

EV³ Snap

User Guide

Mobile Point-of-Sale (mPOS), Version 2.0

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Overview

EVO Snap* Mobile is a complete mobile Point-of-Sale (mPOS) solution allowing small business owners to streamline sales and accept payments on the go with a smart phone or tablet device.

With EVO Snap* Mobile you can use your iOS® or Android™ device to process sales, apply discounts, calculate tips and taxes, email receipts, and issue returns and refunds wirelessly.

Note: mPOS is channel branded for customers and will never be known as EVO mPOS in market.

Features



Simple Mobile EMV Checkout

Tap to add items to the Snap* Mobile register, swipe the customer's card, and email their receipt.



Inventory Management

Create a library of items to sell from your Snap* Mobile POS and easily add new products in seconds.



Sales Reporting

Track your sales history with easy-to-use dashboards and customized reports for all your data.



Sell on Any Device

Turn your iOS® or Android™ device into a mobile POS system to process transactions anywhere, any time.



Versatile Payment Options

Process credit, signature debit, and prepaid cards. Snap* Mobile comes ready for EMV transactions.

Enhancements & New Features

- * **Integrated Password Reset Functionality**
 - o Forgot password
 - o Password reset – first time login, locked account, expired password
 - o Password change
 - o Set security questions and answers
- * **Enhanced Transaction History Functionality**
 - o Displays 90-120 days of transactions
 - o Search function added – by date range and filtered by amount, card type, or order number
 - o Void option added
 - o Existing Return function enhanced to include Return by ID
 - o Transaction Families displayed
- * **Internationalization and Localization Enhancements**
 - o Supports English and Spanish (Mexico and Spain) languages
- * **Updated Receipting Service**
 - o Email Receipting Service added through EVO Snap* API for iOS and Android
- * **Read Only Transactions Support**
 - o CVV text box removed on Payment screen
 - o All remaining fields shown as “read only” for tap, dip, and swipe

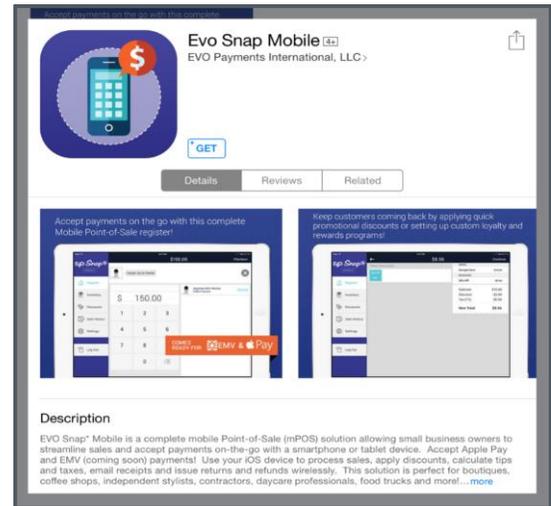
IMPORTANT: Users that currently use the MagTek or ITM-50 terminals and/or the old application will need to migrate to the ITM-100 terminal and new application to access these new updates. Merchants must also export their inventory before upgrading, otherwise they will lose their inventory.

Deprecation of Features

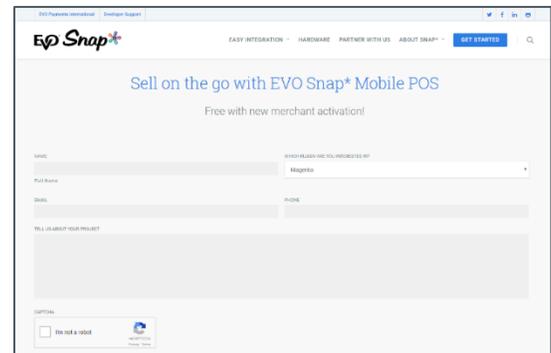
- * Please note that keyed transactions are **no longer supported** in the latest version of mPOS.
- * Integrated rewards, such as promotional discounts and custom loyalty programs for customers, **are not supported** in the latest version of mPOS.

Getting Started

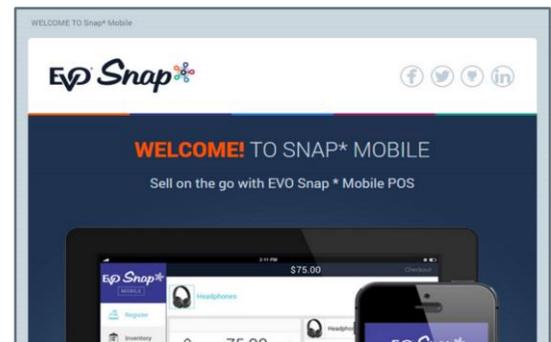
1. Download Snap* Mobile – EVO Snap* Mobile is available for iOS® and Android™. Download Snap* Mobile on the device designated as the register via the App Store or Google Play™.



