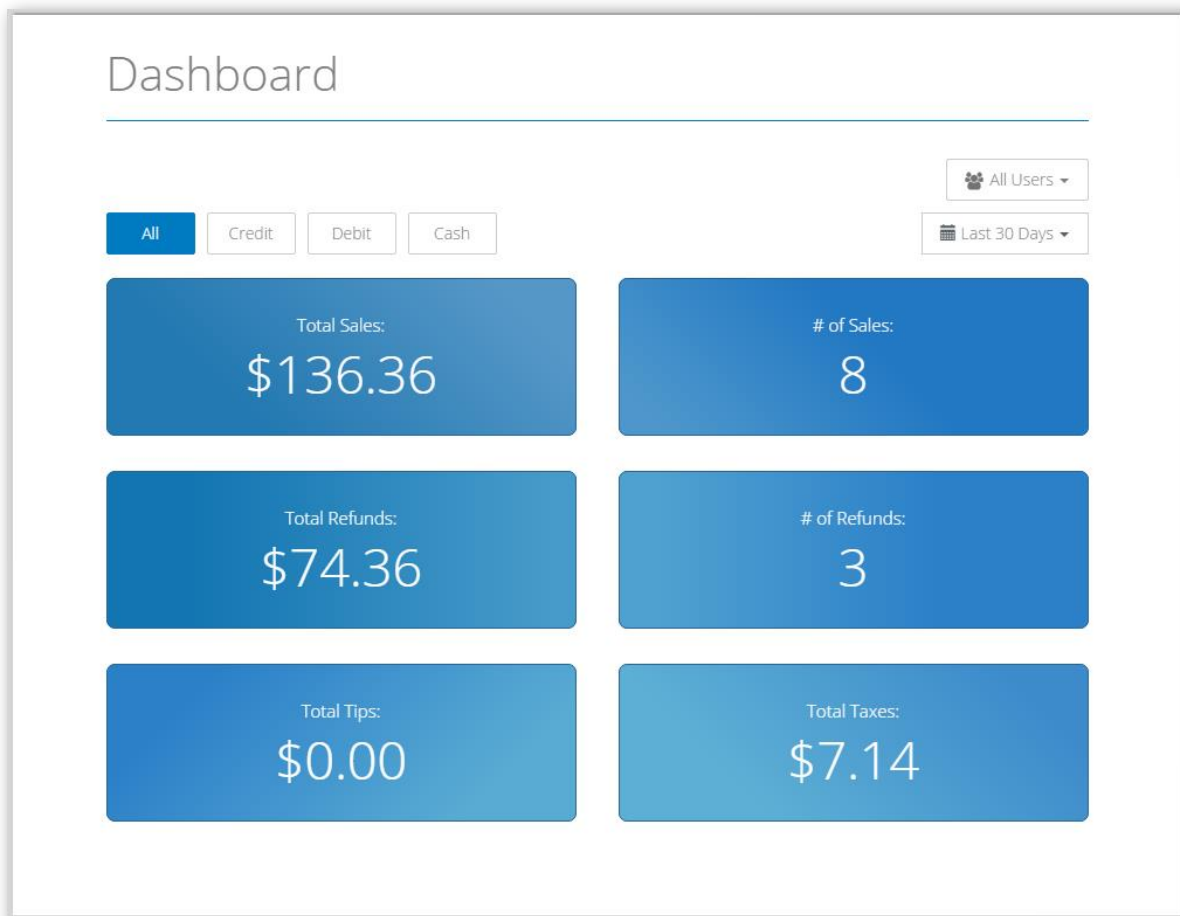
Reviewing Sales

With CMC-PLUS, 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 may view the information by payment type, date range or staff member that conducted the transaction.

