Sage Mobile Payments
User's Guide

Contents

Activating Sage Mobile Payments

To activate full service, please follow the steps below:

1 Upon signup, you'll receive an activation email which contains a username and temporary password. Follow the instructions in the email to activate your Sage Mobile Payments (mysagemobile.com) account.

2 To use Sage Mobile Payments, you must first log into your mysagemobile.com account, and:
- Accept Sage's Terms and Conditions
- Change your password
- Accept the recurring payment method provided

3 Download the Sage Mobile Payments application from your phone's Market/App Store.

NOTE: Until these steps are completed, you cannot use Sage Mobile Payments on your mobile device or PC/Mac Virtual Terminal.

If you experience any issues with the download or login, please contact your reseller.

If you have any questions about your mobile phone compatibility or how to find a phone model please visit http://www.roamdata.com/device-compatibility/ for supported devices, check our help center page with FAQs at: http://www.mysagemobile.com/faqs.aspx or send us an email from the Contact Us page in mysagemobile.com.
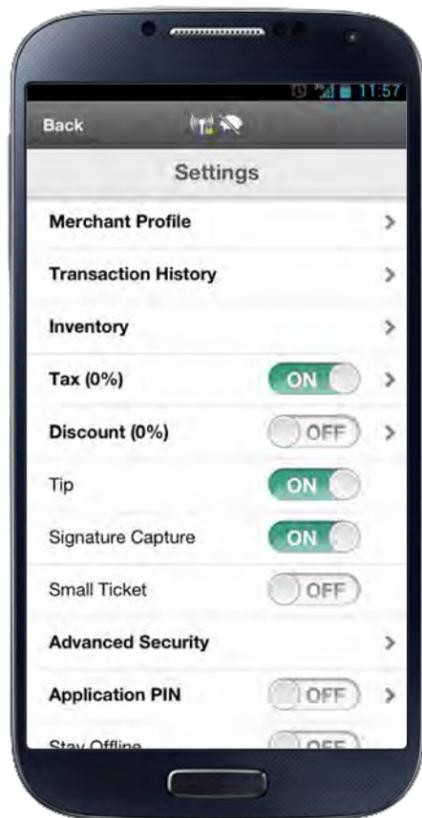
Figure 1

Figure 2

Login

All users must be authenticated using a username and password before gaining access to any functionality provided by the application. The username and password are case sensitive.

Launch Sage Mobile Payments by selecting the icon from your Applications folder. Enter your username and password, then tap **Log In** (Figure 1).

Multi user Login

You will be able to sign into Sage Mobile Payments on a device that someone else has already signed into Sage Mobile Payments on. This feature will prevent the need for the first user logging in to clear their app settings and potentially lose offline transactions in order to allow a second person to sign in. You can enable multiple users from your business to log in on the same device so you won't have to purchase multiple devices.

Sage Mobile Payments will support storing multiple settings files securely, including inventory items. One user will not be able to see the settings or inventory of another user and the settings will be retained and updated every time a user logs in to the app. Sage Mobile Paymentspay will store offline transactions for multiple users, but will not upload the offline transactions stored by one user when another user logs in to the app. Upload of offline transactions for a particular user will only be triggered by that user logging in or manually forcing upload. The app can support as many as 10 users with the constraint being the maximum amount of data the device is capable of storing.

First-time Login

If this is the first time you are launching the application, you will be asked to accept the Terms and Conditions, as well as change your password. Your password should be 5-64 characters in length and cannot contain special characters. Once you've entered this information tap **Change Password**.

Enter a personal email address at which you can receive your password if you lose or forget it.
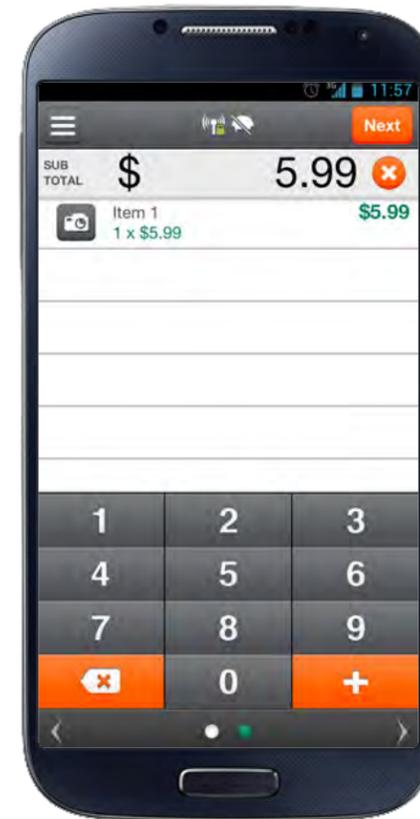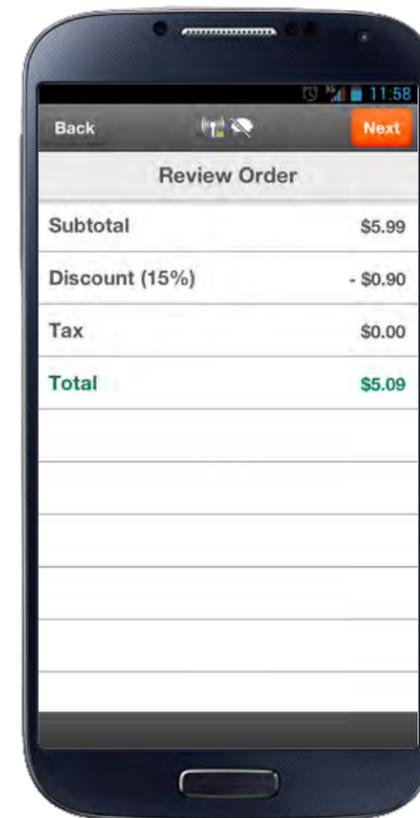

Figure 3

Figure 4

You will also be asked to set up two security questions which will allow you to verify your account if you lose access to it. Select two security questions and enter their answers. Tap **Submit**.

Default Settings

You will want to configure your default settings prior to your first transaction (Figure 2). These settings include

- Your merchant profile
- Inventory
- Sales Tax
- Tip (Gratuity)
- Discount
- Signature Capture
- Application PIN
- Advanced Security/AVS

Retrieving Your Password

If you forget your password, tap the **Forgot Your Password** button on the login screen. You will be prompted to enter your username, then tap **Submit**. An email will be sent to the address you entered above, with instructions for changing your password

Online Sales

To perform a sale from the main sale screen you may either enter the sale amount, or select an item you have stored as an inventory item (described later in this guide).

