EVO

EVO | MOBILE

EVO MOBILE

Simplifying
MOBILE PAYMENTS

SELL
On The Go

Merchant User Guide

EVO Mobile App v2.32.2 Aug 2020

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Overview

The EVO Mobile app is a complete mPOS solution allowing small business owners to streamline sales and accept payments on the go with a smart phone or tablet device. With the EVO Mobile app, business owners can process sales, apply discounts, add tips, email receipts, and issue refunds from their wireless Apple iOS® or Android™ devices.

Legacy versions of the EVO Mobile app have been channel branded for customers, including Charge 'N Go™. This document is for EVO Mobile. All other versions of the app are considered End-of-Life.

Benefits of the EVO Mobile App

> **Easy to Setup** – With its intuitive design and easy to use Settings tool, EVO Mobile can be configured and customized to fit your business needs in minutes.

> **Take Payments Now** – Start receiving timely payments from your customers at the time service is rendered with your EVO Mobile app.

> **Quick Checkout Process** - Tap to add items, insert or swipe the customer's card, and email their receipt in seconds.

> **Streamline Tipping** – With EVO Mobile's tip prompting, adding a dollar amount tip or preset percentage tip has been simplified for your customers.

> **Never Miss a Sale** – From the sales floor to an outdoors event, EVO Mobile is always ready to process credit, signature debit, and prepaid card transactions.

> **Stay Connected & Sale More** – EVO Mobile allows you to stay connected with customers while they remained engaged throughout the buying experience, all of which increases the likelihood of you making the sale.

> **Faster EMV Transactions** – EVO Mobile was built for high-speed EMV chip card transaction with its 3-4 second EMV transaction times that are as fast as a traditional swiped transactions.

> **Inventory Management** – Quickly create a library of items to sell from your mobile device and easily add new products in seconds.

> **State-of-the-Art Security** – Hosted on a secure website protected by the latest encryption technology and password-protected access, EVO Mobile gives you peace of mind when processing mobile transactions.

> **Apple or Android** – Whether you prefer using your Apple iPhone or iPad, or your Android phone or tablet....or all the above, our card readers can be used with all your devices and can easily switch from one to another.

> **Bluetooth 4.0** – Regardless of your phone or tablet, you can now pair to a Bluetooth card reader and not have to worry about an audio jack connection or extension cables.

About Your Card Reader

BBPOS - Chipper™ OTA

BBPOS Chipper OTA Specifications	
Function	> EMV contact chip card reader > Magnetic stripe card reader
Communication	3.5mm audio jack
Power	Lithium polymer rechargeable battery 125mAh, 3.7v
Charging	Via Micro USB
Battery Life	100 transactions per full charge
Supported OS	> Android 5.0 or above > Apple iOS 8.0 or above
Encryption	TDES, AES
Certification	EMV Contact L1 & L2
Dimensions	2.38 x 1.86 x 0.67inch / 60.66 x 47.3 x 16.9 mm
Weight	1.4oz / 40g

BBPOS - Chipper™ BT (BlueTooth)

BBPOS Chipper OTA Specifications	
Function	> EMV contact chip card reader > Magnetic stripe card reader
Communication	Bluetooth 4.0, USB
Power	Lithium polymer rechargeable battery 190mAh, 3.7v
Charging	Via Micro USB
Battery Life	420 EMV or 700 MSD transactions per full charge
Supported OS	> Android 5.0 or above > Apple iOS 8.0 or above
Encryption	TDES, AES
Certification	EMV Contact L1 & L2
Dimensions	2.43 x 1.75 x 0.65 inch / 61.8 x 44.5 x 14.2 mm
Weight	1.05oz / 29.8g

Note: Users that currently use the MagTek or ITM-50 terminals will need to migrate a current card reader.

New Readers Coming Soon (Not Released)

BBPOS - Chipper™ 2X BT (BlueTooth Contactless)

BBPOS Chipper OTA Specifications	
Function	> EMV contact & contactless chip card reader > Magnetic stripe card reader
Communication	Bluetooth 4.0, USB
Power	Lithium polymer rechargeable battery 650mAh, 3.7v
Charging	Via Micro USB
Battery Life	800 EMV, 1000 EMV Contactless or 5000 MSD transactions per full charge
Supported OS	> Android 5.0 or above > Apple iOS 8.0 or above
Encryption	TDES, AES
Certification	EMV Contact & Contactless L1 & L2
Dimensions	2.62 x 2.35 x 0.73inch / 6.66 x 59.7 x 18.5 mm
Weight	2.36oz / 67g

BBPOS - WisePad™ 2

BBPOS WisePad 2 Specifications	
Function	> EMV contact and contactless chip card reader > Magnetic stripe card reader > Secure PIN pad
Communication	Bluetooth 2.1
Power	Lithium polymer rechargeable battery 750mAh, 3.7v
Charging	Via Micro USB
Battery Life	> 600 EMV contact transactions per full charge > 650 EMV contactless transactions per full charge > 2200 magnetic swipe transactions per full charge > 12 hours of Bluetooth broadcasting per full charge
Supported OS	> Android 5.0 or above > Apple iOS 8.0 or above
Encryption	TDES
Certifications	> PCI PTS v4.1 with SRED > EMV Contact L1 & L2 > EMV Contactless L1
Dimensions	2.72 x 4.46 x 0.64inch / 69.2 x 113.4 x 16.3mm
Weight	4.59oz / 130g
Display	Backlit dot-matrix LCD display
Keypad	10 numerical, enter, cancel, clear, power, up/down buttons

EVO Mobile Features

EVO Mobile supports a robust suite of features to meet the needs of mobile business owners. Below is an overview of EVO Mobile's supported features.

Payment Features

Payment Features	Apple iOS	Android OS
Credit – Insert and Magnetic Stripe	Yes	Yes
Debit - Signature (Non-PIN)	Yes	Yes
Manual Card Entry	Yes	Yes
Prepaid Cards	Yes	Yes
Inline Tip Prompt: Preset Percentages and Manual Dollar Amount Entry	Yes	Yes
Refunds	Yes	Yes
Voids: Line Item and Transaction	Yes	Yes
Cancel Transaction	Yes	Yes
Email Receipt	Yes	Yes

*Contactless and PIN Coming soon – see the new readers section.