2. Create an Account – After opening the app, clicking on the “Create an Account” box at the bottom of the Login page redirects the user to www.evosnap.com/snap-mobile/create-account/, where they can sign up for a merchant services account with EVO Payments International.

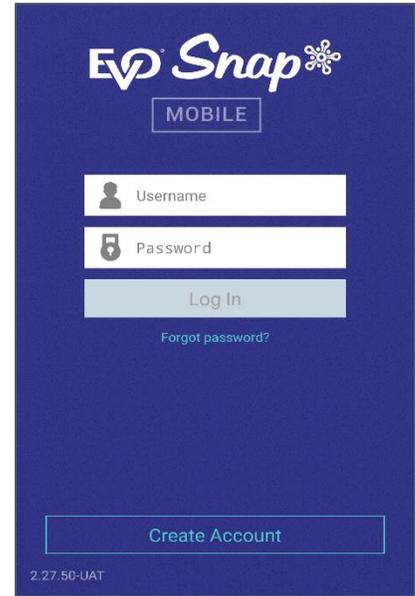


3. Receive Activation Email – Upon approval of the merchant’s account, an Activation email is sent to the merchant’s email address containing their User Name and Password login credentials.



- 4. **Login** – Launch the Mobile application on the mobile or tablet device and log in using the User Name and Password credentials provided in the activation email.

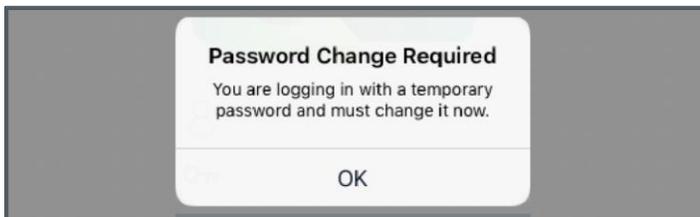
Note: If you have not received an activation email, please check your spam folder.



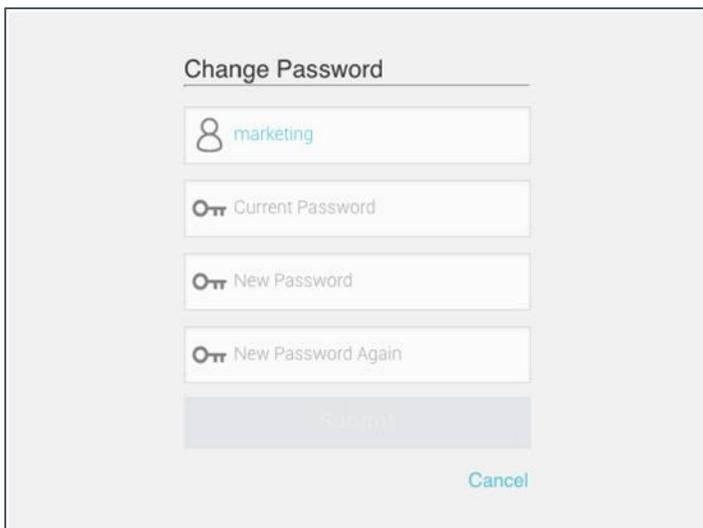
Login

First Time Login/Password Reset

Logging in for the first time or requesting a password reset requires the merchant to update their issued temporary password.

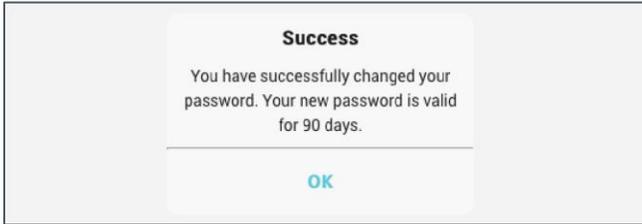


First, the app will prompt the user to change their password immediately after logging in with their temporary password.

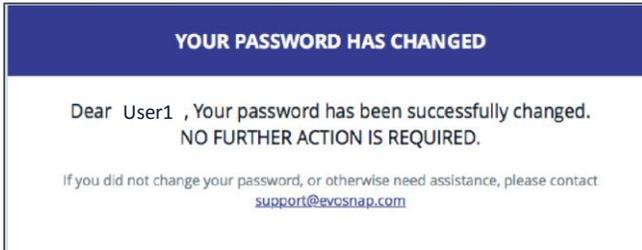


The merchant will then enter their current temporary password, their new password, and confirm their new password to update their temporary password.