- Enter the amount of the sale in standard dollars and cents format; tap **Next** (Figure 3)
- Review Totals – Discounts and taxes will be applied if configured; tap **Next** (Figure 4)
- From the Tender page choose **Cash** or **Credit**; tap **Next**.
- For cash sales, tap **Cash**, enter the amount, then tap **Pay**.
- For credit sales either:
  □ Manually enter the card data, expiration date, CVV, and optional installment data, then tap Pay.
  □ Attach card reader and swipe the card. Enter the CVV number, optional installment data, then tap Pay.
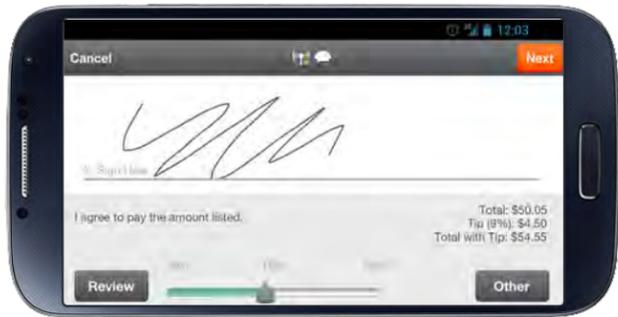
Figure 5

- If the signature capture is enabled, hand the device to the customer so they can sign the signature line (Figure 5).
  □ Manually enter the card data and tap **Next** (Figure 6)
  □ Attach card reader and swipe the card
- If tips are enabled, and the user wants to enter a tip amount, use the slider to indicate the tip amount. You can also select **Other** and enter the tip amount. Tap **Next**.
- The screen will display the receipt info. The customer enters their email address and taps **Next**, or **Skip** if they did not enter an address.
- The transaction completing message appears, and the customer will hand the device back to you.
- The next screen is for any notes you want to add to the purchase, and an invoice field. Tap **Skip** if no information is entered, or **Done** if notes or invoice are entered. You will be returned to the main sale screen.

Tender Type Selection Screen

You will be able to choose a tender type from a tender type screen (Figure 7), after you review the order (Review Order screen) and before you navigate to the payment information screen. The tender screen will ensure that you know, before continuing with the transaction, which tender type you are about to accept.
The flow of the app will be streamlined according to the tender you select. The Choose Tender Type screen will only appear if more than one tender type is enabled in the app. If only one Tender Type is enabled, the flow will skip the Tender screen and go directly to the Payment Info screen for the tender that is allowed.

Improved Payment Widget

The Payment widget will allow you to see the card data populated after the swipe of a card so that you know if the swipe was successful. In addition, you will be able to type in additional information for the payment such as number of Installments or AVS and CVV, which are not collected from the track data.

After a successful credit card swipe, the redacted card data will replace the Credit Card label in the payment widget and the expiration date will replace the
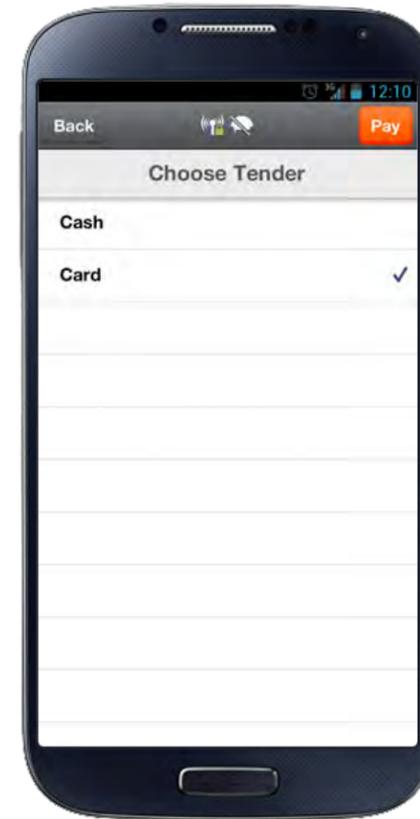

Figure 6

Figure 7

Figure 8

expiration date label. You will be able to continue with the transaction once the card number and expiration date have populated their respective fields. If CVV, AVS, or Installments are required, then you will be able to continue to the next screen only once the required fields have been populated with valid data.

When manual entry is disabled, you will not be able to modify the Credit Card Number and Expiration date fields. When AVS is on or required, after you have successfully entered in the ZIP code, the digits entered will replace the ZIP code label on the payment info widget. When CVV is on or required, after you have successfully entered in the CVV code, redacted digits will replace the CVV label on the payment info widget.

Saved Item Sale

- Using your finger, swipe from left to right across the number pad on the screen.
- Select the item(s) and quantity; tap **Done** (Figure 8).
- You will be returned to the main sale screen with the item displayed; tap **Next** to continue.
- Review Totals – Discounts and taxes will be applied if configured; tap **Next** (Figure 4)
- From the Tender page choose **Cash** or **Credit**; tap **Next**.
- For cash sales, tap **Cash**, enter the amount, then tap **Pay**.
- For credit sales either:
  □ Manually enter the card data, expiration date, CVV, and optional installment data, then tap **Pay**.
  □ Attach card reader and swipe the card. Enter the CVV number, optional installment data, then tap **Pay**.
- If the signature capture is enabled, hand the device to the customer so they can sign the signature line.
- If tips are enabled, and the user wants to enter a tip amount, use the slider to indicate the tip amount (Figure 5). You may also select **Other** and enter the tip amount. Tap **Next**.
- The screen will display the Receipt info. The customer enters their email address and taps **Next**, or **Skip** if they did not enter an address.
- The transaction completing message appears, and the customer will hand the device back to you.
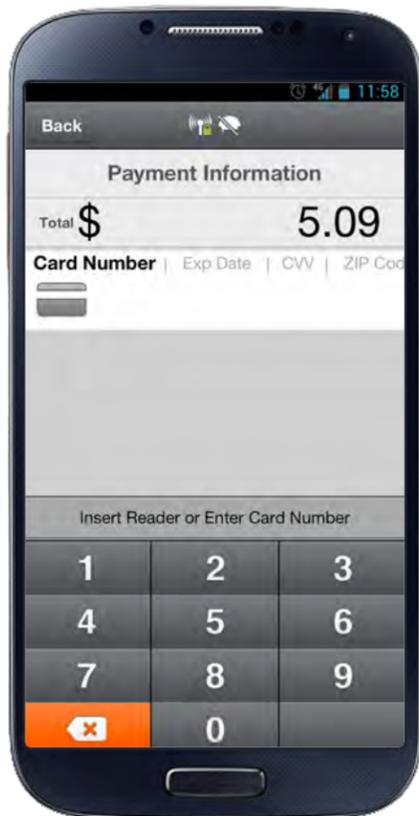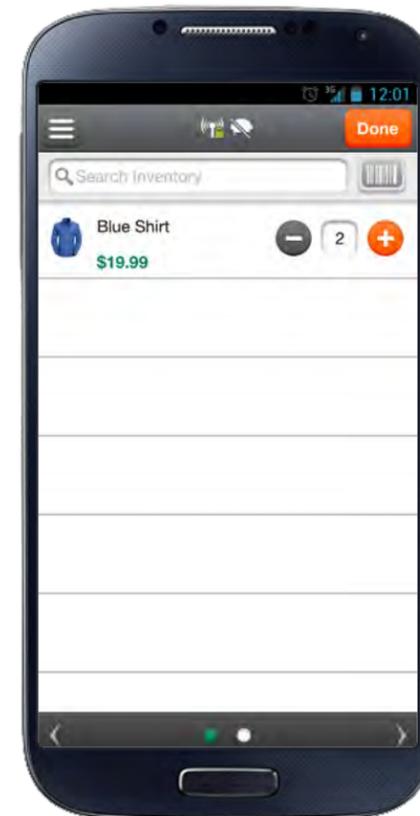
Figure 9

Figure 10

- The next screen is for any notes you want to add to the purchase, and an invoice field. Tap Skip if no information is entered, or **Done** if notes or invoice number are entered. You will be returned to the main sale screen.