Additional Features

Additional Features	Apple iOS	Android OS
Inventory – Add, Edit, and Delete Items	Yes	Yes
Inventory – Export / Import Files	Yes	Yes
Discounts – Add, Edit, and Delete Discounts	Yes	Yes
Discounts – Dollar Off Total Purchase	Yes	Yes
Discounts – Percentage Off Total Purchase	Yes	Yes
Tax – Apply Tax % to Items	Yes	Yes
Tax – Manual Apply Tax	Yes	Yes
Tip – Preset Percentages	Yes	Yes
Tip – Dollar Amount Entry	Yes	Yes
Receipts – Resend Receipt	Yes	Yes
Settings – Change Password	Yes	Yes
Settings – Reset Security Answers	Yes	Yes
Settings – PIN (password) Protection	Yes	Yes
Settings – Test Connection to Reader	Yes	Yes
Reporting – Transaction History by Date Range	Yes	Yes
Reporting – Transaction History by Sale $ Amount	Yes	Yes
Reporting – Transaction History by Order #	Yes	Yes

Unsupported Features

Unsupported Features	Apple iOS	Android OS
Debit EMV	No	No
Gift Card	No	No
EBT Card	No	No
Tax – Apply Multiple Tax Rates to Item	No	No

Discount – Percentage Off Single Item Discount	No	No
PIN (debit/credit/EBT)	No	No
Credit Surcharge	No	No

Getting Started

Getting started with EVO Payments and securely processing transactions with the EVO Mobile app is a simple, fast, and painless process. At a high-level, the process includes downloading the EVO Mobile app, creating an EVO Payments Merchant Processing account, customizing the mobile app settings, and then starting to process sales.

1 Download App

Download the free EVO Mobile app for Apple iOS® or Android™ from the App Store or Google Play.

2 Create an Account

Tap the Create Account button to begin the process of opening your EVO merchant processing account.

3 Customize

Log into your EVO Mobile app to select security settings, add inventory, customize payment options to meet your business needs, and much more.

4 Make Money

Create inventory items or just enter a total sale amount, add a discount or tip if desired, and process your customer's credit cards using the BBPOS card reader.

Navigating the EVO Mobile App

Main Menu

From any screen, users can tap the menu icon (☰ to access the main menu.
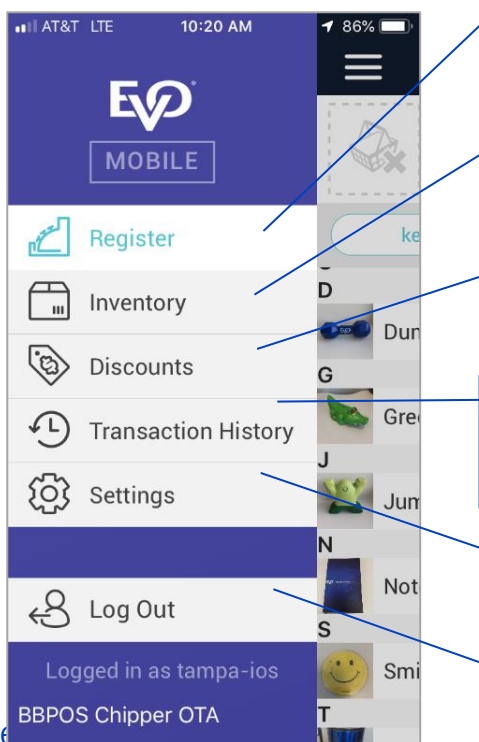
Register – Used to select items or to enter a dollar amount, apply discounts, add a tip, and finalize/process transactions.

Inventory – Used to add or edit sales items, including the item's description and picture, price, taxable status, and SKU.

**Discount** – Used to add or edit discounts, including description and percent or dollar amount discounts.

Transaction History – Used to search and view transactions by date range, dollar amount, or order number. Also used to process, voids, refunds, or to resend receipts emails.

Settings – Used to set a password, security questions, tax rate, add tip presets, export/import inventory, and select terminals.

Log Out – Used to sign out of the mobile application.

Settings Menu

From the main menu, users can select the Settings tool to customize their EVO Mobile account, including selecting security settings, discounts, preset tips, set a tax rate, adding/editing inventory, and much more. Below is an overview of the EVO Mobile app's account settings tools.
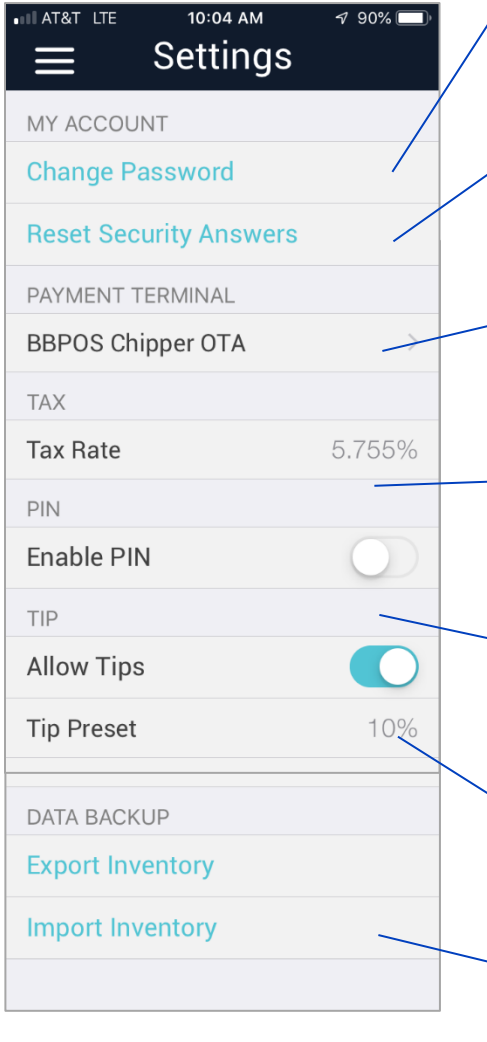
Change Password – Used to set or change the password on the account.

Reset Security Answers – Used to set or change the security questions and answers on the account.

Payment Terminal – Used to select the applicable card reader (or none for manual entry) and test the connection.

Tax – Used to set the sale tax rate that will be applied to the items sold during a transaction.

PIN – Used to enable security PIN protection on the account and to limit access to inventory, transaction history, and settings.

Tip – Used to allow tips, along with adding or editing preset tip percentages. Up to three preset tip percentages can be added to the account.

Data Backup – Used to export and import sales items or inventory from one smart device to another.

First Time Login Process

In order to start using the EVO Mobile app, users must go through the first-time login process. The process includes setting up a password, choosing security questions/answers, and selecting/testing the card reader. The instructions below outline the three parts of the first time login process for a new user.

