Chase Mobile Checkout – PLUS[™] Mobile Application User Guide

Grow your business — whenever and wherever you want!



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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 Chase Mobile Checkout – PLUS app, our supported card reader, and a merchant account with Chase Paymentech to experience the benefits of our newest mobile payment processing solution.

This user guide will introduce you to the Chase Mobile Checkout – PLUS Mobile App where you will be able to accept debit and credit card payments with your card reader and track your sales.

Getting Started

In order to use Chase Mobile Checkout – PLUS, you will need to first set up an account with Chase Paymentech. 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 Chase Mobile Checkout – 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.

Download the App



The Chase Mobile Checkout – PLUS Mobile App is available for iOS and can be downloaded from the App Store by searching for Chase Mobile Checkout – PLUS.

Once the Chase Mobile Checkout – PLUS Mobile App has been downloaded to your device, you will need to sign in to your account before you can use it.

Don't have an account?

If you do not have a Chase Mobile Checkout – PLUS account, please visit https://en.chasepaymentech.ca/cmcplus/contact_sales or call 1.877.552.5533 to speak with a sales representative.

Signing In

Your Chase Mobile Checkout – PLUS account is secured using your registered email address and password.

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

To sign in to the app:

- 1. Launch the Chase Mobile Checkout PLUS App on your device.
- 2. Enter your Email Address and Password and click the Sign In button.

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



Note:

Forgot your password?

You can reset your password yourself on the Chase Mobile Checkout – 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.

Activating Your Card Reader

Once you have set up your account and received your card reader, you must activate it in order to accept Debit & Credit transactions.

You will need to pair your card reader using Bluetooth on your mobile device. Once successfully paired, you can activate your card reader using the Chase Mobile Checkout – PLUS Mobile App.

Ensure your card reader is charged for at least 15 minutes before continuing.

Pairing Your Card Reader with Your Mobile Device

The pairing process requires that you enable Bluetooth on your iOS device (iPhone, iPod or iPad).

Access the Bluetooth Menu:

- Open the settings menu on your iOS device and navigate to Bluetooth Settings. Ensure Bluetooth is turned on.
- 2. Your phone will be discoverable. The name of your phone will be displayed in the Bluetooth Menu as shown to the right.

Turn on your Card Reader:

3. Press and hold the power button on the side of your card reader. If the card reader is already on, holding down the power button will reboot it.





Now discoverable as "CP-iPhone6s

Access the Functions Menu:

4. When you see the screen shown to the right, open the Functions menu by pressing F within 2 seconds.

If the Functions menu is not displayed, you can reboot the terminal by holding the power button, and try again.



Navigate to Bluetooth Pairing:

- In the Functions menu, navigate to option
 4 BT Pairing by pressing 4 on the card reader.
- Provide the state of the state
- You can use the F2 and F3 buttons to navigate up and down in the menu.

ingenico FUNCTIONS 1-TSA 2-CPX 3-VEGA 4-BT PAIRING ICMP 15 1-2 1-4

Access the Pair Device Menu:

 In the BT Pairing menu, select option
 2 – Pair Device (iOS) by pressing 2 on the card reader.



Search for your iOS device:

 In the Available Devices menu, select option 0 – Search Devices by pressing 0 on the card reader. The card reader will begin to search for your iOS device.

Confirm Pairing Between Devices:

Your iOS device will be displayed on the card reader. The card reader may discover multiple devices. Use the F2 and F3 keys to navigate the menu to find your iOS device.

8. Select your iOS device on the card reader.

The following screens will be displayed on your Card Reader and iOS device.



You must confirm the pairing request on both the card reader and iOS devices.

Note:

For your card reader to find your iOS device, ensure the Bluetooth settings on your iOS device is open and Bluetooth is turned on.



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AVAILABLE DEVICES

-Search devices



To turn off your card reader, hold # and $\begin{bmatrix} \\ \\ \\ \\ \end{bmatrix}$ at the same time.

- Press OK on the Card Reader 9
- 10. Press Pair on the Mobile Device

Verify Bluetooth Connection:

If the Bluetooth pairing request was successful, on your iOS device you will see Connected besides the card reader name in the Bluetooth settings menu.

11. On the card reader press [Bluetooth pairing menu and return to the default information screen.



Note:

If the pairing process is unsuccessful, you can try again by searching for the device from the card reader. See Search for Your iOS Device.

Connected

Activate Your Card Reader

Now that you have paired with your card reader, launch the Chase Mobile Checkout – PLUS Mobile App and log in using your username and password.

The app may automatically detect your card reader and activate it. Otherwise, follow the instructions below.