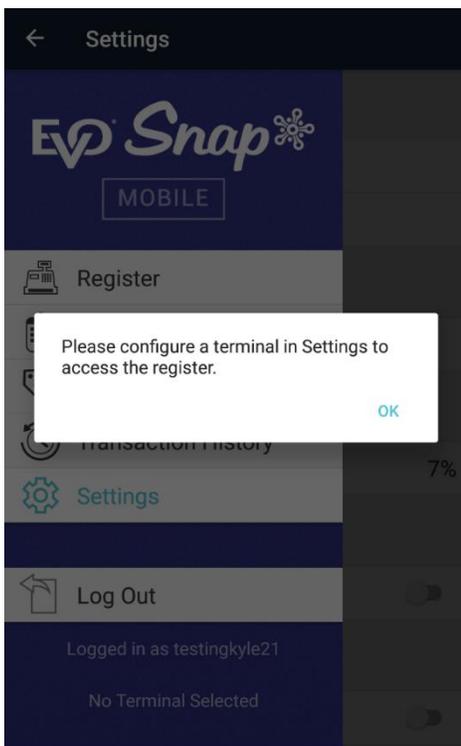
Note: The “Submit” button is not enabled until your new password and password confirmation values match and meet the required password criteria.



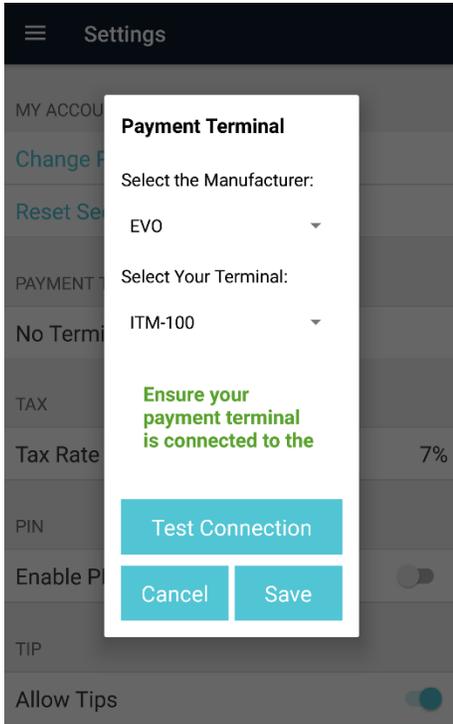
The app confirms the password for the merchant's account is updated and an email notification is sent to their email.



Note: Merchants will need to login with their updated password in order to access the Snap* Mobile functionality.



After logging in for the first time, the user is brought to the Settings. If they try to click on the Register, the dialog message to the left appears, informing the user that they must configure their terminal before any payments can be taken.

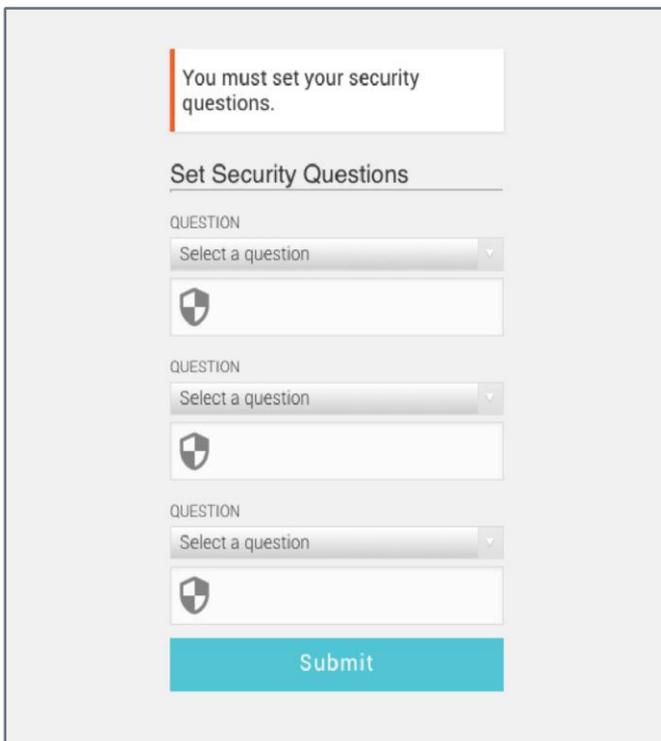


The user should then click on “Payment Terminal” in the Settings, which brings up the Payment Terminal pop-up shown to the left. Merchants will select their terminal’s manufacturer and terminal model, then click “Test Connection”. Once the terminal connection is successful, clicking “Save” saves the terminal settings for as long as the user stays in the mPOS application.