1) Setting Up a Password

Upon opening a merchant account, an activation email containing a username and a temporary password is sent to the user. The username and temporary password are used to complete the first time login and change password process.

1. Launch the EVO Mobile app.

2. Enter the username found in the activation email.

3. Enter the temporary password and tap the Log In button. The app will prompt to change the temporary password.

4. In the Current Password field, enter the temporary password.

5. In the New Password field, type in a new password.

6. In the New Password Again field, re-enter the new password.

7. Tap the Submit button to complete the process.

Note: Users are required to login again using their new password. Passwords are valid for 90 days and can be changed at any time.

2) Choosing Security Questions & Answers

After setting up the new password, users must choose three security questions to answer. Security questions are used to reset users' passwords and regain access to their accounts when locked out.

1. Select your security question from the Select a question dropdown menu.

2. In the Enter your answer field, provide an answer to the question that was selected. Answers to the security questions are case sensitive.

3. Repeat steps 3 and 4 for the next two questions and answers.

4. Tap the Submit button to complete the process.

Note: An email notification will be sent confirming the successfully update. Answers can be changed at any time.

3) Selecting & Testing Your Card Reader

1. In Settings, tap the No Terminal Selected option in the Card Reader section. An option selector will appear on screen with all of the supported card readers.

2. Select appropriate card reader:

   a. Choose Manual Entry for no card reader
   b. Choose Chipper OTA for the audio jack reader
   c. Choose Chipper BT for the Bluetooth reader

3. Select Save.

4. Select Test Connection.

Note: If the card reader is properly connected and communicating, then a Success Terminal Connection Successful message will appear.
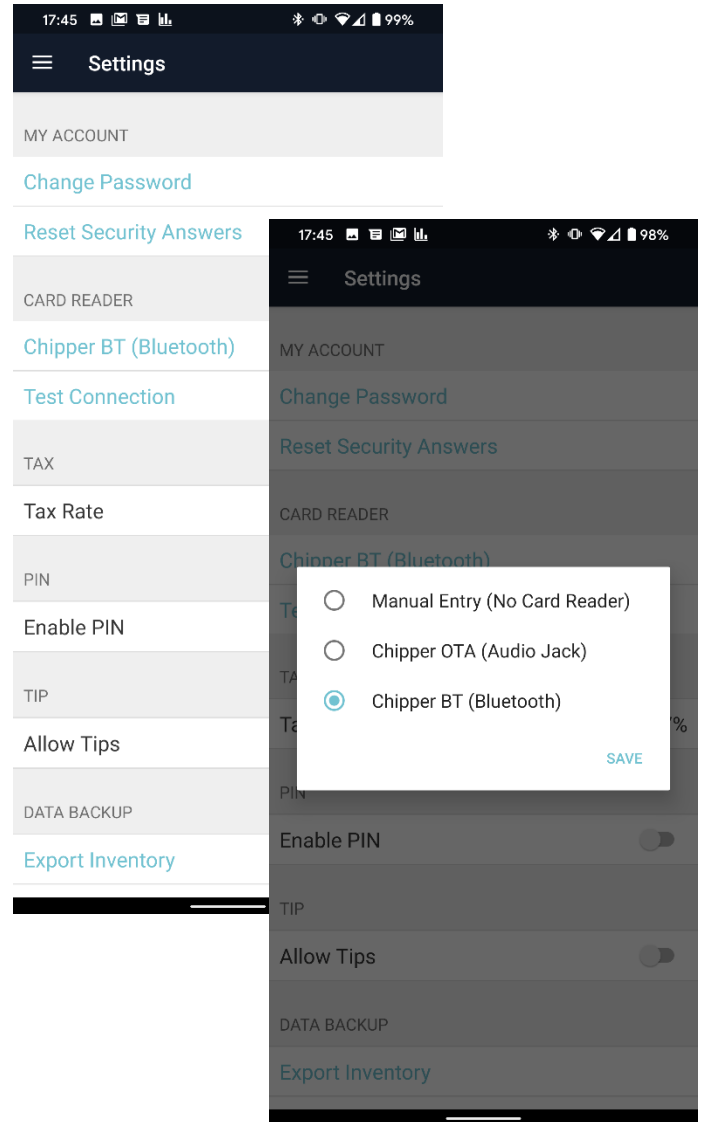
Mobile Register

Processing a Sale

1. From the main menu, select Register to begin the transaction.

2. To add products to the shopping cart, tap Items to display the product inventory list.

3. Tap the desired items to add to the shopping cart. Note: Items can be removed from the shopping cart by swiping up on the item.

4. If applicable, tap Keypad to manually enter a dollar amount for sales items.

5. For each item manually entered, users can add a picture, description and apply tax to the item by tapping the tools (•••) icon.

6. Tap Complete to continue to the subtotal screen.

7. If applicable, select a Discount to apply to the sale by tapping on the preset discount's button. The discount will appear on the subtotal screen.

Note: only one percent-based discount is allowed per transaction.