You will be returned to the main sale screen.

Adding Barcode-Scanned Items to a Sale

After you add items with barcodes to your inventory, you can scan barcodes when selling those items.

- On the Sale page, swipe the page to the right.

- The next page that appears shows a scan icon next to an empty field that stores the numbers from the item that you scan. The remainder of the page lists the items in your inventory (Figure 9).

iOS

- To scan an item in order to add it to the sale, press the barcode icon. Focus your device's camera on the barcode so that the barcode appears in the green rectangle on the screen.

- Press **Scan Barcodes** (Figure 10). When you're done scanning items, press **Cancel** and check that the item(s) were added to the sales tally.

- Continue scanning items or tap **Next** to complete the sale.

Android

- To scan an item to add it to the sale, press the barcode icon. Focus the device's camera on the barcode, and hold the device until it captures the barcode automatically.

- Press the **Back** button and check that the item was added to the sales tally.

- Continue scanning items or tap **Next** to complete the sale.

Searching for an Item in Inventory

- Go to the main sale screen.

- Swipe the screen to the right.

A screen appears listing items in your inventory.

- Tap **Search inventory**.

Figure 11

Figure 12

- Type the name of the desired item (Figure 9)
  □ The screen lists the desired item if it is in the inventory.
  □ If the name entered in the search field does not match an item in the inventory, nothing appears in the results.

- Select the quantity of the item to add to the sale and tap **Done**.

The main sales screen appears. The item that you searched appears in the sales tally with the appropriate quantity.

Offline Sales

Offline sales are performed in the same manner as online sales, except transactions are not authorized by the processor, and are stored for future upload. There are two ways for offline mode to occur:

- If you lose network connectivity
- If you force the application into offline mode

The application will return to online mode once a connection is reestablished. If you accept payments while in offline mode, the application will automatically prompt you to upload those transactions once connectivity is regained, or when Stay Offline mode is disabled. The offline transactions will then be uploaded in the background and you can continue accepting new transactions (Figure 11).

Losing Network Connectivity

If you lose network connectivity, you will see a message when you login that you are in offline mode. The application will continue, and messages along the process will continue to inform you of offline usage.

Force Offline Mode

If you decide you are in a weak or undetermined network coverage area and want to conduct offline sales, you can use the Stay Offline option in Settings to force the app into offline mode (see Settings Menu section for instructions).

Upload an Offline Sale

Once a sale has been created in offline mode it must be uploaded to the processor for authorization. There are two ways of performing this:
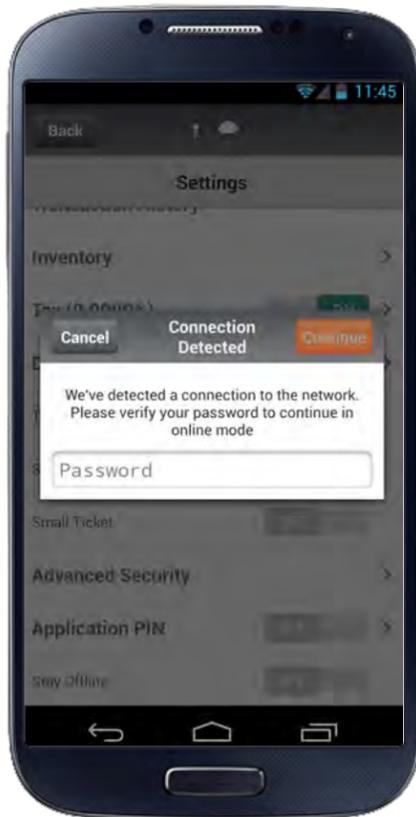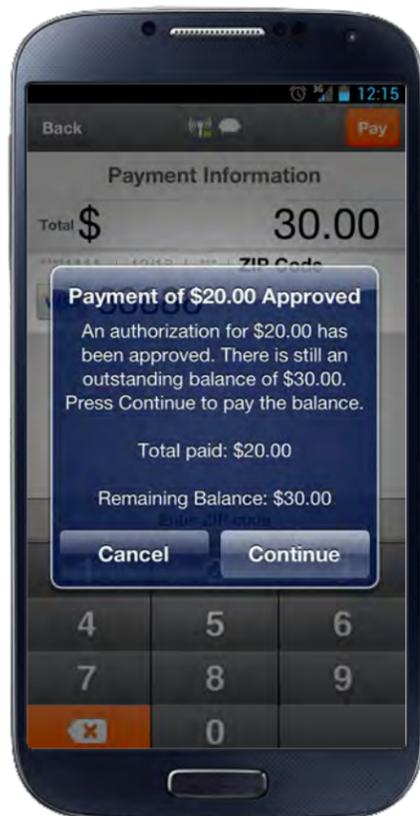
Figure 13

Figure 14

Individual Uploads

- Go to the **Settings** screen.
- Ensure the **Stay Offline** option is set to **Off**.
- Tap **Transaction History**.
- Tap the **Offline Only** button (Figure 12).
- Select the transaction to upload.
- Tap **Upload**.

The selected transaction will be uploaded.

Logging In Offline Mode

- Ensure the **Stay Offline** option is set to **Off**.
- Log out of the application.
- The next time you log into the application you will receive the message that you're in offline mode, and ask if you want to continue. Tap **Yes**.
- Enter your password in the pop-up dialog box to confirm your identity (Figure 13).
- A message displays to let you know that you have stored offline transactions, and asks if you want to upload them. **Tap Upload**.

All offline transactions will be uploaded.

If there is an interruption in network connectivity during the upload process, you will receive a notification. Once you have network connectivity the upload process will automatically resume.

Important Notes

- When offline, you cannot perform a void or refund as the transaction history is not available.
- Offline sales are not authorized until uploaded, and therefore potentially a risk the card data is incorrect or the card will not authorize.
- If software or hardware issues occur, the offline trans actions may be lost and there is no means to recover them. Ensure that you have details to recreate the transaction.