Merchants should check their terminal settings and test their terminal connection every time they enter the application.

Note: For merchants using Android OS 5.0, the mPOS application can take 3 to 10 tries to test the connection before connecting to the terminal.

Setting Security Questions



After updating their temporary password, merchants must set security questions for their account. Security questions allow merchants to request a password reset if they forget their password or lock their account.

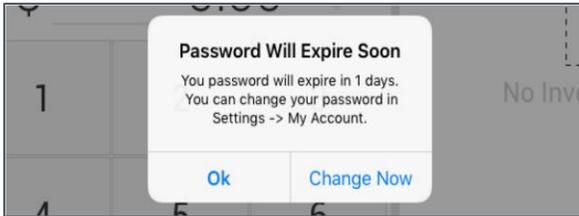
All user accounts must have 3 unique security questions selected and an answer for each question. Please note that spaces are not considered valid answers.

Security question selection and answer entry is required for all user accounts.

An email notification is sent when security questions and answers are successfully submitted.

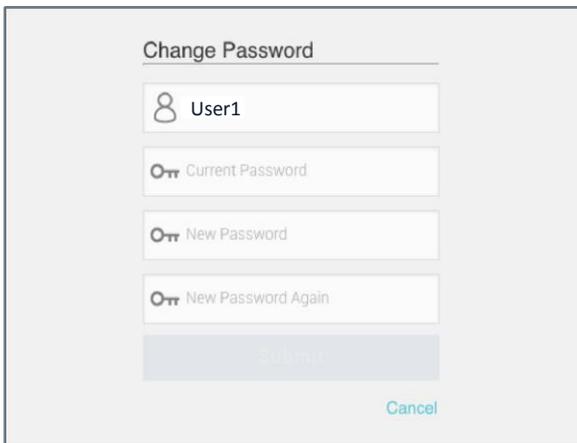
Password Expiring

When a password reset is requested, the temporary password must be updated. Passwords can be updated immediately or at a later date, but are required to be updated eventually.

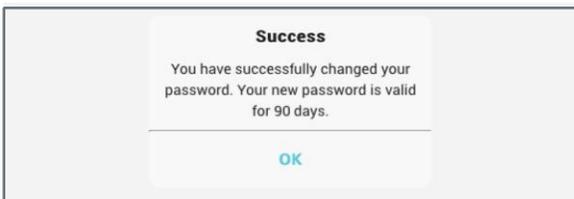


A password expiration notification message is displayed when the password is 10 days or less from the expiration date.

Note: If the password is not changed within the notification period, the account is locked and a password reset is required.



To update the password, merchants will enter their current password, new password and confirm their new password. The “Submit button” is enabled when the new passwords match and meet the required password criteria.



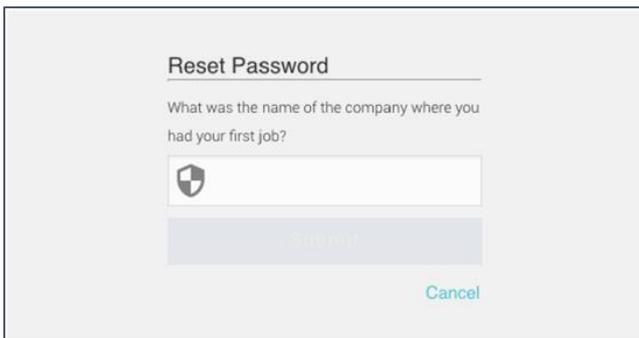
A message is displayed when the password has been updated successfully and an email notification is sent to the merchant.



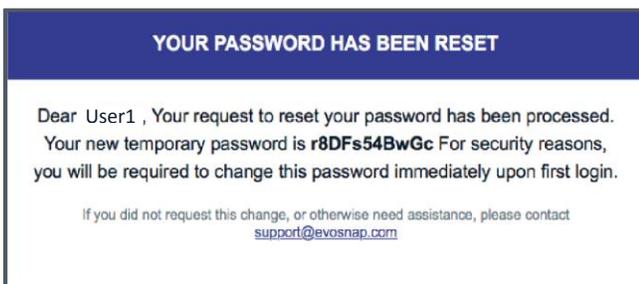
Expired Password



If a merchant’s password has expired, but they have set their security questions, the app first displays a message indicating their account is locked.