8. Tap Continue to continue to the checkout screen.

9. Insert, swipe or key the customer's card.
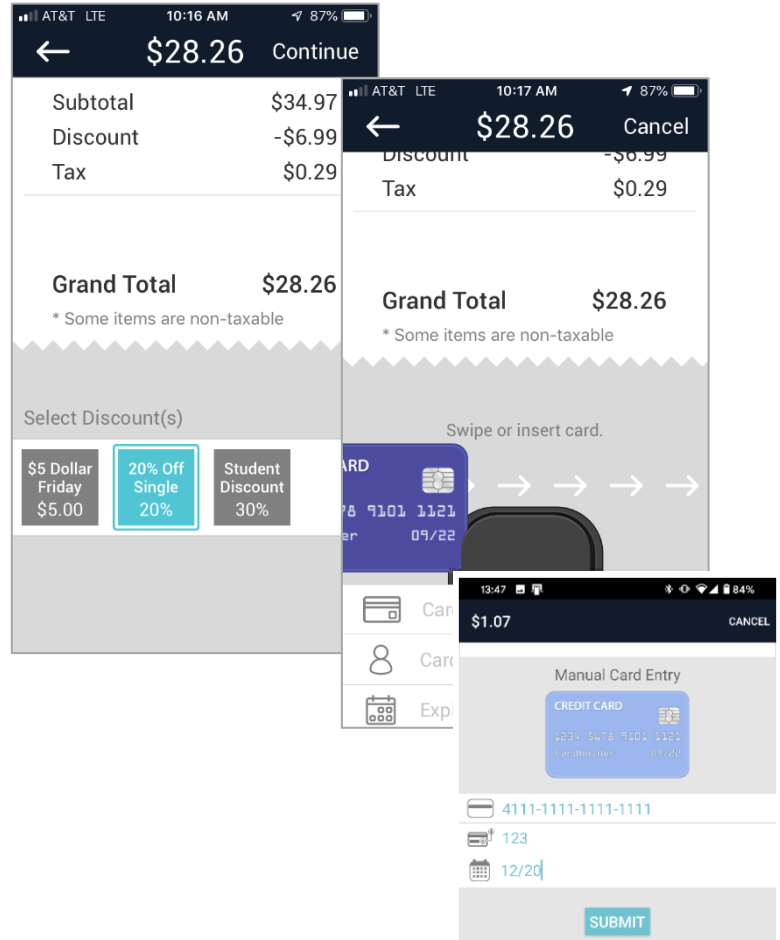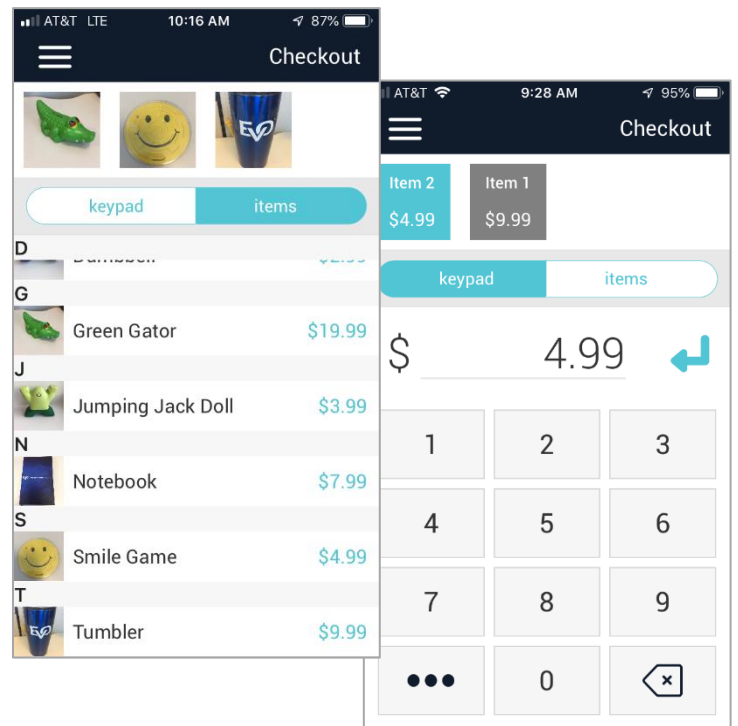
Continue on next page

10. If applicable, tap the Add Tip button to prompt the customer to enter a tip. The tip entry screen will appear.
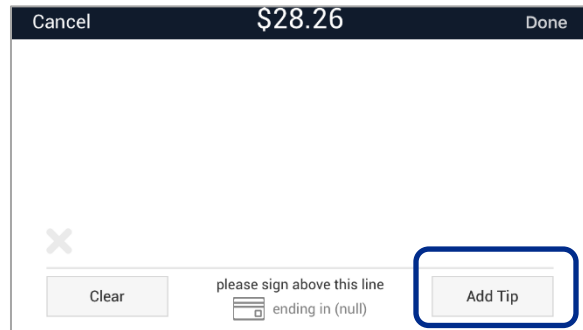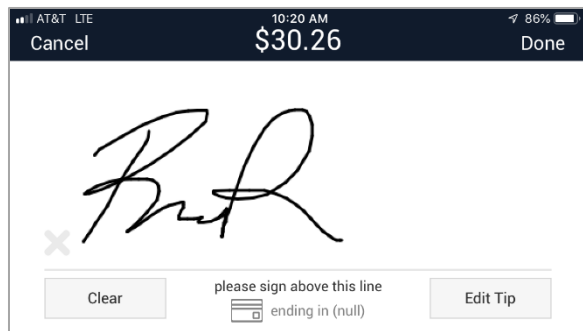

11. On the tip entry screen, customers can choose a preset tip percentage or they can enter a custom dollar tip amount.
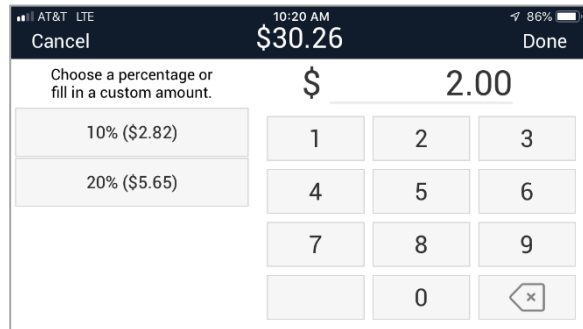
12. Upon entering a tip, tap Done to return to the signature screen.

13. On the signature screen, have the customer sign the receipt.

14. If needed, customers can erase the signature by tapping the Clear button.

15. Upon signing the receipt, tap Done submit the sale for processing.

16. A pop-up message appear, tap E-mail Receipt to send the receipt to the customer or tap OK for no receipt and to complete the transaction.
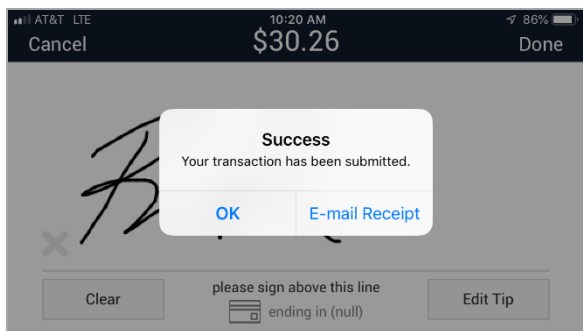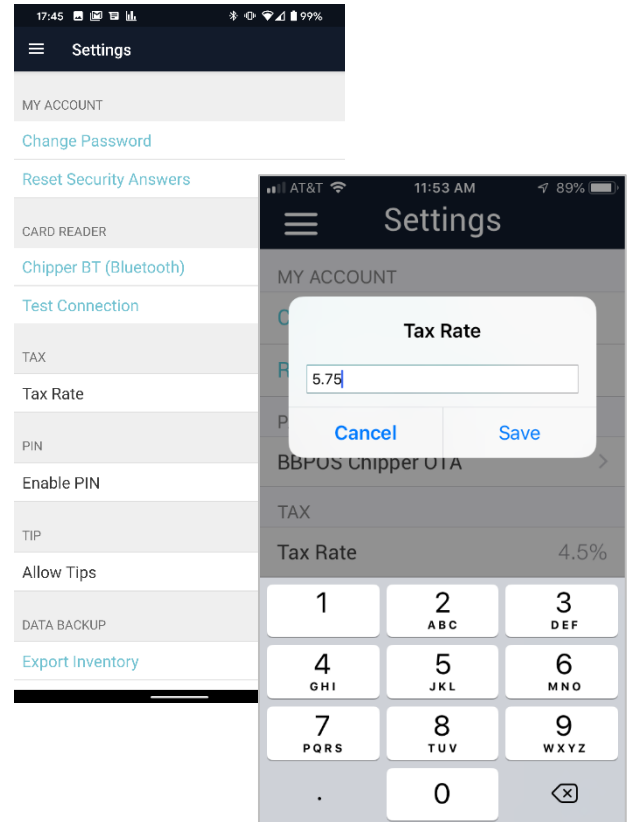
Settings