Partial Authorization Transactions

- Enter the amount of the sale in standard dollars and cents format; tap **Next**.
- Review Totals – Discounts and taxes will be applied if configured; tap **Next**.
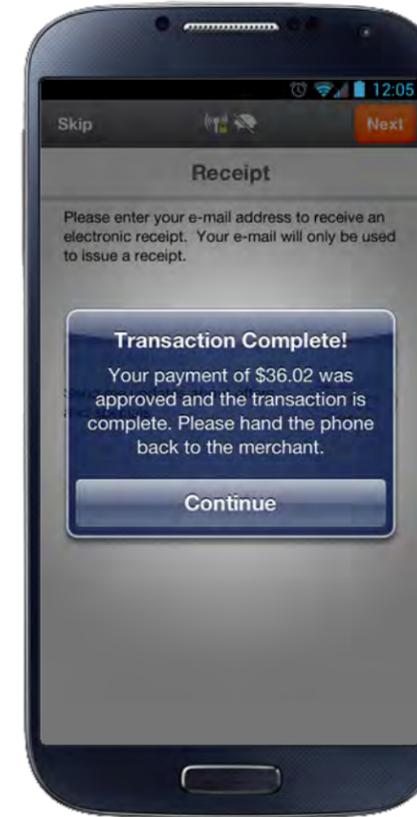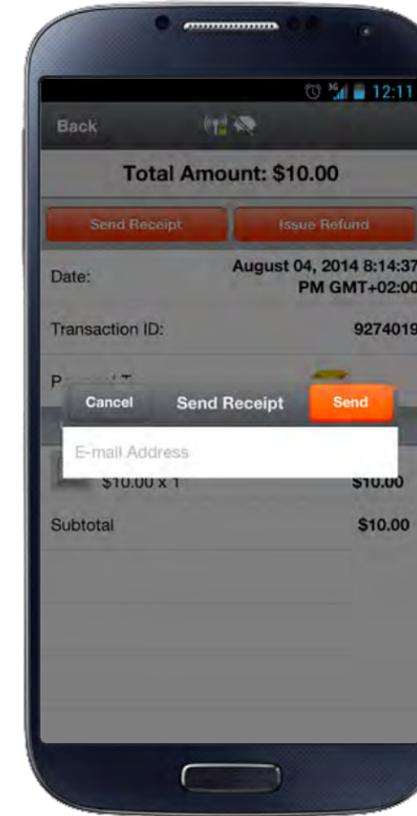

Figure 15

Figure 16

- From the Tender page choose **Cash** or **Credit**; tap **Next**.
- For cash sales, tap **Cash**, enter the amount, then tap **Pay**.
- For credit sales either:
  □ Manually enter the card data, expiration date, CVV, and optional installment data, then tap **Pay**.
  □ Attach card reader and swipe the card. Enter the CVV number, optional installment data, then tap **Pay**.
- If the signature is enabled, hand the device to the customer so they can sign the signature line.
- If tips are enabled, and the user wants to enter a tip amount, use the slider to indicate the tip amount. You can also select **Other** and enter the tip amount. Tap **Next**.
- The partial authorization message appears, stating the transaction amount approved, and the outstanding balance. Tap **Continue** to move to the next screen to enter additional payment information, or **Cancel** to cancel the transaction (Figure 14).
- Enter credit or cash payment information. If the customer pays with a credit card, you will see an additional signature screen. Hand the device to the customer to have them sign the signature line, they will then return the device to you.
- The screen will change for Receipt info. Enter the customer's email address and tap **Done**, or, select **Skip** to not enter an address.
- The transaction completing message appears, and the customer will hand the device back to you (Figure 15).
- The next screen is for any notes you want to add to the purchase, and an invoice field. Tap **Skip** if no information is entered, or **Done** if notes or invoice are entered.

You will be returned to the main sale screen.

NOTE: The email receipt will contain a signature for each card used to complete the transaction.

Transaction History

Transaction History displays the history of your transactions for you to review, perform refunds, or resend a receipt to a customer. You may select a transaction from the history by touching the transaction, which will expand the view. Scroll the screen to view the entire page.
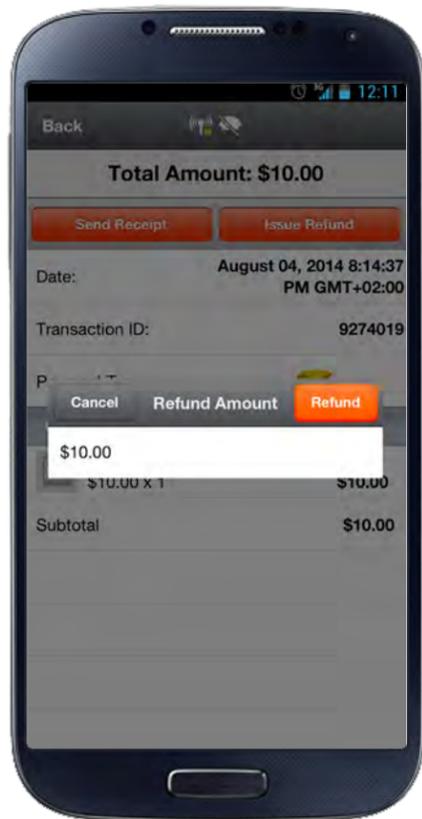
Figure 17

Figure 18

Resending a Receipt

From the **Transaction History**, select the transaction. Tap **Send Receipt** and enter the customer's email address in the pop-up window. Tap **Send**, then tap **OK** (Figure 16).

Searching for an Item by Amount in the Transaction History

- Go to the Settings menu.
- Select **Transaction History**.
- Tap the field at the top of the page containing the default string "Search Transaction History."
- To search by transaction amount, type the exact amount.

The screen lists all transactions for that exact amount. If there are no transactions for the amount entered, nothing appears in the results.

- Tap an individual transaction in the list to bring up the details.

Voiding a Transaction/ Issuing a Refund

When you need to refund a transaction, the app will determine if the transaction is voidable first. If it has already been settled, the app will perform a refund.

To void a transaction/issue a refund, from the **Transaction History** screen open the transaction and tap **Issue Refund**. You can issue a full void/refund, or partial amount of the sale, not to exceed the total amount of the sale. Enter the amount of the refund and tap **Done** (Figure 17).

NOTE: Refunds can only be performed while online.

Settings Screen

Merchant Profile

Merchant profile allows the merchant to modify the information on the customer receipt (Figure 20).

- Logo – Tap **No Logo Has Been Chosen**. On the pop-up window tap **Existing Photo** and search your device for the photo to be used. The logo must be 5MB max, PNG or JPG formats accepted.
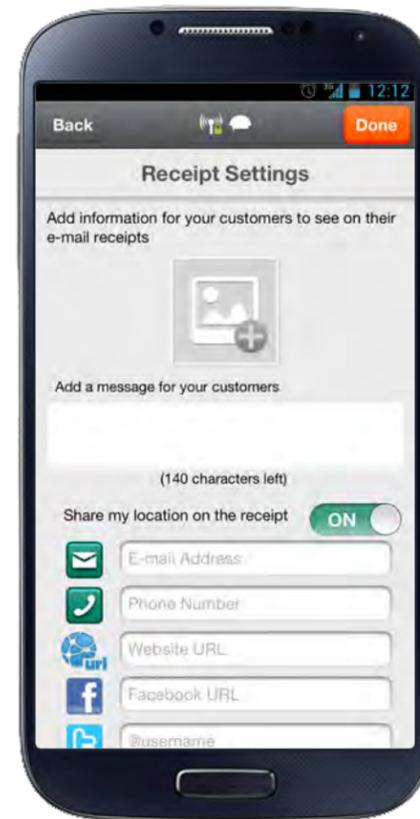

Figure 20

- **Add Location** – Tap the **On/Off** slider next to **Share my location on the receipt** to toggle between the options.
- **Add a Message** – Tap **Add a Message** and enter the message you wish to have on your receipt. There is a 140 character limit.
- **Email** – Tap in the **Contact E-mail** field and enter your email address.
- **Phone Number** – Tap in the **Contact Phone Number** field and enter your phone number.
- **Website URL** – Tap **Web Site URL** and enter the web site address.
- **Twitter** – Enter your Twitter username without the @ symbol.
- **Facebook URL** - Tap **Facebook URL** and enter the Facebook URL.

