



Professional Edition
(Release version 3.11x)

**Palm OS – MAC Tools Special Edition
User Guide**

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Table of Contents

Pocket CrossCheck™ Professional End-User License Agreement (EULA)	2
Table of Contents	3
Welcome	1
Installing Pocket CrossCheck	1
PC Installation	1
Palm Installation	2
Activating a Store Account	2
Activating a Store Account	3
Introduction	3
Tutorial	3
Activating a Second Store Account	5
Logging On to Your Store Account	5
Menu Screen Functions	6
Your First Mobile Check Guarantee	7
Introduction	7
Tutorial	7
Working with an Approved Check	10
Working with a Declined Check	11
Working with Transactions in a Weak/Non-Wireless Area.....	11
Making a Sale with a Physical Driver's License	13
Introduction	13
Setting Up Your Palm for Quick Sales.....	13
A. Automatically Launch Pocket Verifier Professional:.....	13
B. Bypass the Log-On Password.....	14
C. Attach PalmReader Plus or Pocket Merchant	14
Performing Swiped Check Guarantee	14
Working with an Approved Check	16
Using the Transaction Manager	18
Introduction	18
Tutorial	18
To open the Transaction Manager.....	18
Overview of the Transaction Manager	18
Working with Un-Approved Transactions from the Transaction Manager	19
Introduction	19
Tutorial	19
Using Options	20
Setting up a Card Reader.....	20
Setting up a Printer	20
Use Hard Buttons.....	20
Deleting All Data for a Single Merchant Account	21
Deleting All Merchant Accounts and Data	21

Pocket CrossCheck Tutorial

(Palm OS Edition)

Welcome

Welcome to Pocket CrossCheck. This document is a step-by-step tutorial outlining the major features of Pocket Verifier Professional. Each tutorial takes under 10 minutes to perform. As such, it is recommended that you use these tutorials along with your PDA. Please note: NOTHING in this document is intended to supersede or alter the CrossCheck agreement. If there is any discrepancy between the procedures outlined here and CrossCheck directives, the CrossCheck directives take precedence. AMSI and its affiliates assume no liability for transactions, or the inability to perform transactions with this software. Please check with your CrossCheck agreement carefully before using this software.

Installing Pocket CrossCheck

Please follow the instructions below to install Pocket CrossCheck onto your PDA device. This is a two step process. The first process is to load the installation file onto your Palm. The second is to run Palm-based installation.

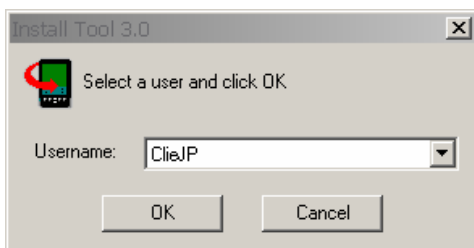
Note:

It is assumed that you have already installed the Palm software that came with your PDA and that you have successfully performed at least one Hotsync between your PDA device and the computer you are using to install this software. If not, please consult the documentation that came with your PDA device and set up your system before continuing with this installation.

PC Installation

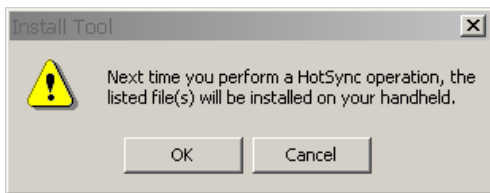
In order to install Pocket CrossCheck onto your device...

1. Download the [Xcheck.prc](#) file.
2. Copy the file to your Windows desktop.
Please see your Windows OS documentation on how to do this



3. Double-click on the [Xcheck.prc](#) file
If your system is setup correctly (see Note above), the Palm Install Tool dialog will appear.
If you have more than one PDA device being used with your computer, you will first need to select the [Username](#), and then click on the [OK](#) button.
4. Click the [Done](#) button on the [Install Tool](#) dialog box.

5. Click **OK** for the message box.



6. Place your PDA device into the Hotsync cradle.
7. Press the **Hotsync** button to load the **Xcheck.prc** file onto your PDA device.