Viewing the Card Reader Status:

- 1. To view card reader status, open the application menu. You can do this by swiping the application from the left edge of the screen to the right or by pressing the menu icon.
- 2. Press Connect a card reader to launch the card reader Pairing Wizard.
- 3. If you have already paired with the card reader, you can skip the pairing steps. Press Start/Next until you reach the last page and select Scan for Card Reader.
- 4. The card reader will begin to activate. You will see a screen similar to the picture shown to the right.
- 5. The activation process may take a few minutes. Once it is completed, you will see a confirmation screen. The card reader status will display Ready for Use.
- 6. The card reader will display a welcome screen when activation is complete.

You are now ready to accept Debit & Credit payments!





7. Activate Your Card Reader The last step is to active the Card Reader



(X)

Performing a Sale

Now that you have activated your card reader, you are ready to accept Debit & Credit transactions.

Before starting a sale, confirm:

- A green checkmark on the menu icon is displayed
- The card reader status reads Ready for Use.

You can sell products by selecting Catalogue Sale or enter a transaction manually by selecting Enter Sale. This can be accessed from the home screen.





Catalogue Sale

You may perform a sale with products from your catalogue.

To perform a catalogue sale:

1. Select Catalogue Sale to display a list of the products you have available for sale.

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

Adding Products to your Cart

- 2. Add products to your cart by selecting the item in the catalogue. You can adjust the quantity of an item in the cart in 2 ways:
 - Press a product to increase the quantity for sale.
 - Use the roller to the right of the product item, swiping up and down to adjust the number of items in the cart.

To remove the item from the cart, de-select it by pressing the checkmark on the left side of the item.

3. After selecting your products for sale, press the cart icon to continue.





Accepting Payment

4. Select the payment method for your sale:

- Cash
- Card
- Manual Entry

See Cash, Card, and Manual Entry sections below for more details.

You may adjust the quantities for sale using the roller to the right of the item. To remove an item from the cart, slide it to the left, and select Delete.

Sending a Receipt

Once the transaction is completed a summary page will be displayed.

5. Choose to send a receipt to the customer via Email and/or Mobile Number, or continue without sending a receipt.





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

C Back New Sale - Accept Paymer	nt
Subtotal: 13.0% HST:	12.50 1.63
Total:	\$14.13
\$20.00	
Change Due:	\$5.87
Cancel	Accept



Card: Selecting Card will allow you to accept a Debit or Credit payment.

The card reader will display the Card Read screen, allowing the user to Insert, Tap or Swipe their card.

Manual Entry: Use the card reader to manually enter the customer's credit card number.

The card reader will prompt the merchant to collect the following:



Managing Your Product Catalogue

You can manage your commonly sold products and services within the Chase Mobile Checkout – PLUS Mobile App 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 pull down on the screen to reveal the search bar.



Adding a new Product

To add a new product:

- 1. Go to Product Catalogue from the menu button.
- 2. Press Add. 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 Applicable Tax 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.

く Back	Sum S	
dd Product		
L PR		
Product Name*		
\$0.00		
Product Description		
Product SKU		
Applicable Tax	None >	
Categories	None >	
Save		

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 price tag icon or current image. You will see 2 options:
 - Capture Image: Use your mobile device's camera to take a picture of the product
 - Choose Image: Select an image from the gallery on your mobile device.

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.
- 2a. Slide the product to the left to reveal the delete button. Press Delete to remove it from the catalogue.
- 2b. Press the Delete link to reveal the trash can icon next to the products. Press the trash icon to delete the product. Select Done to hide the trash icon.





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 All Items to display a list of existing categories and the option to manage categories.
- 3. Press Manage Categories to access the category page.

Adding a Category

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

To add a category:

- 1. Select Add.
- 2. Enter a Category Name, choose the Applicable 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 Applicable product(s) and press Save.

Deleting a Category

Deleting a category is similar to deleting products.

To delete a category:

 Swipe the category to the left to reveal the Delete button, or select the Delete link to reveal the trash icon.

Reviewing Sales

With Chase Mobile Checkout – 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 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 for today and all users are displayed.
- 2. Optionally, you can also view only the summary of your transactions by swiping to the right.

Ē	Such 2
Dashboard	
Today - All Users	
All Credit	
Total Sales: \$700.00	# of Sales: 7
Total Refunds: \$20.00	# of Refunds: 1
Total Tips: \$25.50	Total Taxes: \$6.34
	• •

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.

Note:

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

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 and/or mobile number and press Send Receipt.



Updating Your Account Profile

To change the name associated to your account, please call Merchant Support at 1.800.507.0782.