Tap **Done** to save the changes.

NOTE: You must be online for your changes to take effect.

Inventory

Inventory gives you the option to store commonly used items for easy and quick access. To create an inventory item tap **Inventory** from the Settings screen. You may add or modify inventory items on this screen (Figure 21). Inventory is local on the device and does not deduct from an inventory count.

Add an Item

- Tap **Add New Item**.
- Add new item information:
  □ Photo
  □ Item name
  □ Amount per item
  □ Description
  □ Tax or not tax
  □ SKU number
- Tap **Save** (Figure 22).

Modify an Inventory Item

- Tap on the item to be modified.
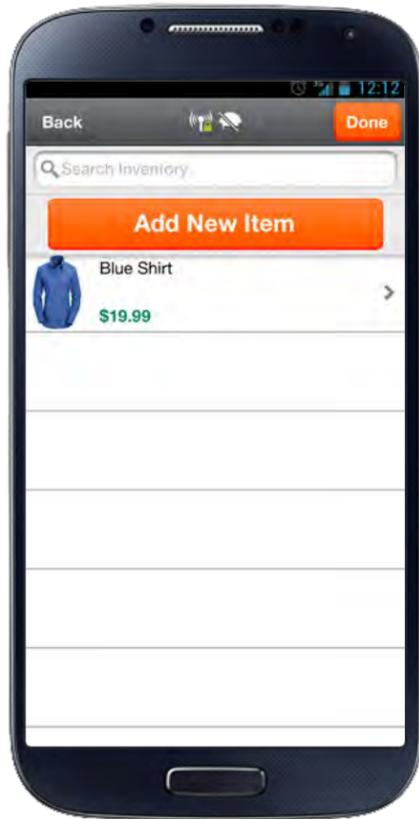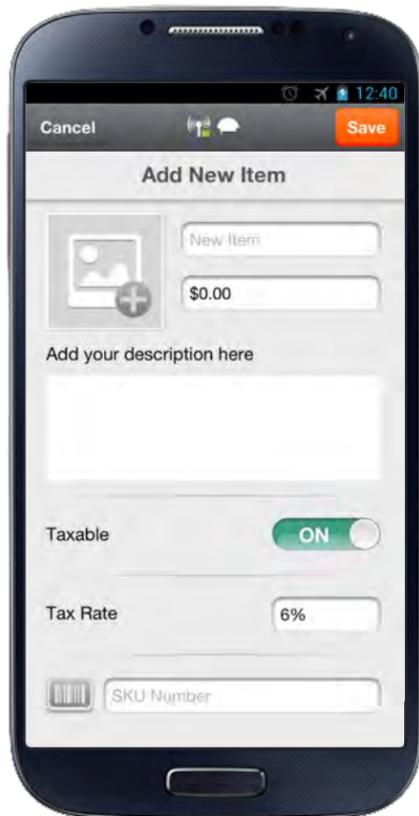- Modify the fields as required.
- Tap **Save**.

Figure 21

Figure 22

Delete an Inventory Item
- On an iOS phone, swipe your finger from left to right across the item to be deleted. On an Android phone, press and hold the inventory item.
- A **Delete** key will appear to the right of the item.
- Tap **Delete**.

Setting Up Items in Inventory for Barcodes
You can set up items in your inventory so you can scan barcodes when you sell these items instead of manually entering item information.
- From the Settings menu tap **Inventory**.
- Tap **Add New Item**.
- In the Add New Item screen, enter the following:
  □ New item field
  □ Price
  □ Description
  □ Turn on the **Taxable** button, if applicable
- Tap the scan icon and focus your device's camera on the barcode.
- When the camera captures the barcode information, the associated numbers appear in the field next to the scan icon.
- Tap **Save**, then **Done**.

Continue adding any additional items

Tax
The tax amount may be enabled or disabled. From the **Setting** screen tap the **On/Off** slider next to Tax to toggle between the options.

NOTE: The slider may be a checkbox on earlier versions of Android.

Configuring Tax Amount
- Turn Tax **On**.
- Tap anywhere on the Tax area.
- Tap on the new pop-up window.
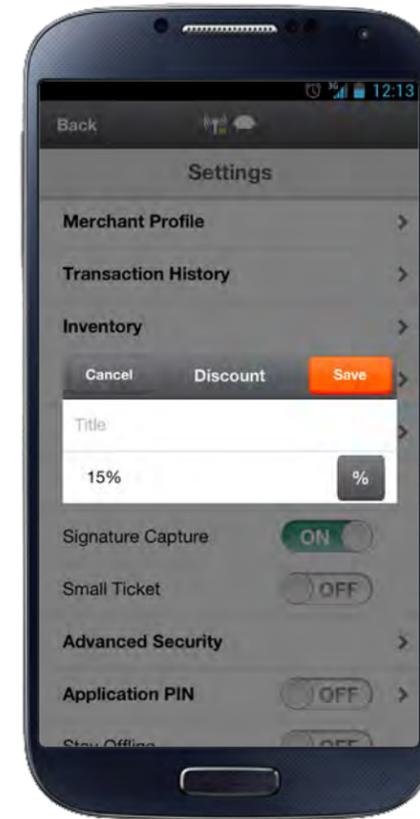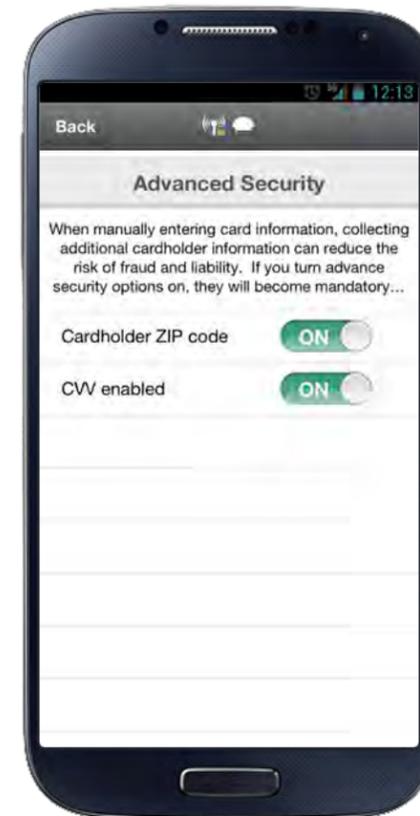- Enter tax amount.
- Tap **Save**.

Figure 23

Figure 24

Discount
The Discount amount feature may be enabled or disabled. From the **Settings** screen tap the **On/Off** slider next to Discount to toggle between the options (Figure 23).

NOTE: The slider may be a checkbox on earlier versions of Android.

Configuring Discount Amount
- Turn Discount **On**.
- Tap anywhere on the Discount area.
- Tap on the new pop-up window.
- Enter **Discount amount**.
- Tap **Save**.