Palm Installation

Once the **Xcheck.prc** file is successfully transferred to your PDA device, **it will automatically start the Palm installation program to extract and setup the correct files and databases.** If you are re-installing the software, your existing transactions will **not** be deleted.

STEPS 8 – 11 SHOULD BE DONE AUTOMATICALLY FOR YOU. THESE STEPS ARE INCLUDED HERE FOR REFERENCE ONLY, OR IF YOU INSTALLED MULTIPLE FILES AT ONE TIME.

8. After a successful Hotsync, remove your Palm PDA from its cradle.
9. Click on the **Applications/Home** button.
10. Select **Unfiled** in the **Categories** dropdown list.
11. Click on the **Xcheck.prc** icon.
The application will launch and require you to activate at least one Merchant account. Information on how to do this is in the next section.

This will finalize the installation process, and create the **XCheck** icon in the **AMSI** Category.



- 1. Click the Applications/Home button



3. Then click on the Installation Icon

Click the **XC Install** icon to create the **XCheck** icon located in the **AMSI** Category.



Activating a Store Account

Introduction

When you first launch Pocket CrossCheck, you will be required to activate at least one account.

In some cases, you may have been given a test store account, while you are waiting for your live store account.

This tutorial uses the demo store account. If you would like to use a demo account to work through this tutorial, please contact your CrossCheck representative. A test account will allow you to try most of the features that Pocket CrossCheck has to offer. It is recommended however, that if you can, use your own account with the examples in this tutorial. The checks and amounts used in this tutorial for credit card transactions are for testing purposes only. **Please check with your representative to see what credit card numbers and/or merchant account(s) you can use for testing purposes.**

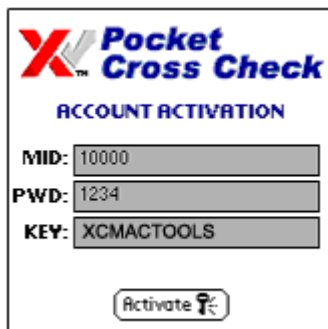
When you first run Pocket CrossCheck, you will see the following presentation of screens. Click the **OK** button to show the **Account Activation** screen.



Tutorial

1. Enter your **Store ID** in to the **MID** text area. (test account is 10000)
2. Enter your **ZIPCODE** into the **PWD** text area. (test account is 1234)
3. Enter your **Activation Key** into the **Key** text area. **USE- XCMACTOOLS**

Pocket CrossCheck incorporates extremely high security checking and processing for transactions. Note that the information entered below is for demonstration only. Your account information will differ from the information presented in this tutorial.



Note:

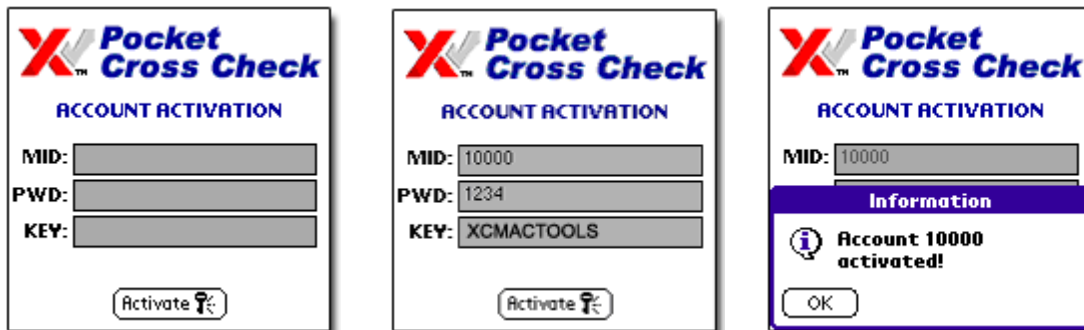
When starting the communication process, your PDA may display additional messages. The exact message you will see at this point will vary from PDA to PDA.

If you use the Treo 300, you may need to press the button at the top next to the antenna, which will give you the Sprint "Welcome" Screen.

Other devices, such as the Treo 600, 650 and Harrier may show a phone icon, and inform you that they are dialing or connecting to the host provider.