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 > User Settings > Personal Profile from the menu button.
- 2. Press on your mobile number to change it.
- 3. Enter your new Mobile Number and press Save.

Changing Your Language

The Chase Mobile Checkout – PLUS Mobile App can be viewed in either English or French.

To change your language:

- 1. Go to Settings > Language from the menu button.
- 2. Select English or French and press Save.

Updating Your Security Settings

Changing Your Password

Your password is required to sign in to the Chase Mobile Checkout – PLUS Mobile App and Merchant Portal.

To change your password:

- 1. Go to Settings > User Settings > Change Password from the menu button.
- 2. Enter your Current Password and New Password and press Save.

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. Go to Settings > User Settings > Change Authorization PIN from the menu button.
- 2. Enter your Current Authorization PIN and New Authorization PIN and press Save.

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. Go to Settings > User Settings > Verification Preference from the menu button.
- 2. Choose Email or Mobile Number and press Save.

Note:

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

Updating Your Merchant Settings

Viewing Your Merchant Profile

To change the name or address associated to your merchant profile, please call Merchant Support at 1.800.507.0782.

To view your merchant profile:

1. Go to Settings > Merchant Settings > Merchant Profile from the menu button.



Viewing Your Card Readers

Card readers are used in conjunction with the Chase Mobile Checkout-PLUS Mobile App to process debit and credit payments.

The card reader screen lists the card readers that are associated to your merchant account, including information such as, name, serial number and status.

To view your card readers:

1. Go to Settings > Merchant Settings > Card Readers from the menu button.



Updating a Card Reader's Name

You can assign a user-friendly alias name to each card reader for easier identification on the Chase Mobile Checkout – PLUS Mobile App and Merchant Portal.

To update a card reader's name:

- 1. Go to Settings > Merchant Settings > Card Readers from the menu button.
- 2. Press on the card reader you would like to update the name for.
- 3. Enter the new Alias (Name) and press Save.

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. Go to Settings > Merchant Settings Card Readers from the menu button.
- 2. Press Deactivate.
- 3. Press the trash can icon next to the card reader you would like to deactivate and confirm the deactivation.

Reinitializing a Card Reader

If your card reader's Bluetooth connection to your iOS device is good but you are unable to perform transactions, you can try reinitializing your card reader.

To reinitialize a card reader:

- 1. Go to Support from the menu button.
- 2. Press Initialize Now.
- The initialization process may take a few minutes. Once it is completed, you will see a confirmation screen. The card reader status will display Ready for Use.

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Contact Us	
Got everything you need questions, please visit ou Checkout-PLUS Support	ir Chase Mobile
Sales:	1-877-552-5533
Merchant Support:	1-800-507-0782
Merchant Information:	
DT1	
PNS MID: 700000200260	
Troubleshoot Card Reac	
Serial: PP215077PD00001 TID: 001	1
HD: 001	
Last Initialized: 21/10/201	6 14:58 Initialize Nov
Firmware:	
CPX Version: 1015	
CPX Version: 1015 Telium Manager Version: 1	7809
	7809

Managing Taxes

Adding a Tax

You can add taxes to your products.

To add a tax:

- 1. Go to Settings > Merchant Settings > Taxes from the menu button.
- 2. Press Add to display the add tax screen.
- 3. Select the tax type, enter the tax percent, choose the applicable products and press Save.

The add tax screen will automatically be displayed if no taxes have been set up.

Editing a Tax

You can edit a tax you have previously set up including the type, percentage, and products the tax applies to.

To edit a tax:

- 1. Go to Settings > Merchant Settings > Taxes from the menu button.
- 2. Press the tax you would like to edit.
- 3. Update the tax type, tax percent, or applicable products and press Save.

Disabling a Tax

You can temporarily disable a tax.

To disable a tax:

- 1. Go to Settings > Merchant Settings > Taxes from the menu button.
- 2. Press 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 Settings > Merchant Settings > Taxes from the menu button.
- 2. Press Delete.
- 3. Press the trash can icon next to the tax you would like to delete and confirm the deletion.

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. Go to Settings > Merchant Settings > Transaction Settings from the menu button.



2. Switch the Enable Tips toggle on and press Save.

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.

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.

Manual Entry Settings Image: Comparison of the set of the

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:

- Go to Settings > Receipt Settings from the menu button.
- 2. Type your message.
- Optionally, press the View Preview link to see a sample of the receipt with your custom message. Press the X icon to close the preview window.
- 4. Press the Save button.



Tip:

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

The Information You Need, When You Need it.

For Guides and Helpful Information: chasepaymentech.ca/welcome

Call Merchant Support 24/7: 1.800.507.0782



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