Tips
The Tip feature may be enabled or disabled. When enabled, the tip option will be available during a transaction. From the Settings screen tap the On/Off slider next
to Tip to toggle between the options. NOTE: The slider may be a checkbox on earlier versions of Android.

Signature Capture
The Signature Capture option may be enabled or disabled. When enabled, the Signature Capture option will be available during a transaction. From the Settings screen tap the **On/Off** slider next to Signature Capture to toggle between the options. **NOTE:** The slider may be a checkbox on earlier versions of Android.

Advanced Security
Collecting additional cardholder information can reduce the risk of fraud when manually entering card information. Enabling the Advanced Security feature makes the Zip Code field mandatory for manually-entered transactions (Figure 24).

Application PIN
The Application PIN feature may be enabled for added security. When enabled, you will be required to enter the PIN number prior to using the application. To enable this feature, from the **Settings** screen tap the **On/Off** slider next to Application Pin to toggle between enabling and disabling it.
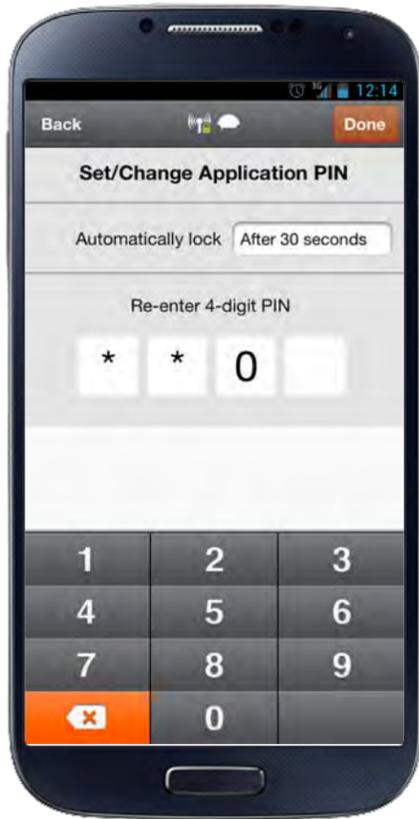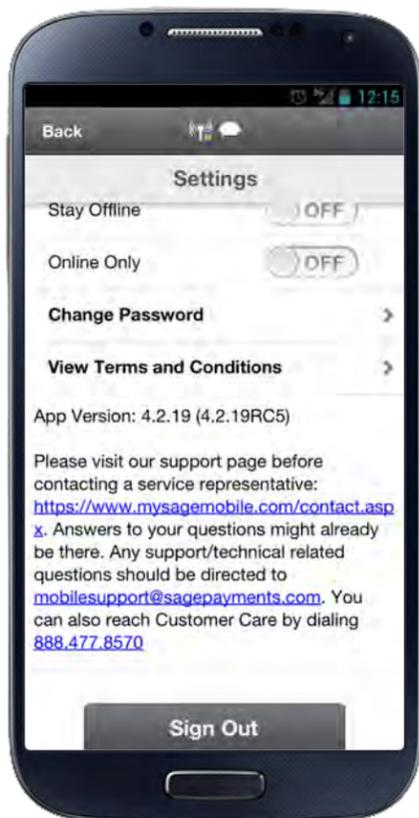
Figure 25

Figure 26

NOTE: The slider may be a checkbox on earlier versions of Android.

Configuring the Application PIN (Figure 25)

- Tap on the Application PIN area.
- Select the time you want the application to auto lock by tapping on the **Automatically Lock** time area.
- Enter your 4-digit PIN number.
- Tap **Done**.

Stay Offline

This option allows the user to remain in offline mode. Offline (also known as Store and Forward) will store transactions in the application for times where a network connection is not available, or very weak. This keeps the application from seeking a network until the user decides otherwise. Transactions may be uploaded when a usable network signal is available on the device (Figure 26).

NOTE:

- Offline mode does not authorize transactions until they are uploaded.
- Stored transactions may be lost if device or software failure occurs.
- User takes full responsibility for the offline transaction and the ability to rerun the transaction.
- There is no means to remove a transaction if the upload fails.

FAQs

Sage has created an online repository of Frequently Asked Questions (FAQs) that demonstrate how to perform basic functionality in Sage Mobile Payments. These FAQs are hosted on mysagemobile.com/faqs.aspx and the pages are mobile optimized. The FAQs cover various topics (e.g. Managing Your Account, Voids and Refunds, etc.) and include explanations as well as screenshots demonstrating everything from performing a basic credit sale to resetting a password. Sage Mobile Payments will have a link in the settings menu which will allow you to launch the browser directly to the FAQs page.

Sign Out

To sign out of the application, scroll to the bottom of the Settings screen and tap **Sign Out**.

Figure 28

Figure 29

mysagemobile.com

Overview

mysagemobile.com is a web portal which allows you to view and manage your transactions as well as perform various account management tasks. Upon log in you will be able to display all your transactions as well as view the receipts for these transactions, perform a refund or manage account information such as editing your business' receipt template, changing contact information and more.

This guide will outline the various features that are available to you in mysagemobile.com as well as give you some examples of how and when these features can be used. (figure 28) shows the initial login screen.

Language Selection

When you load mysagemobile.com's log in page, the browser will load the page in the default language of your browser (if supported). After you log in to mysagemobile.com you will be able to change the language in which mysagemobile.com is displayed. This selection will become the default language for the portal. Every time you log in, mysagemobile.com will load in the language you last selected in your previous log in.

You can change the language in which mysagemobile. com is displayed at any time by looking for the flag in the top left corner of the page (next to the logout link) and then selecting the language in which you would like mysagemobile.com to be displayed from the list of supported languages as shown in (figure 29).

Dashboard

After you first login to mysagemobile.com you will land on the App Dashboard (figure 29). The **App Dashboard** allows you to log into the Virtual Terminal (if enabled in your mysagemobile.com account, depending on the settings of your account), or to view history of your transactions by clicking one of the two buttons on the dashboard page.
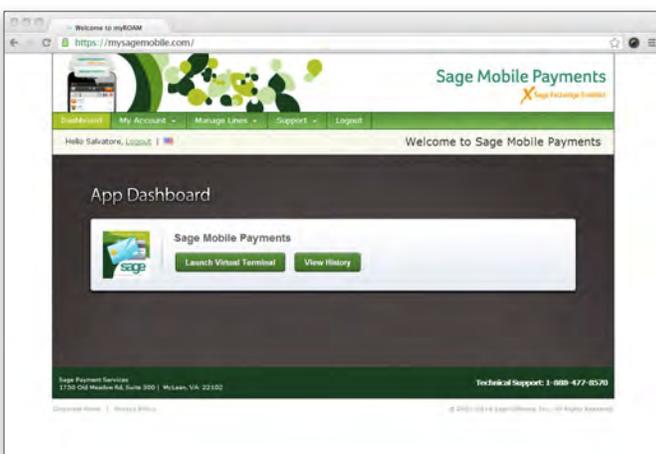
Figure 30

Virtual Terminal

The Virtual Terminal is a web application that allows you to run transactions similar to the mobile app. If the virtual terminal is available to you, click the **Launch Virtual Terminal** button to launch it. If the Virtual terminal is not available to you, you will not see this button on the dashboard page.