Adding a Tax Rate

1. In Settings, tap the Tax Rate option. A tax rate entry screen will appear.

2. In the data entry field, enter the applicable sales tax rate to be applied to the items sold.

3. Tap the Save button to set the sale tax rate and to complete the process.

Note: The new tax rate will appear on the Settings screen.

Enabling the PIN Security Protection

1. In Settings, slide the *Enable PIN* option to the ON position. A PIN entry screen will appear.

2. On the Enter New PIN screen, enter a four digit security PIN.

3. On the Verify New PIN screen, re-enter the four digit security PIN to confirm and complete the process.

Note: User will be required to enter their PIN when accessing Settings, Discounts and Transaction History.

4. To turn off PIN Security Protection, slide the Enable PIN option to the OFF position.

Note: The user will be prompted to enter their PIN prior to PIN security protection is turned off.
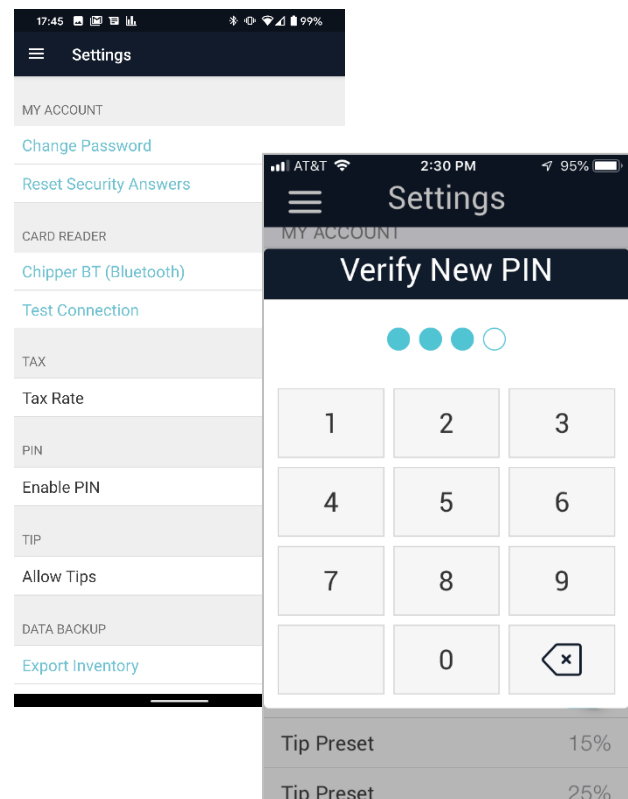
Creating a Tip Preset Percentage

1. In Settings, slide the Allow Tips option to the ON position.

2. Tap the Add a tip preset tool. A Tip Preset screen will appear.

3. In the data entry field, enter the desired preset tip percentage.

4. Tap the Save button to complete the process.

Note: The new Tip Preset will appear on the Settings screen. Up to three (3) preset tip percentages can be added to the account.

Note: To edit a Tip Preset, tap on the tip preset, edit the percentage and tap the Save button. To remove a Tip Preset, swipe the tip preset to the left and tap the Delete button.
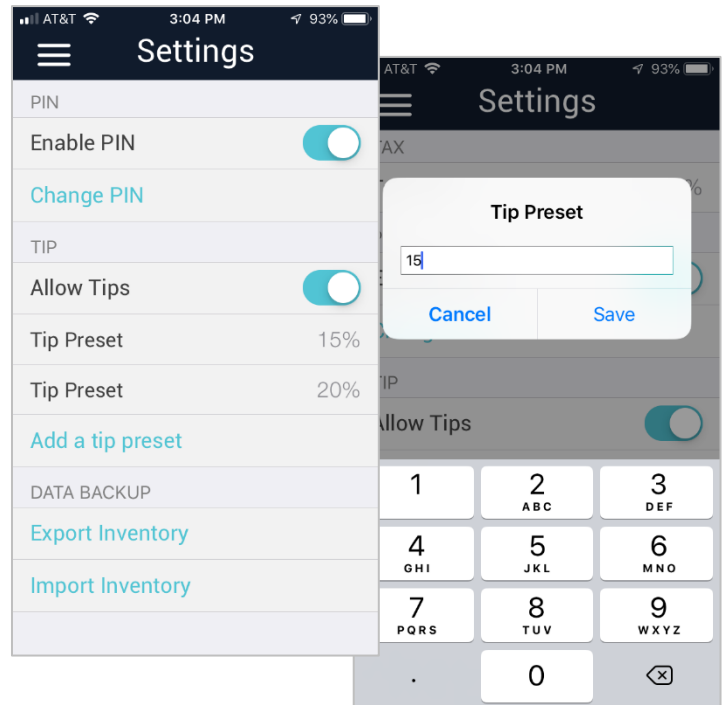
Data Backup – Exporting & Importing Inventory

Export Inventory

1. In Settings, tap the Export Inventory option. The device's cloud storage service options will appear. Examples of cloud storage services include Drobox, iCloud Drive and Google Drive.

2. Select the preferred cloud storage service to export the inventory file. This action exports and save the inventory file.

Import Inventory

1. In Settings, tap the Import Inventory option. The device's cloud storage service options will appear. Examples cloud storage services include Drobox, iCould Drive and Google Drive.

