Payment Jack
QUICK REFERENCE GUIDE

Credit Sale

Credit Sales are run from the main screen of the App

- Enter Amount of Sale
- Enter Sales Tax %, Tip %, or Tip Amount (Optional)
- Choose Continue or Calculate (depends on Settings)
- Verify Total is correct and choose Continue
- Enter Name, Address, Zip Code, City, or choose Skip. (Address and name are optional on swiped transactions. Choose Skip to bypass)
- Make sure the swiper is fully plugged in and choose Swipe Card icon
- Wait for the screen to display "Please Swipe Card," then smoothly swipe the card
- Enter the Email Address, Invoice/Order #, Additional Notes (Optional)
- Choose Submit Payment
- Choose OK after reviewing the receipt
- Have the Customer sign above the line and choose Done
- Should display the main Sale Screen

Cash Sale

- Choose Cash Sale from the main screen
- Enter the Amount of the Sale
- Enter Sales Tax %, Tip %, or Tip Amount (Optional)
- Choose Continue or Calculate (depends on Settings)
- Verify Total is correct and choose Continue
- Enter Notes (Optional), check send receipt box, enter the customer's email address (Optional), choose Next
- Enter the customer's Home Phone #, check Collect Cust. Data (Optional), choose next
- Enter customer's Name, Address, Zip Code, City, State (All Optional info), choose Continue

Note: This step is skipped if reverse phone lookup was skipped

- Payment Submitted should display on the screen

Offline Sale

For offline transactions select option from main screen

Offline Credit Sale

- Select **Offline Credit Sale**
- Enter Amount of Sale, enter Sales Tax %, Tip %, or Tip Amount (Optional)
- Choose Continue or Calculate (depends on Settings)
- Verify Total is correct and choose Continue
- Make sure the swiper is fully plugged in and choose swipe

- Wait for the screen to display "Swipe Card Now," then smoothly swipe the card
- Choose Next when data is collected
- Enter Notes (Optional), check send receipt box, enter the customer's email address (Optional), choose Submit
- Should display Receipt Of Purchase, choose ok to return to the Offline Sale screen

Void Stored Trxs(Offline Mode)

- Select **Offline Credit Sale**
- Select **Void** from the Offline Sale screen.
- Select the transaction to be voided and choose details
- Verify you have chosen the correct transaction and choose void
- Choose Void Now
- Transaction Voided should display on the screen

Upload Stored Transactions

- Select **Upload Stored Transactions**
- Press the Upload All button
- Upload Results should display on the screen, choose continue
- Upload Complete should display on the screen

Void Transactions in Current Batch

- Select **Void** option from main screen
- Select desired transaction then choose Details button to view the transaction
- Verify you have chosen the correct transaction and choose void
- Select the Void Now button to void the transaction
- Transaction Voided should display on the screen

Credit Refund

- Select **Refund** option from main screen
- Select Credit
- Enter amount to Refund
- Make sure the swiper is fully plugged in and choose swipe
- Wait for the screen to display "Swipe Card Now," then smoothly swipe the card
- Choose Next when data is collected
- Refund Successful should display on the screen

History

- Select **History** option from the main screen
- Select the desired report by highlighting, press Select button
- Scroll up and down to view additional transactions.
- Selecting a specific transaction will give you the option to resend the receipt

Troubleshooting

Can't get into the app:

1) The username and the password are case sensitive; make sure you are using upper case letters when you should be.
2) Verify the username and password you are using from the Activation Email and that they are correct.
3) Delete the app from the phone, power off and then on the phone, Reprovision the phone from paymentJack.com. Go to the My Account Tab, then Reprovision phone. The new activation code can be any 10 digit numbers or letters. An easy example of an activation code is the last 7 digits of the cell phone number and lower case abc, e.g. 9876543abc. First uninstall the app on the phone. Then download the app using the new activation code.
4) Still can't get into the app, Call Payment Jack at 888-368-1725 for further troubleshooting. Please call from a different line than your device.

Device will not swipe:

1) Make sure the media/headset volume is at 100%. Hit the swipe button. When it says swipe card now, hit the up volume button on the side of the phone repeatedly until it shows on the screen media/headset volume 100%. Once the volume is all the way up, stop hitting the volume button. Count to three and then swipe the card with the magnetic strip facing the correct direction. If you are facing the front of the swiper (with the website,) you should also be looking at the magnetic strip.
2) Make sure there isn't a protective cover on the phone. Protective covers will not allow the swiper to plug in all the way. If there is a protective cover remove it.
3) Make sure the speakerphone is turned off.

4) Go to the app store/marketplace and make sure your phone has the latest software version. If there's a software update for your phone download it. Make sure to backup any files that could be lost in the update.
5) Still can't get it to swipe, call Payment Jack at 888-368-1725 for further troubleshooting. Please call from a different line than your device.

Payment Jack Customer Support Contacts

www.paymentjack.com

Phone: 1-888-368-1725

paymentjack@merchantserviceshq.com

To View and print our detailed Easy User Guide please go to:
http://merchantforms.com/forms/PaymentJack_EasyUserGuide.pdf