When the merchant acknowledges the message, one of the security questions they set for their account is displayed.



Once the correct answer is entered, an email notification is sent to the merchant containing their temporary password.

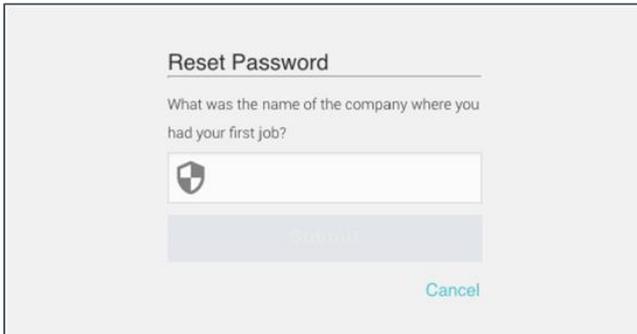
Note: If a merchant’s account is locked and their security questions are not set, they must contact Customer Support for assistance.

Password Reset with Security Questions Set

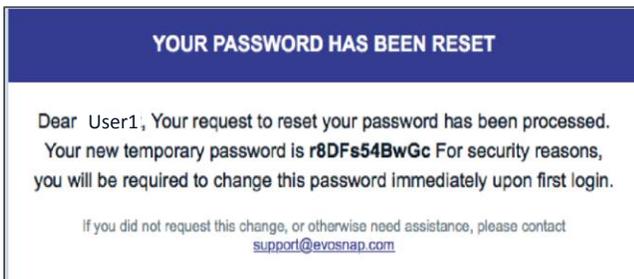
When a password reset is requested, the temporary password must be updated.



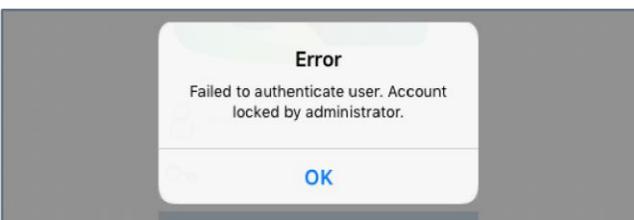
In case of a forgotten password, click on the "Forgot Password" link on the Login screen.



Merchants will enter their user name and answer the security question.



Once the correct answer is entered, an email notification is sent to the merchant containing their temporary password.



Important! - If your user account is locked by an Administrator, please contact your administrator for assistance.

Note: If your security questions are not set, please contact Customer Support for assistance.

Settings

See the figure below to learn more about the functionality available in the Settings page:

The screenshot shows the Settings page with several sections and options:

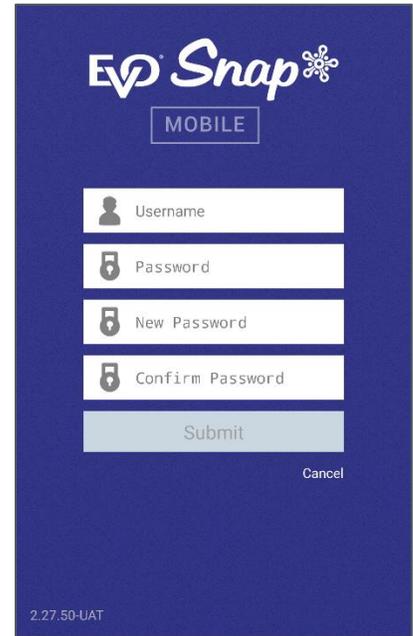
- MY ACCOUNT**
 - Change Account Password → [Change Password](#)
 - Change Account Security Answers → [Reset Security Answers](#)
- PAYMENT TERMINAL**
 - Select a Terminal → No Terminal Selected
- TAX**
 - Set the Tax Rate Percentage (Applicable to all items) → Tax Rate 7%
- PIN**
 - Enable a Security PIN (For accessing the Application Settings) → Enable PIN
- TIP**
 - Enable Tip Option and define Tip Preset amounts → Allow Tips
 - Tip Preset 2%
 - Tip Preset 5%
 - [Add a tip preset](#)
- DATA BACKUP**
 - Export Inventory to another device → [Export Inventory](#)
 - Import Inventory from another device → [Import Inventory](#)

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Change Password

Merchants can update their currently active account password. Click on **My Account > Change Password** and enter the current password, the new password, and re-enter the new password to confirm. The Submit button is enabled when the passwords match and meet the required password criteria.

An email notification is sent to the merchant when the password has been updated successfully.



Reset Security Answers

After initially selecting their security questions and answers, users have the option to update the answers at any time. Click on **My Account > Reset Security Answers** and enter the account's current password. Enter the new answers for your previously selected questions and click "Submit".