To access the Dashboard:

1. Click on the **Dashboard** menu button.



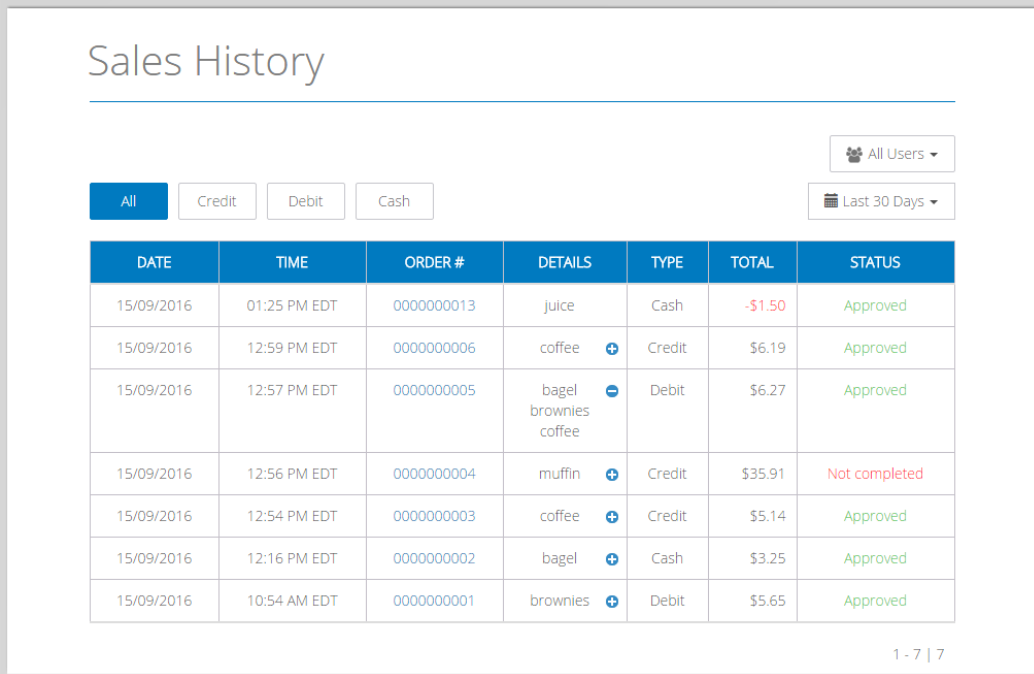
Need to find a past transaction? You can track your historical transactions from the past 18 months.

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

When you need to find a specific transaction, you are able to browse by payment type, date range or staff member that conducted that transaction.

To access your Sales History:

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



The screenshot shows the 'Sales History' interface. At the top, there is a title 'Sales History' and a horizontal line. Below the title, there are filters: 'All Users' (with a dropdown arrow), 'All' (selected), 'Credit', 'Debit', and 'Cash' (all in buttons), and 'Last 30 Days' (with a calendar icon and dropdown arrow). The main content is a table with the following data:

DATE	TIME	ORDER #	DETAILS	TYPE	TOTAL	STATUS
15/09/2016	01:25 PM EDT	000000013	juice	Cash	-\$1.50	Approved
15/09/2016	12:59 PM EDT	000000006	coffee +	Credit	\$6.19	Approved
15/09/2016	12:57 PM EDT	000000005	bagel brownies coffee -	Debit	\$6.27	Approved
15/09/2016	12:56 PM EDT	000000004	muffin +	Credit	\$35.91	Not completed
15/09/2016	12:54 PM EDT	000000003	coffee +	Credit	\$5.14	Approved
15/09/2016	12:16 PM EDT	000000002	bagel +	Cash	\$3.25	Approved
15/09/2016	10:54 AM EDT	000000001	brownies +	Debit	\$5.65	Approved

At the bottom right of the table area, there is a page indicator '1 - 7 | 7'.

Details: Lists the products sold. Pressing the “+” icon reveals all products.

Total: Displays the total of the transaction including taxes and tips. Voids and refunds are displayed in red as a negative amount.

Status: Indicates whether the payment has been accepted (Approved).