2. Select the applicable cloud storage service, then select the inventory file. This action imports the sales items in to the device's Inventory.
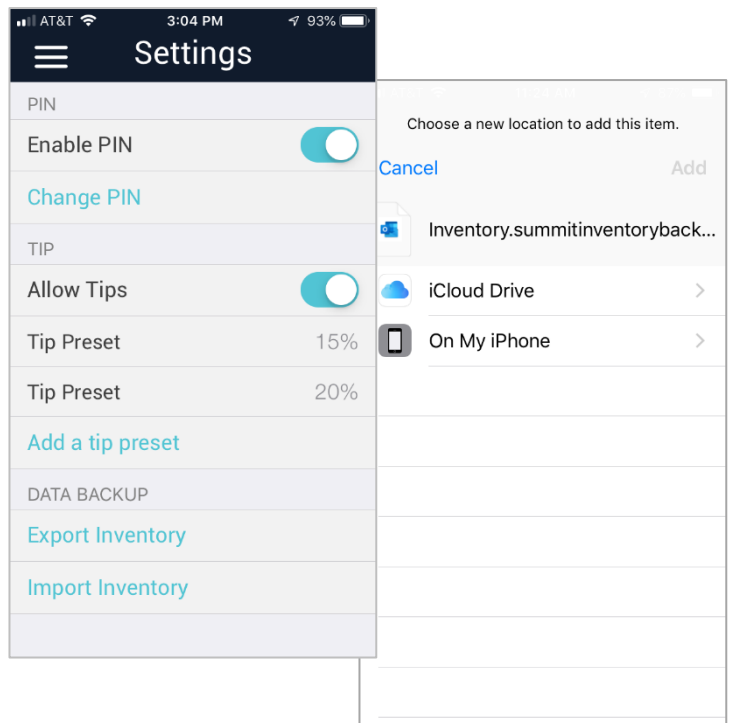
Note: When exporting and importing an inventory file from one smart device to another, both devices will need to have access to the same cloud storage service.

Adding Sales Items to Inventory

1. Tap the menu icon (≡) to access the main menu.

2. Tap Inventory to view the current inventory list.

3. Tap Add to access the New Item screen.

4. On the New Item screen, tap Take Picture to capture a picture of the product.

5. Enter the product information including the name, price, description and SKU #.

6. Slide the Item Taxable setting to the ON position if the item is to be taxed.

7. Slide the Favorites setting to the ON position to display the item at the top of the Register and Inventory screens.
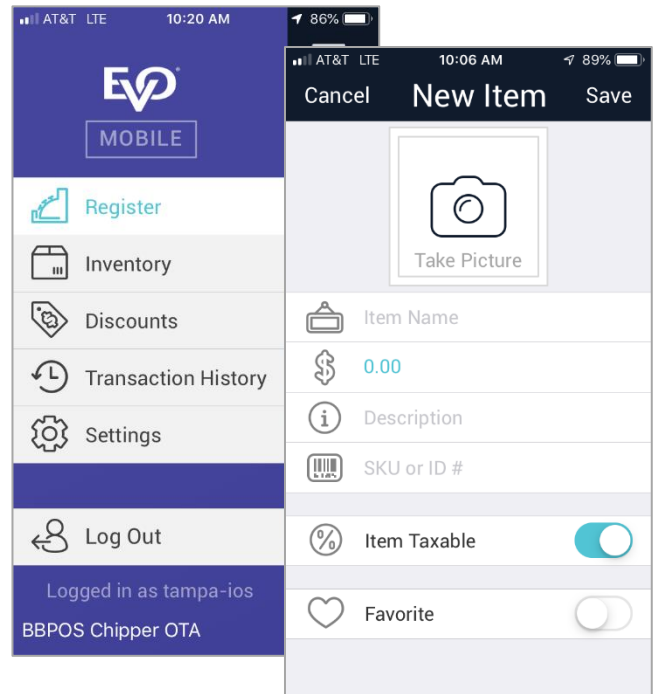
Discounts

Creating a Discount

1. Tap the menu icon (≡) to access the main menu.

2. From the main menu, tap Discount to view the current inventory list.

3. Tap Add to access the New Discount screen.

4. Enter the discount information including the name, percent or dollar amount and the value of the discount.

5. Tap Save to complete the process. The new discount will appear in the discount list and can be applied during a sale.
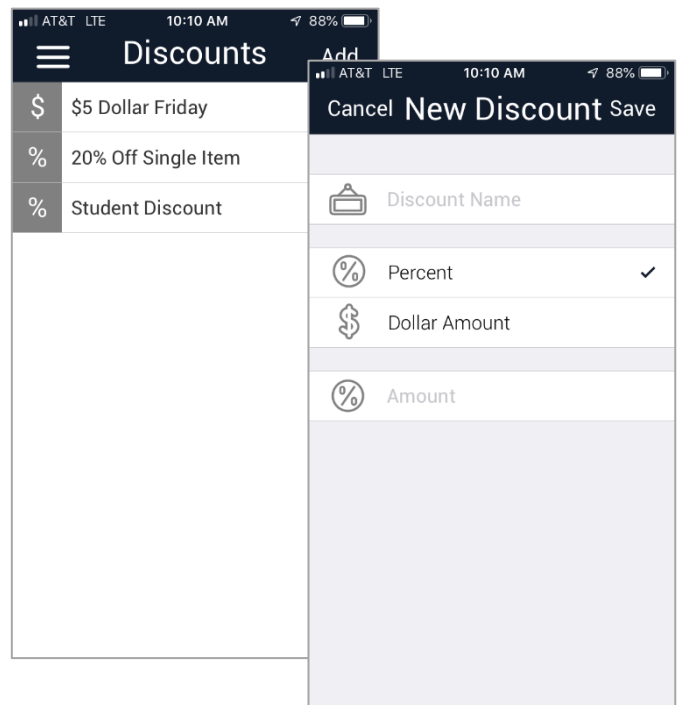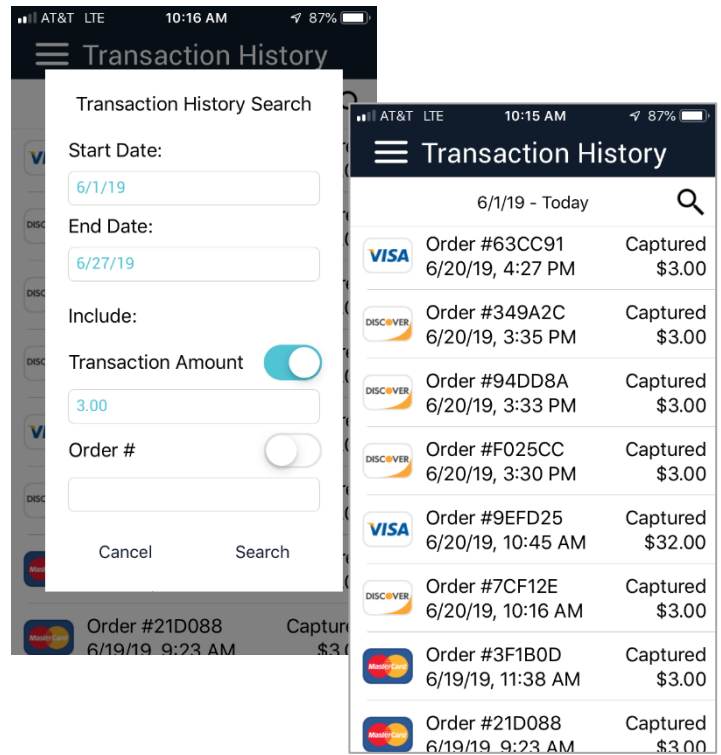
Transaction History