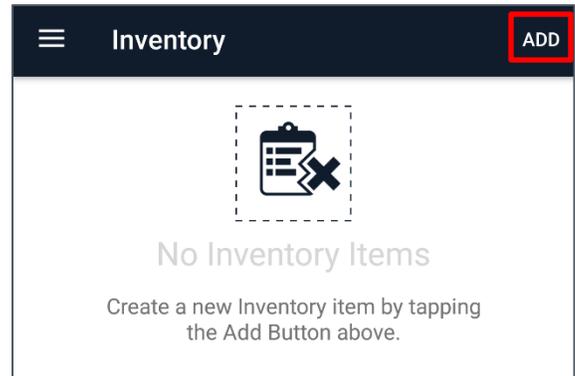
Note: Answers must be entered for all questions. Previous answers can be reused. When security answers are successfully submitted, a notification is sent to the merchant's email address.



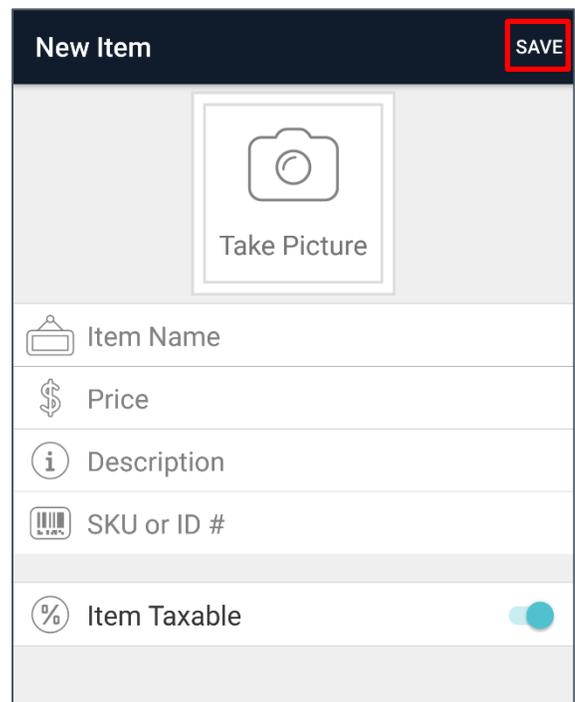
Inventory

Add an Item

To add an item to the inventory, click “Add” in the upper-right corner of the Inventory screen.



Tap the ‘Take Picture’ option to add an image of the item using the onboard camera option or from the gallery. Specify item Name, Price, Description, and Identifier. Identify an item as taxable with the toggle. fSave to add the new item to your inventory list.



IMPORTANT: Users that currently use the MagTek or ITM-50 terminals and/or the old application will need to migrate to the ITM-100 terminal and new application to access these new updates. Merchants must also export their inventory before upgrading, otherwise they will lose their inventory.

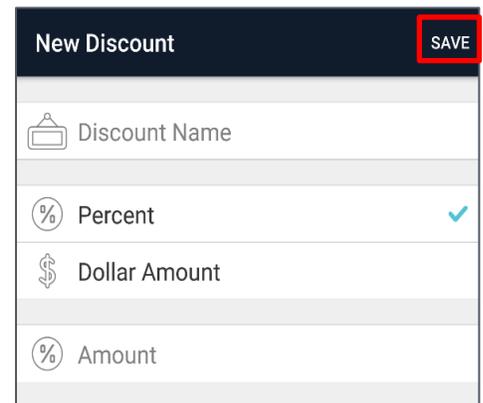
Discounts

Add a Discount

Navigate to the Discounts section in the main menu. Click “Add” in the upper-right corner of the Discounts Screen.



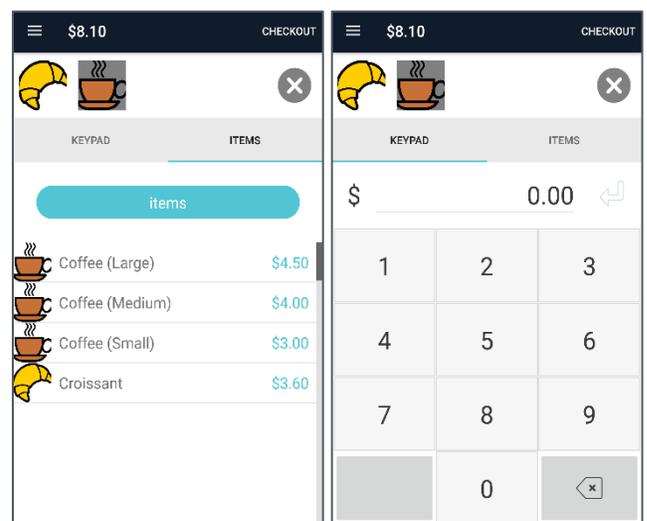
Add a name for your Discount (e.g.: SPRING BREAK). Specify a discount as Percent or Dollar Amount – please note that only one option can be active for a discount. Enter the discount value as a whole number for a percentage (%) and as dollars and cents (\$0.00) for a Dollar Amount discount. Click Save to add and use the new discount.