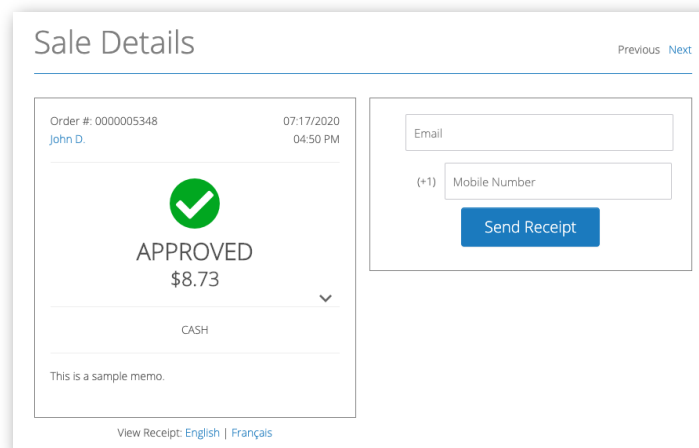
Resending a Receipt

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. Click on the **Sales History** menu button.
2. Browse for the particular transaction you would like to send a receipt for.
3. Click on the **ORDER #** of the transaction to view the details.
4. Enter the customer's **email address** and/or **mobile number** and click the **Send Receipt** button.



The screenshot shows the 'Sale Details' interface. On the left, it displays 'Order #: 000005348' with the customer name 'John D.' below it. To the right, the date and time are '07:17/2020 04:50 PM'. A large green checkmark icon is centered above the text 'APPROVED \$8.73'. Below this, the payment method is listed as 'CASH'. At the bottom of this section, it says 'This is a sample memo.' and 'View Receipt: English | Français'. On the right side of the screen, there is a form with two input fields: 'Email' and '(+) Mobile Number'. A blue 'Send Receipt' button is positioned below the mobile number field. 'Previous' and 'Next' navigation links are visible in the top right corner.

Tip



If a receipt has previously been sent, the customer's email and/or mobile number will be pre-populated for easier entry but masked for privacy.

Downloading a Receipt

If you wish to save a copy of a transaction receipt, you can download a PDF copy on the **Sales Details** screen.

To download a receipt:

1. Click on the **Sales History** menu button.
2. Browse for the particular transaction you would like to download a receipt for.
3. Click on the **ORDER #** of the transaction to view the details.
4. Click on the English or French links at the bottom to view the receipts.

The screenshot shows the 'Sale Details' interface. At the top left, it displays 'Order #: 0000005348' and 'John D.' with a blue checkmark. To the right, it shows the date and time '07:17/2020 04:50 PM'. The main content area features a large green checkmark icon, the word 'APPROVED' in bold, and the amount '\$8.73'. Below this, it indicates 'CASH' and a small downward arrow. At the bottom of this section, it says 'This is a sample memo.' To the right of the main content is a form with two input fields: 'Email' and '(+) Mobile Number'. Below these fields is a blue button labeled 'Send Receipt'. At the bottom of the screen, there are links for 'View Receipt: English | Français'. In the top right corner, there are links for 'Previous' and 'Next'.

Receipt language



The receipt is downloaded in the same language you set for the Merchant Portal (English or French). See [Changing Your Language](#).

Viewing Reports

You can download detailed analytics and reports for your business. These reports will allow you to accurately track your transactions, as well as products and services your business has sold.

The reporting feature provides real-time reporting and analytics to track and analyze your sales.

To run a report:

1. Click on the **Reports** menu button.
2. Enter the **From** and **To** dates for the report you would like to run and click on the **View Report** button.

The screenshot displays a 'Reports' section with two report options side-by-side. Each option has a title, 'From' and 'To' date input fields with calendar icons, and a 'View Report' button.

Report Title	From Date Field	To Date Field	Action Button
Detailed Transactions Report	From DD/MM/YYYY	To DD/MM/YYYY	View Report
Product Catalogue Sales Report	From DD/MM/YYYY	To DD/MM/YYYY	View Report

Detailed Transactions Report

The Detailed Transactions Report provides a list of sales for a given time period. The report includes details of each transaction such as payment method, geolocation, taxes, tips and receipt delivery.

Product Catalogue Sales Report

The Product Catalogue Sales Report provides sales volume grouped by product for a given time period.

Exporting a Report to PDF or Excel

You can export the data for any report to PDF or Excel.

To export a report:

1. Click on the **Reports** menu button.
2. Enter the **From** and **To** dates for the report you would like to run and click on the **View Report** button.
3. Click on the **Export Data** button in the top left to display the **Export Report** window.
4. Choose either **PDF** or **XLSX** (Excel) from the **Export Format** dropdown and click the **OK** button.