Searching for a Transaction

1. From the main menu, select Transaction History to begin the search. By default, the current day's transactions will display on the screen.

2. To search for a specific transaction, tap the search ( ) icon to display the Transaction History Search tool.

3. In the search tool, enter the one or more of the following search criteria:
   a. Start Date and End Date
   b. Transaction Amount
   c. Order #

4. Tap the Search button. The matching search results will display on the screen.

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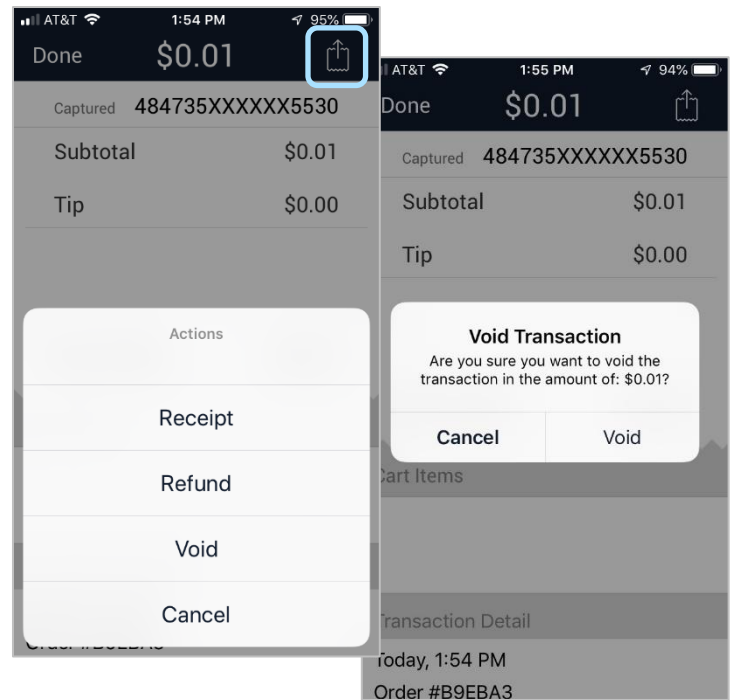
Refunding a Transaction

1. From the main menu, select Transaction History.

2. Search for the transaction.

3. From the list of transaction, tap the Captured transaction to be refunded. The transaction details will display on the screen.

4. Tap the Action ( ) icon. The Action menu will appear on the screen.

5. Select Refund. The refund screen will appear.

6. In the data entry field, enter the amount to refund.

7. Tap the Refund button. This completes the refund process.

8. Tap OK to finish or Email Receipt to send the refund receipt to the customer.
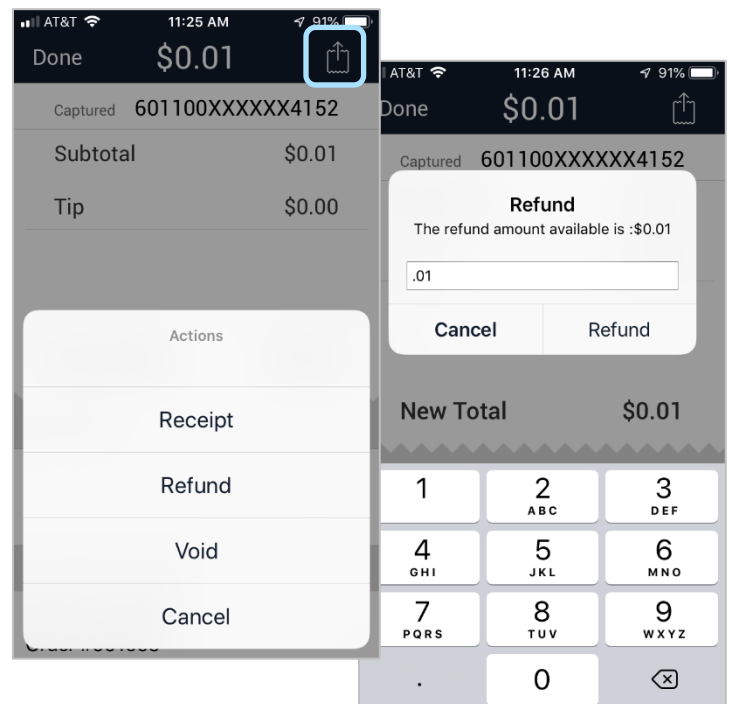
Voiding a Transaction

1. From the main menu, select Transaction History.

2. Search for the transaction.

3. From the list of transactions, tap the applicable Captured transaction to void. The transaction details will display on the screen.

4. Tap the Action ( ) icon. The Action menu will appear on the screen.

5. Select Void. A void confirmation screen will appear.

6. Tap the Void button to confirm the transaction and complete the void process.

Resending a Receipt

1. From the main menu, select Transaction History.

2. Search for the transaction.

3. From the list of transactions, tap the applicable Captured transaction. The transaction detail will display on the screen.