Mobile Register

Add Items to Shopping Cart

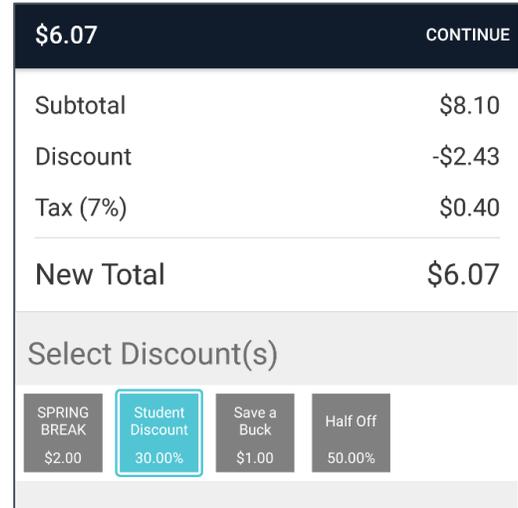
Click Register from the left-side menu to begin processing a transaction. The Shopping Cart at the top displays the item(s) selected for purchase. The Item list displays the Inventory; click on an Item to add it to the Cart. Items can be manually to the Cart by using the keypad. For each item entered manually, a picture can be added, the description can be changed, and tax can be toggled on or off. Use the keypad to enter the price of the Item or service charge.



To delete items from the Shopping Cart, swipe up on the item’s icon. Click “Checkout” when finished adding items to the Shopping Cart.

Apply Discounts

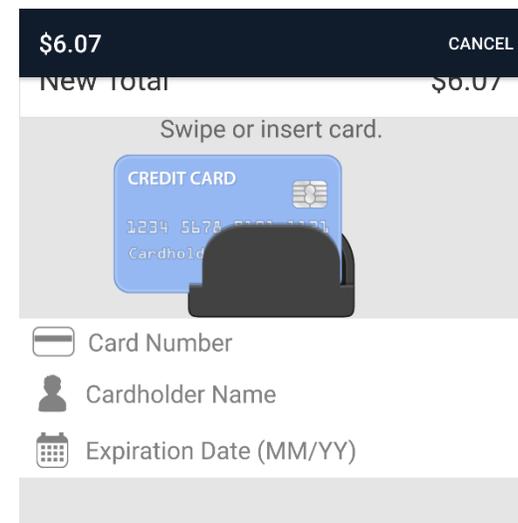
On the new total screen, there are options to apply pre-saved discounts and view the transaction subtotal. Select a pre-defined discount (optional). Please note that only one percent-based discount is allowed per transaction. Click "Continue" to finalize order and advance to the payment detail screen.



Enter Payment Details

Enter Payment detail information by swiping the customer's card. Please note that keyed transactions are **not supported**. Swipe a card with an attached device (iOS and Android). Click "Continue" to process the order or "Cancel". If the user does not continue with the transaction within 60 seconds, the transaction will time out and must be restarted.

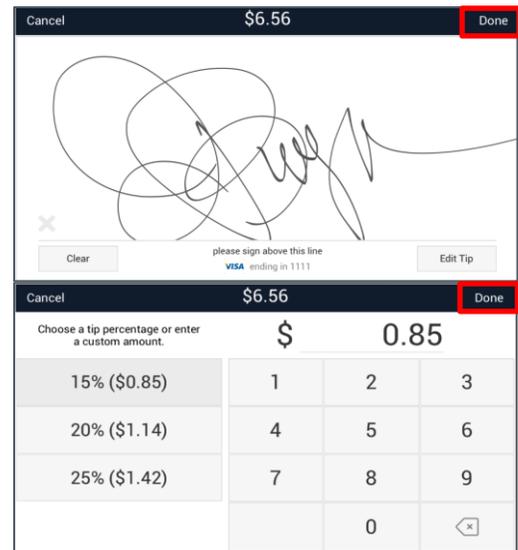
Note: The Payment Device is a secure card reader connected through its retractable headphone jack.