Showing page 1 of 1

Report Date: 2018-12-06 22:18 UTC
Report Name: Detailed Transactions Report
Run By: John Demo

Detailed Transactions Report: 2018-12-01 to 2018-12-06

Date	Time	Order #	User	Location	IP Address	TID	Serial #	Mobile Device ID	Transaction Type	Payment Method	Entry Type
------	------	---------	------	----------	------------	-----	----------	------------------	------------------	----------------	------------

0 Transaction(s)

Transaction Amount

Credit

Debit

Cash

Total:

Tax Amount Summary

HST

Export Report

Export Form: PDF XLSX

Pages
 All pages Current page Pages:
(Enter page number(s) and/or page range(s). For example: 1-6 or 1,3,6)

Fit To
 Auto Actual size Fit to whole page

Refund Net Quantity

0

0

0

0

0

Refund Net Quantity

0

Updating Your Account Profile

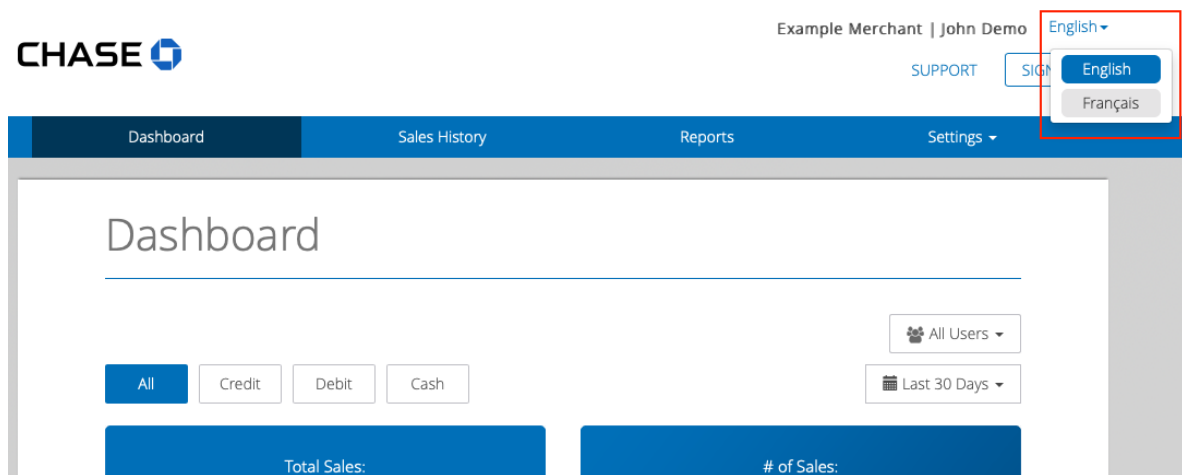
To change the name associated to your account, please call merchant support at 1-800-507-0782.

Changing Your Language

The Merchant Portal can be viewed in either English or French.

To change your language:

1. From any screen, select your preferred language from the dropdown next to your name.



Note



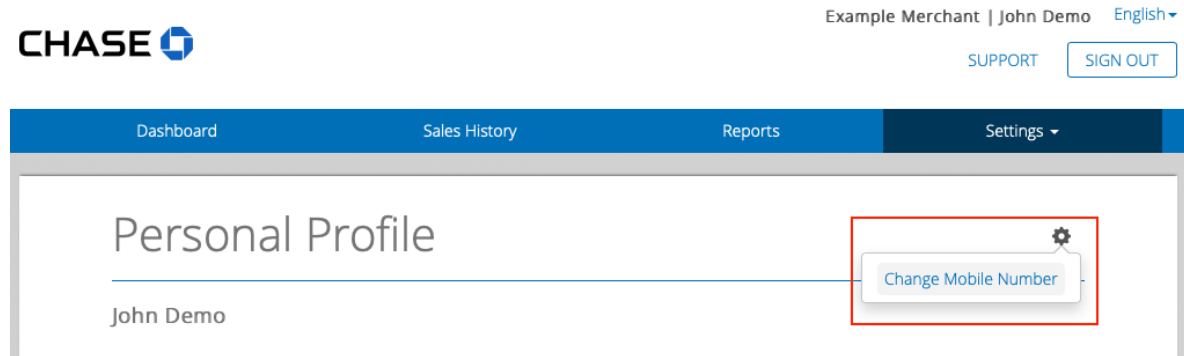
The language you select is saved for both the Merchant Portal and Mobile App.