4. Tap the Action ( ) icon. The Action menu will appear on the screen.

5. Select Receipt. An email address data entry screen will appear.

6. Enter the email address and tap OK. The customer's receipt will be emailed.
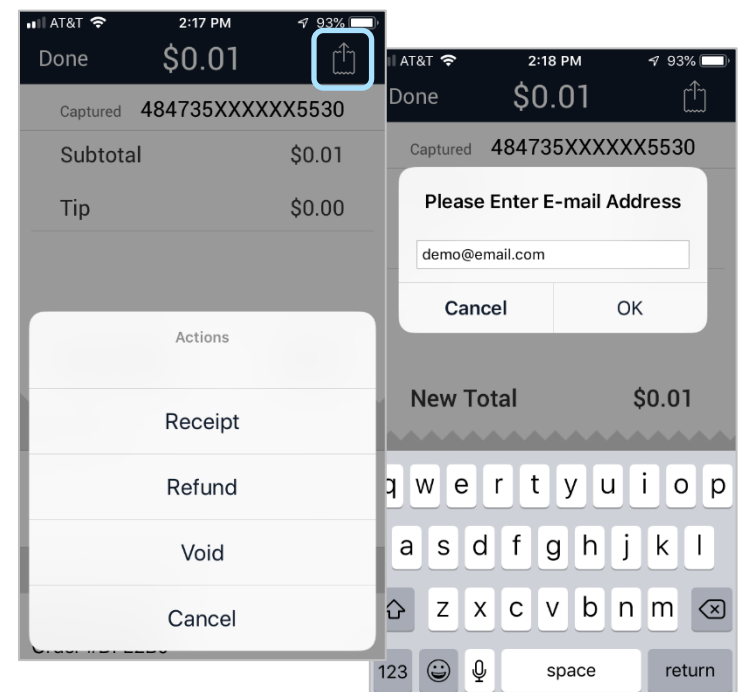
Forgot Password
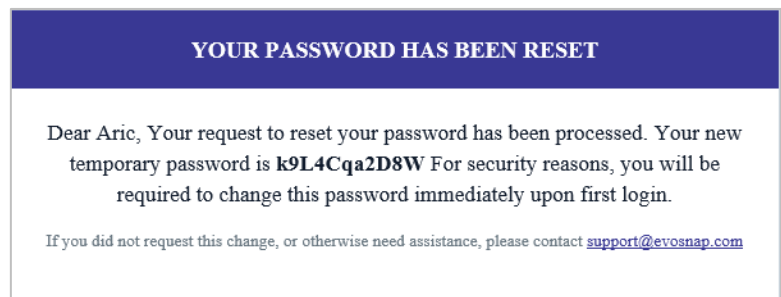
1. On the login screen, tap the Forgot password? link. The Reset Password screen will appear.

2. On the Reset Password screen, enter the Username associated with the account.

3. Upon entering the username, tap the Submit button. The Security Questions screen appears and will prompt the user to answer a security question.
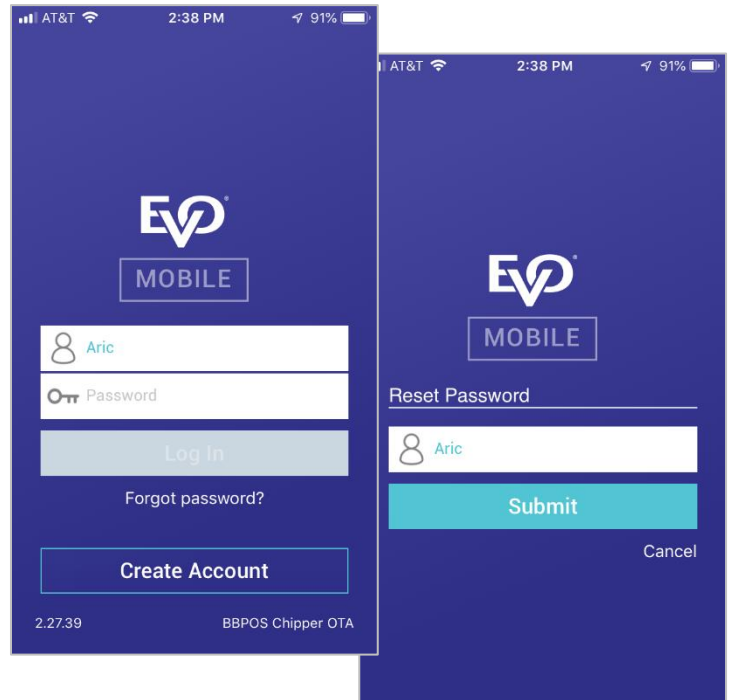
4. Enter the answer to the security question. The answer to the security is case sensitive and must match the answer provided during the security setup process.

5. Upon entering the answer to the security question, tap the Submit button.
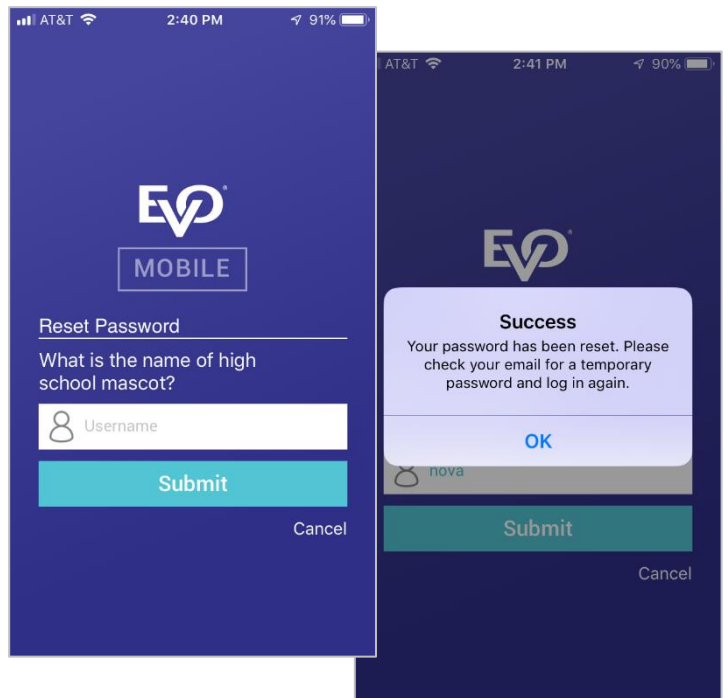
Note: An email containing a temporary password is sent to the user associated with the account. This temporary password must be used when logging into the account.

YOUR PASSWORD HAS BEEN RESET

Dear Aric, Your request to reset your password has been processed. Your new temporary password is **k9L4Cqa2D8W** For security reasons, you will be required to change this password immediately upon first login.

If you did not request this change, or otherwise need assistance, please contact support@evosnap.com

6. On the login screen, enter the username and temporary password and then tap the Log In button. The app will prompt to change the temporary password.

7. In the Current Password field, enter the temporary password.

8. In the New Password field, type in a new password.

9. In the New Password Again field, re-enter the new password.

10. Tap the Submit button to complete the change password process.