Transaction History Table

Click the **View History** button to display a list of all your transactions (Figure 30). When logged in as a masterline you can view the transactions for each or all of your sublines by using the drop-down menu in the top right corner. When logged in as a subline or if subline management is not available on your account you will only see your own transactions and a drop down will not be available on the top right.

Use the drop-down menu in the upper left corner of the page to change the number of entries displayed. Use the Filter by Date Range fields to search for transactions during a specific time period. Click on a column title to sort your transactions.

You can use the Search field in the top right corner to search using free text search. You can search for a specific transaction or type of transaction. For example, type MasterCard to view all MC transactions, type in "refund" to see all the refund transactions. You can type a transaction's dollar amount, transaction ID, the last four digits of a credit-card, and more, to locate a specific transaction.

If the customer gave you personal information such as email, mailing address or phone number during the transaction, you will be able to locate a transaction by searching with this information and depending on which reader you used you might be able to search by cardholder name as well.

The transaction history table will show a condensed view of all the transactions. To view the details of a specific transaction, click anywhere on the transaction row. To close the transaction details window click on the row again.

You can export to a .csv file or print the transaction list using the buttons in the upper left corner of the page. When there is no search or filter in the transaction
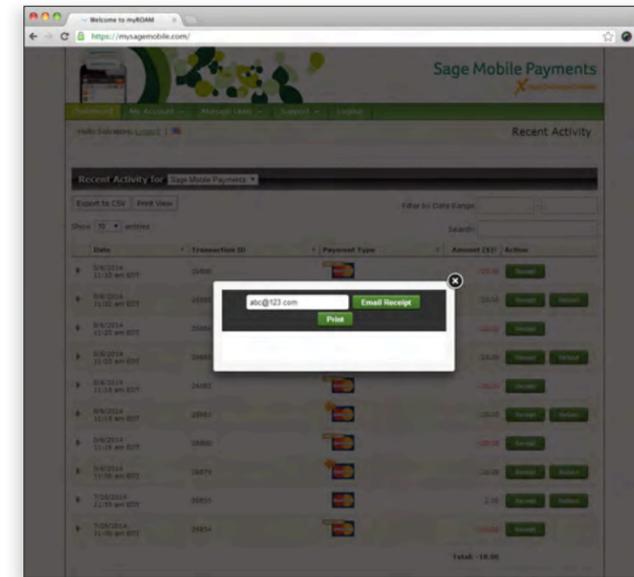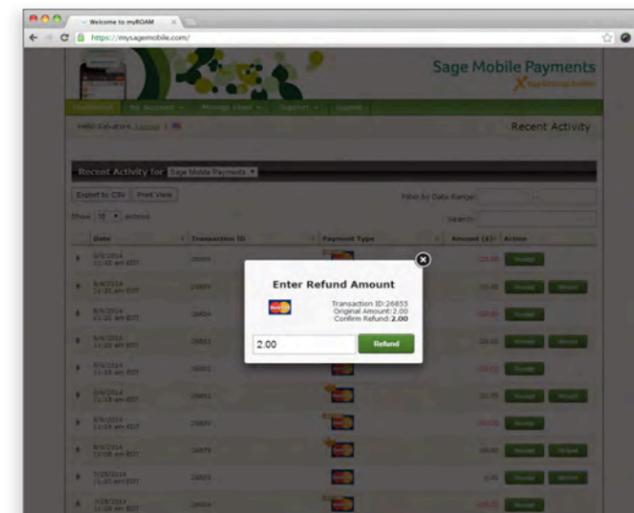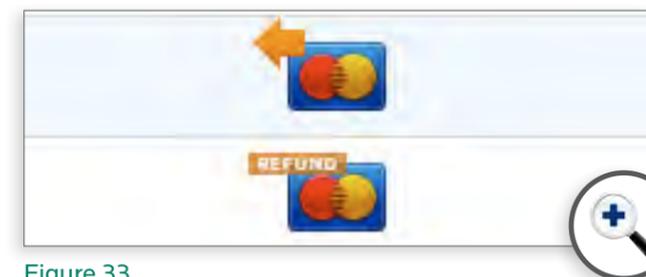

Figure 31

Figure 32

Figure 33

Figure 34

history table, the export will display in the report all available transactions up to 1,000 transactions. If only a partial list is displayed because of a keyword search or a filter, only that partial list will be exported.

If you're logged in as a masterline you can export a report for each subline separately or all sublines in one report.

Receipt

You can view the receipt (Figure 31) for each transaction by clicking the **Receipt** button located on the right in the transaction history table. To send the receipt to a customer, click the button, enter the customer's email address and click the Email Receipt button. If a customer email address was previously entered, it will be pre-populated. You can print the receipt by clicking the **Print** button.

For transactions performed using a certain terminal model, a compliant PDF receipt will also be available. When you click on the receipt button in transaction history the pop up that opens up will enable you to email an html receipt with a PDF attached, print the html receipt or save the PDF receipt to your computer.

Refund

Depending on the settings of your mysagemobile. com account you may or may not be able to perform refunds. If you are able to perform refunds a refund button will be visible. To issue a refund for a transaction, click the **Refund** button located on the right in the transaction history table. When the dialog box displays (Figure 32), enter either the full or partial amount to be refunded, click the **Refund** button, then confirm the refund, by clicking the "Refund Now" on the next screen. A partial refund for an unsettled transaction will not be permitted.

Once the refund has been issued an orange arrow displays at the top left corner of the Payment Type icon in the original transaction. A new transaction will be created for the refund transaction and "Refund" in orange will appear on the payment type icon (Figure 33).

When a transaction is performed in offline mode and gets declined (an "**offline decline**") a red decline bar will appear on the top left corner of the payment type icon (Figure 34).
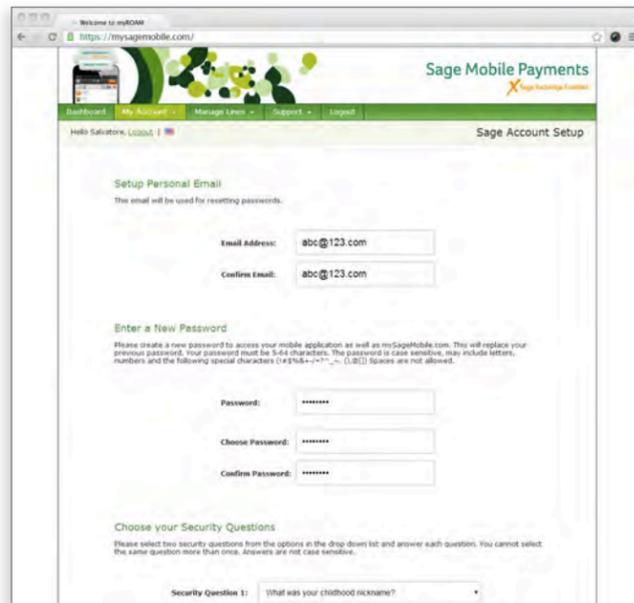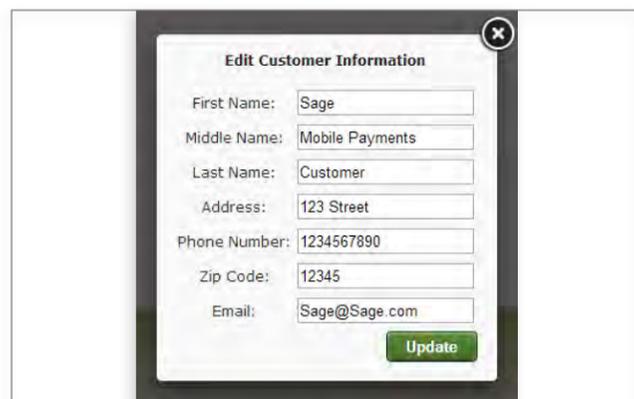
Figure 35