Changing Your Mobile Number

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

To change your mobile number:

1. Click on **Settings** > **Personal Profile** menu button.
2. Click on **Change Mobile Number** in the gear icon.
3. Enter your new **Mobile Number** and click the **Submit** button.



Updating Your Security Settings

Changing Your Password

Your password is required to sign in to the Merchant Portal or Mobile App.

To change your password:

1. Click on **Settings > Change Password** menu button.
2. Enter your **Current Password** and **New Password** and click the **Submit** button.

Change Password

Enter the information below to continue.

Current Password*

Password must be 8 to 16 characters long and include at least one capital letter, one lower case letter and one number.

New Password*

Confirm New Password*

Cancel Submit

Changing Your Authorization PIN

Your Authorization PIN (set up when you first signed in) is used as an additional security check if your password was incorrectly entered multiple times during sign in.

To change your authorization PIN:

1. Click on **Settings > Change Authorization PIN** menu button.
2. Enter your **Current Authorization PIN** and **New Authorization PIN** and click the **Submit** button.

Change Authorization PIN

Enter the information below to continue.

Current Authorization PIN*

Authorization PIN must be 4 to 6 digits.

New Authorization PIN*

Confirm New Authorization PIN*

Cancel Submit

Updating Your Verification Preference

Two-factor authentication provides an extra layer of security to your account.

As an additional security check, you will be asked to enter a temporary verification code when you sign in on a new device/browser or when you request your password or Authorization PIN to be reset.

The verification code will be sent to either your Email or your Mobile Number based on your preference.

To update your verification preference:

1. Click on **Settings > Verification Preference** menu button.
2. Choose **Email** or **Mobile Number** and click the **Save** button.

Verification Preference

We will use this selected communication type when signing in from another device.

Email: john.demo@mail.com

Mobile Number: (+1) 416-558-1754

Cancel

Save

Updating Your Merchant Settings

To change the name or address associated to your merchant profile, please call merchant support at 1-800-507-0782.

Viewing Your Card Readers

Card Readers are used in conjunction with the Mobile App to process debit and credit payments.

The Card Readers screen lists the card readers associated to your merchant account, including information such as serial number, activation date, and status.

To view your card readers:

1. Click on **Settings > Card Readers** menu button.



TID	MAKE	MODEL	SERIAL #	ALIAS	ACTIVATION DATE	STATUS
001	Ingenico	ICM122-31T2647A	PMT17081PE392309	Link/2500-170817313091041101392309	28/05/2018	Active
003	Ingenico	Link2500	PMF18150PE168567	Link/2500-173517313091041102168567	20/08/2018	Active
004	Ingenico	iCMP	PP215077PD000018	i_MP-20486257	18/07/2018	Active