4. Click on the [Activate](#) button.

This will result in a communication 'hop' to the Account Activation server. If your PDA device is not set up properly, a message box will display the problem (i.e., antenna charging, batteries too, IR port not open, etc.). If successful, a message box will request a name verification of your merchant account.



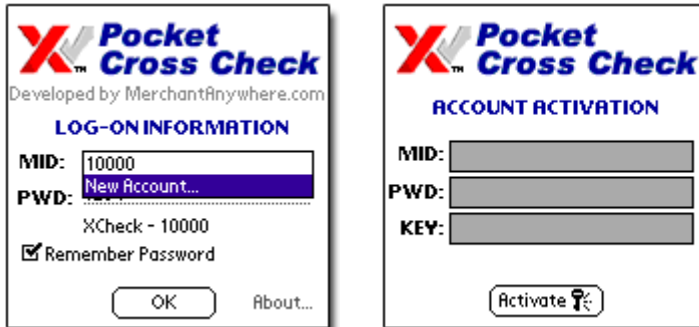
5. Click on the [OK](#) button.

Your account becomes activated and if you are using the test account, a message box appears indicating that any transactions processed will not actually occur.

Activating a Second Store Account

If you activated a test account, you can always activate another account at anytime from the [Log-On Information](#) screen. Simply follow the steps below.

1. Click on the [Merchant ID](#) drop-down list box.
2. Select [New Account...](#) in the list.
This displays the [Account Activation](#) screen.

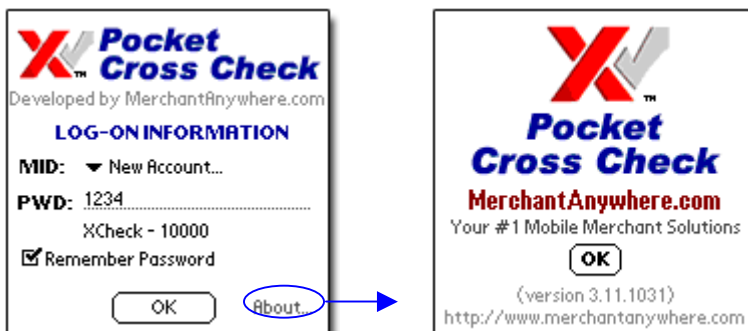


3. Follow the steps outlined in the above section: [Activating a Merchant Account](#).
Upon completion, your new Merchant ID will be available in the [Merchant ID](#) drop-down list.

Logging On to Your Store Account


Once you have activated at least one account, it is necessary to log on with your Store ID and Zipcode before you can make credit card sales or transfer money from an account. To log on to your account and display the [Menu](#) screen...

1. Click on the [Merchant ID](#) drop-down list box ...
If you have more than one Merchant Account activated on your PDA.
2. Select the account you want to use.
3. Enter your password.
If you just finished activating and registering your software, your password (zip code) will already be displayed and the [Remember Password](#) check box will be checked. Thus, each time you log on to this store account, your password will be shown. The password check box is dependent on the Store ID (i.e., you can choose to remember a password for one Merchant ID and not another).



4. Click on the [OK](#) button from the [Log-On Information](#) screen. This brings you to the [Menu](#) screen where you can perform sales using credit cards, transfer funds from checking or savings accounts, enter the [Transaction Manager](#) (see: [Using the Transaction Manager](#)), and set up options. Information related to this screen is shown below.

Menu Screen Functions



The screenshot shows the 'XCheck - 10000' menu screen. At the top, the title 'XCheck - 10000' is displayed. Below the title is a large red 'X' logo. Underneath the logo, the state 'California' is shown with a dropdown arrow. The screen is divided into two main sections. The left section contains icons for a stack of checks, a magnifying glass, and a dollar sign. The right section contains icons for a printer, a stack of coins, and a credit card. At the bottom of the screen, there are three buttons: 'Log On', 'please swipe card', and 'Exit'. Callouts with blue lines point to these elements and provide instructions.

Click here to enter [DL and Check data Manually](#)

Click here to go to the [Transaction Manager](#) screen where you can review all stored and approved transactions. See: [Using the Transaction Manager](#) for more details.

Click here to go back to the [Log-On Information](#) screen and change to another Merchant Account.