Finalize Payment

Hand the device to the customer to capture a signature. Customer can clear the signature or add a tip (if enabled). Customer can chose a preset tip or enter a custom tip amount. Click "Done" to process and email the receipt.

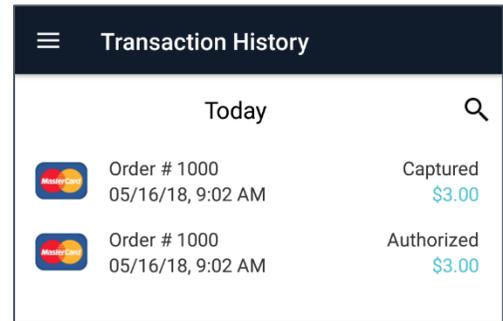
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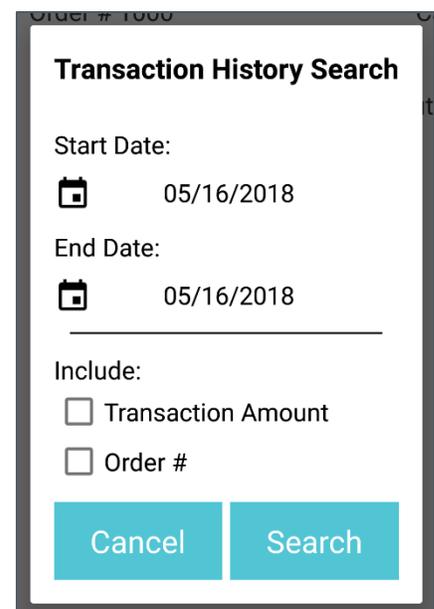
Sale History

View Past Transactions

From the Transaction History page, details about the transactions processed can be seen.

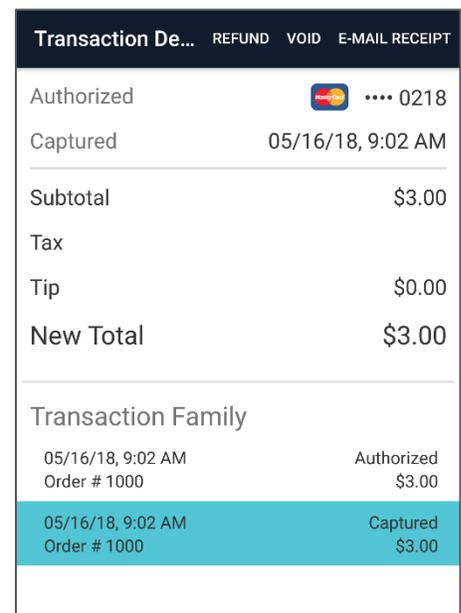


Merchants can search for a specific transaction using the Date Range Search function; transactions can be filtered by transaction amount or order number.



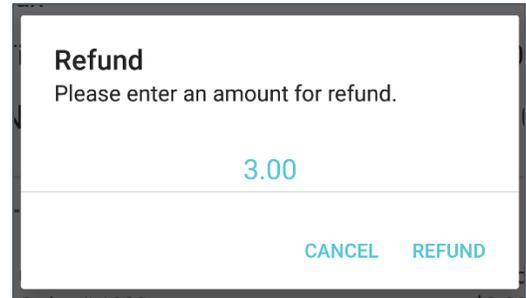
Note: Only transactions processed within the last 90 days are shown and able to be searched for in the Transaction History.

Transaction details include payment card information, capture time, and order totals. New to this version of mPOS is the “Transaction Family” section, which displays the related transactions to the one on the page.

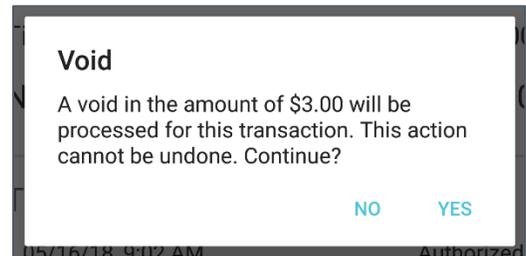


Refund/Void a Transaction/Email a Receipt

From the Transaction Details page, click the appropriate action to email a receipt or refund the transaction. Selecting “Refund” bring up a message asking for the amount to be refunded. Both full and partial refunds are supported.



Selecting “Void” brings up a confirmation message – tap “Yes” to continue with voiding the transaction. Please note that voiding a transaction cannot be undone.



Selecting “E-mail Receipt” brings up a message asking the user to enter an e-mail address to send the receipt to.