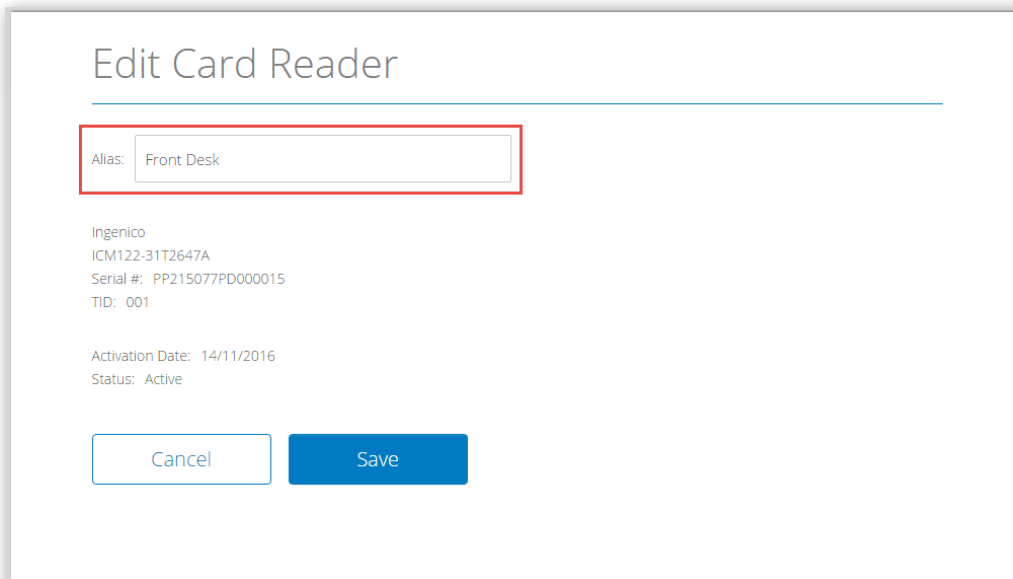
Here, you will see a list of card readers associated to your account. The CMC-Plus service supports the Ingenico iCMP and Link2500 card readers.

Updating a Card Reader's Name

You can assign a user-friendly alias name to each card reader for easier identification on Merchant Portal or Mobile App.

To update a card reader's name:

1. Click on **Settings** > **Card Readers** menu button.
2. Click on the **TID** of the card reader you would like to change.
3. Click on **Edit** in the gear icon.
4. Enter the new **Alias** and click the **Save** button.



Edit Card Reader

Alias:

Ingenico
ICM122-31T2647A
Serial #: PP215077PD000015
TID: 001

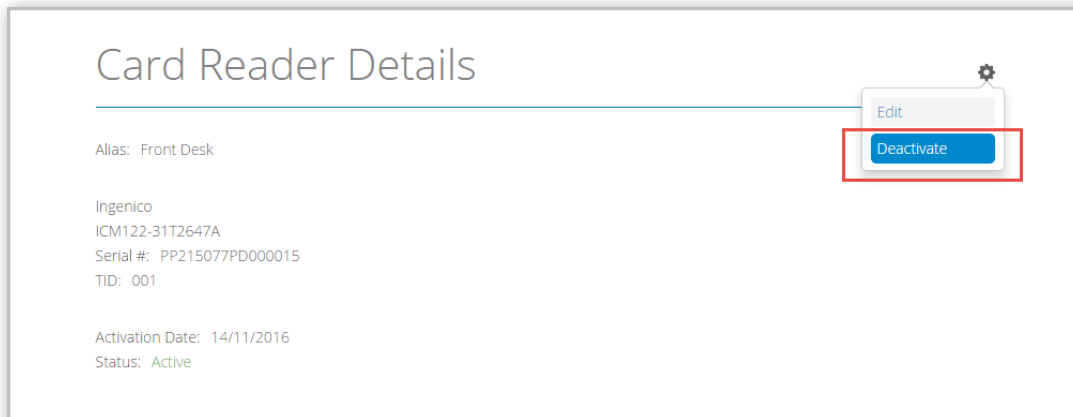
Activation Date: 14/11/2016
Status: Active

Replacing a Card Reader

Before you can replace your card reader, you must remove the old one from your merchant profile.

To remove a card reader:

1. Click on **Settings** > **Card Readers** menu button.
2. Click on the **TID** of the card reader you would like to remove.
3. Click on **Deactivate** in the gear icon and confirm the deactivation.



Note

The TID (Terminal ID) for the card reader will show as **Available** after deactivation. Follow the steps in the Mobile App to activate your new card reader.



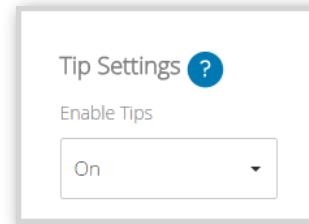
Setting Up Tips

Do you and your staff collect tips when you make a sale?

You can configure your card reader to prompt the customer with the option to add a tip when processing a transaction.

To enable tips:

1. Click on **Settings > Transaction Settings** menu button.
2. Select **On** in the **Enable Tips** dropdown menu and click the **Save** button.