Figure 36

Figure 37

My Account

This contains the following links:

- Account Setup
- My Customers
- Edit Email Receipt
- Edit Merchant Information
- Edit Billing Information

Account Setup

Use this page (Figure 35) to setup (**1**) a personal email that will be used in case you need to reset your password, (**2**) your password, which will be used to access the mysagemobile.com site as well as your mobile application, (**3**) your two security questions which will be used if you need to reset your password as well as for identification purposes if you call technical support.

My Customers

Depending on the settings of your mysagemobile.com account, a list with your customers' contact details may be available to you.

Use this page to review your saved customers list including customer name, address and phone number (Figure 36).

You can also Edit or Delete a customer record from this page. To edit customer information, click the Edit button, enter your changes in the pop-up dialog box, then click Update (Figure 37). To delete a customer record, click the Delete button, then confirm your delete by clicking the OK button.

Saved customers' information will not be used for recurring billing, it is for marketing purpose only.

On the bottom left corner select Export to .csv to export your customer information in spreadsheet format, or, select Print to print a report.

Edit Merchant Information

Use this page to change information such as your phone number and email. Depending on the settings of your mysagemobile.com account you might also
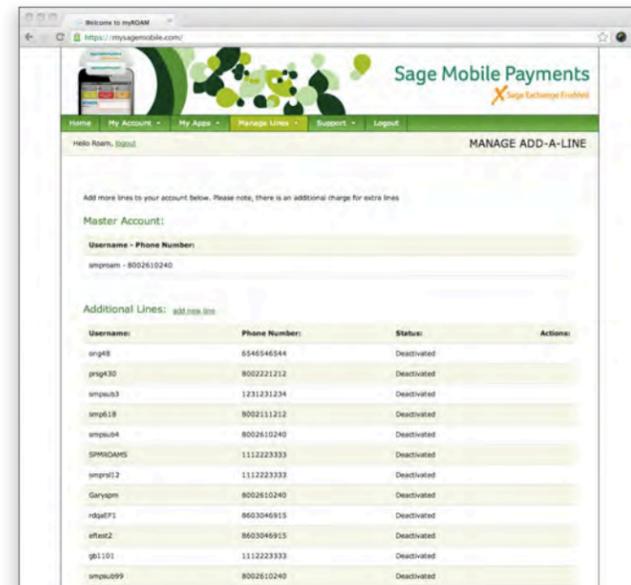

Figure 39

be able to modify your DBA name and DBA address. If so, those fields will appear as editable on this page. Otherwise you will see them as view only fields. If you need to change your DBA name and address and this option is not available to you on this page, please contact your Merchant Service Provider.

Edit Billing Information

This page allows you to change the way your Sage Mobile Payments fees are deducted. You can choose to be billed via ACH (checking account) or credit card.

NOTE: This option may not be available for certain merchant providers.

If your billing information is not correct and the account becomes delinquent, your account can be deactivated. This does not affect how your funds are deposited as Sage Mobile Payments does not handle funding.

Manage Lines

Depending on the settings of your mysagemobile.com account you might be able to manage sublines on your account. If this functionality is available to you, you will see a "Manage Lines" tab in mysagemobile.com.

Use the **Subline Settings** page to view and manage your sublines (Figure 39). Use the Search field to search for a specific subline. Depending on your account setup you may be able to add a line by clicking an "Add New Line" button. If this button is not available and you would like to add a new line, contact your merchant account provider.

Can Refund: Check the "Can refund" box to allow a subline to issue refunds. The "Can refund" column only displays when the feature is enabled to you.

Send Receipt: As a masterline you can determine who will receive the receipts: you, your sublines or both of you.

De/Activate: You can deactivate or activate each subline and depending on the version of mysagemobile.com account that you are using you might be able to move a subline to reassign it to a different user.

Using the Virtual Terminal

The Virtual Terminal allows you to accept card-not-present and cash payments in mysagemobile.com when your mobile phone is not available, or when there is no wireless connectivity.

To reach the Virtual Terminal, click the **Launch Virtual Terminal** button on the Dashboard.

To conduct a card-not-present or cash transaction:

1. Enter the amount of the transaction

2. Enter the amount of the Discount, Tax and Tip. Choose percentage or dollar amount by clicking the corresponding button.

3. Choose a payment type of **Cash** or **Credit**.

   a. For Credit payment enter Card Number, Expiration Date, CVV, Zip/Postal Code and optional email address

   b. For Cash payment enter Cash Amount and optional email address

4. Enter an Invoice Number and Description. Check the check box to include this information on the customer receipt.

5. Enter the customer information.

6. Click the **Review Order** button. If the information displayed is correct click **Make Payment**, otherwise click **Cancel** and correct the information.

Once you click the Make Payment button the transaction information will be available in your Transaction History.

Support

This tab has the following categories:

- Helpful Documentation
- Terms of Usage
- FAQs
- Contact Us

Helpful Documentation

User guide and Reader instructions booklet are available on this page. This user guide can be found in this section.

FAQs

The FAQ link opens the Sage Mobile Payments Help Center in a new browser window. The FAQs are arranged by category, and provide information on getting started, managing your account, using key features in the mobile application and mysagemobile.com.
The same Sage Mobile Payments Help Center page available from the FAQs is also available from the Contact Us page.

Terms of Usage

The terms and conditions on this page are the same set accepted when signing up for the Sage Mobile Payments application. They are displayed here for general reference.

Contact Us

Most issues can be resolved by contacting your merchant service provider. Please contact them for all questions, including training, funding, and fees.

If you're unable to resolve your question or problem via your merchant service provider, use the online form on the "contact us" page to email Sage Mobile Payments's technical support.

Logout

Click this tab to log out of mysagemobile.com.

Supported Browsers & Screen Resolution

Supported Browsers

mysagemobile.com is supported on the following browsers: The latest version of Chrome, Safari, Firefox and Opera, as well as IE8 and above.

Resolution

mysagemobile.com has a fixed width of 960 pixels. You can view it on any sized screen. If the screen is wider than 960 pixels, it will have white space on either side. If you view it on a screen narrower than 960 pixels, you will have to scroll left and right to see the whole screen.

Contact

For sales inquiry:
1.888.477.8570

Customer support:
mobilesupport@sagepayments.com

General inquiry:
mobilesupport@sagepayments.com

More Information

Web:
mysagemobile.com

Supported devices:
devices.roamdata.com

sage