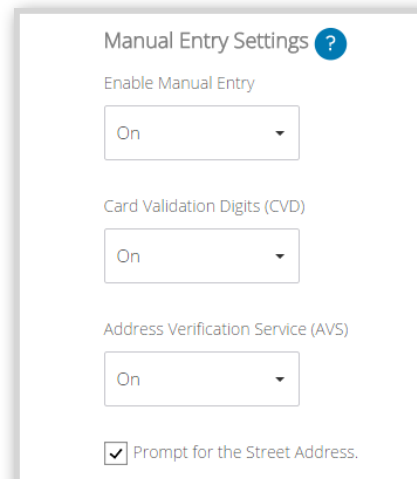


Configuring Your Manual Entry Card Settings

The Manual Card Entry feature allows you to manually key in card numbers on the card reader to perform transactions.

To enable manual entry:

1. Click on **Settings > Transaction Settings** menu button.
2. Select **On** in the **Enable Manual Entry** dropdown menu and click the **Save** button.



Note



If the Manual Entry feature is enabled, you may choose to collect **CVD** (the 3-4 digit code on the back of the card) or **AVS** (the customer's billing address) while performing a sale for additional fraud protection.

Receipt Settings

The receipts can be sent manually:

- right after the transaction is processed in the mobile app OR
- by accessing the Sale History in the mobile app at a later point in time OR
- by accessing the Sale History in the merchant portal at a later point in time

However, the receipts can be sent automatically as well. You can set up automatic sending by going to **Settings > Receipt Settings**.

Receipt Settings

Custom Message

Define a message to be displayed at the bottom of receipts. You could include your tax number and a friendly message for your customers.

GST #: 123456789RT0001
Have a nice day!

Auto Receipts

Automatically send receipts to the selected recipients below.

Performed by
 Manager
 All supervisors
 All employees

Cancel Save

Receipt Preview:

Card #: *****1234 Auth #: 801640
VISA CREDIT Entry Method: Chip

APPROVED
Verified By PIN

By entering a verified PIN, cardholder agrees to pay issuer's total in accordance with issuer's agreement with cardholder.

GST #: 123456789RT0001
Have a nice day!

AID: A0000000031010
TVR: 000008000
TSI: E800
AC: 0123456789ABCDEF
ARC: 00

Payment services provided by:
CHASE

On the same settings page you may add a custom message to the bottom of receipts.

Automatic Receipts

The [Receipt Settings](#) page allows you to enable automatic sending of receipts. You can do so by selecting any combination of the four options provided:

- Performed by (whoever is performing the particular transaction)
- Manager
- All Supervisors
- All Employees

You can choose one option, two, three, or all four options. If you choose for example “Manager” and “All Supervisors” then after every transaction processed, a receipt will be sent automatically to the manager and to all supervisors.

If no option is selected, receipts will not be sent out automatically. This is also the default state.

Make sure you save your changes by clicking the Save button at the end.

Custom Receipt Message

On the [Receipt Settings](#) page you may also add a custom message that will be displayed in the bottom half of your receipts. This is a great place to include a message for your customers.

After you type your custom message, a preview of the receipt with your custom message is displayed on the right side of the [Receipt Settings](#) page.

Make sure you save your changes by clicking the Save button at the end.

Tip



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

Managing Your Staff

The Staff User feature allows you to have additional user accounts for your staff to use with their own card reader or share multiple devices.

To view the list of your staff:

1. Click on **Settings** > **Staff Users** menu button.

Note



To add or make changes to your staff, please contact merchant support at 1-800-507-0782.

¹ Chase Mobile Checkout–PLUS is available to Canadian Merchants accepting transactions within Canada only. Chase Mobile Checkout–PLUS requires a compatible Apple smartphone or tablet with cellular or Wi-Fi® network connection, the Chase Mobile Checkout–PLUS application, a merchant services account with Chase® Merchant Services, and a Chase Mobile Checkout – PLUS supported PIN Pad. There is no charge to download the Chase Mobile Checkout – PLUS app, but there may be charges associated with the purchase and shipment of the PIN Pad. When using the app, message and data rates may apply. Such charges include, but are not limited to, those from your communications service provider. 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.

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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.