Click here to change your [Options](#), or to remove all data stored in the Transaction Manager for the current Merchant Account.

Click here to [log-off from the current Merchant Account](#) and to exit the software.

Title displays the name of the Store Account. If the name is longer than 25 characters, it is shortened with an ellipsis ...

YOU CAN SWIPE A DRIVER'S LICENSE DIRECTLY FROM THIS SCREEN!

Your First Mobile Check Guarantee

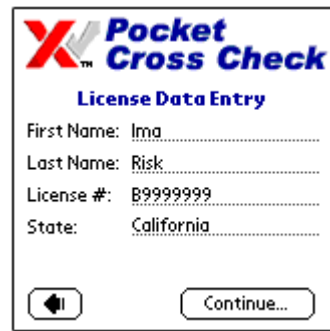
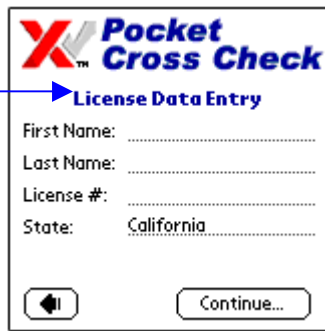
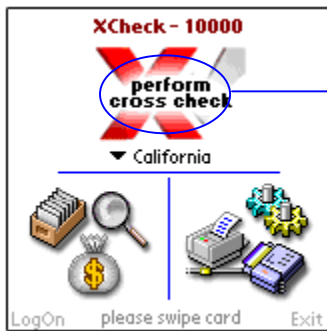
Introduction

In this tutorial you will perform a manual check guarantee. You can follow step-by-step using the test account or your own Store Account, by adding the exact data that is presented here. The Driver's license used in this tutorial is for demonstration purposes only and will not be processed by the system. If you are using the test account, you can also use any Driver's License number - even your own. The test account will not process any transactions. If you want to use a 'live' license number on your 'live' account, you will be charged the check amount's processing fee. If you do not wish to be charged this fee, please use a test account. The tutorial below will use a fictitious driver's license belonging to **Ima Risk**:



Tutorial

1. Log-On to [your Store account](#) or the test account.
2. Click on the [Perform Cross Check](#) picture. This opens the [License Data Entry](#) screen.



3. Enter the following information:

First Name: **Ima**
Last Name: **Risk**
License #: **B9999999**

4. Press Continue.

X Pocket Cross Check
License Data Entry
First Name: Ima
Last Name: Risk
License #: B9999999
State: California
Continue...

In this example, enter a check number of 103

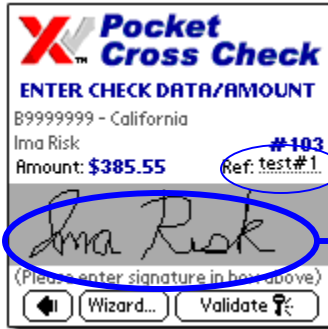
Enter CHK:
103
1 2 3 CLEAR
4 5 6 BKSP
7 8 9 Cancel
00 0 ACCEPT

5. Click on the **ACCEPT** button.

6. Enter the Amount (in this example, \$385.55).

Enter Amount \$:
385.55
1 2 3 CLEAR
4 5 6 BKSP
7 8 9 Cancel
00 0 ACCEPT

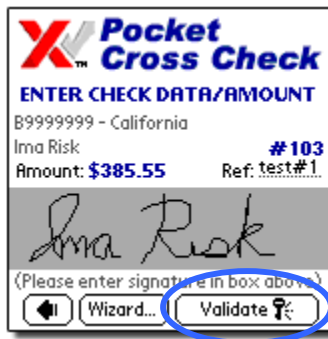
- Click on the [Accept](#) button.
Add a signature (optional).



Optional Reference

Optional Signature

- Click on the [Validate](#) button.



- Click on the [Send](#) button.
The next step in to transmit the data to the transaction server for credit card approval.



You can view the progress of the transmission here

10. At this stage, one of three things can happen:

- The Check gets approved.
- The Check gets declined.
- The transaction cannot be completed, because the server is undergoing maintenance or you are in a weak or non-wireless area.

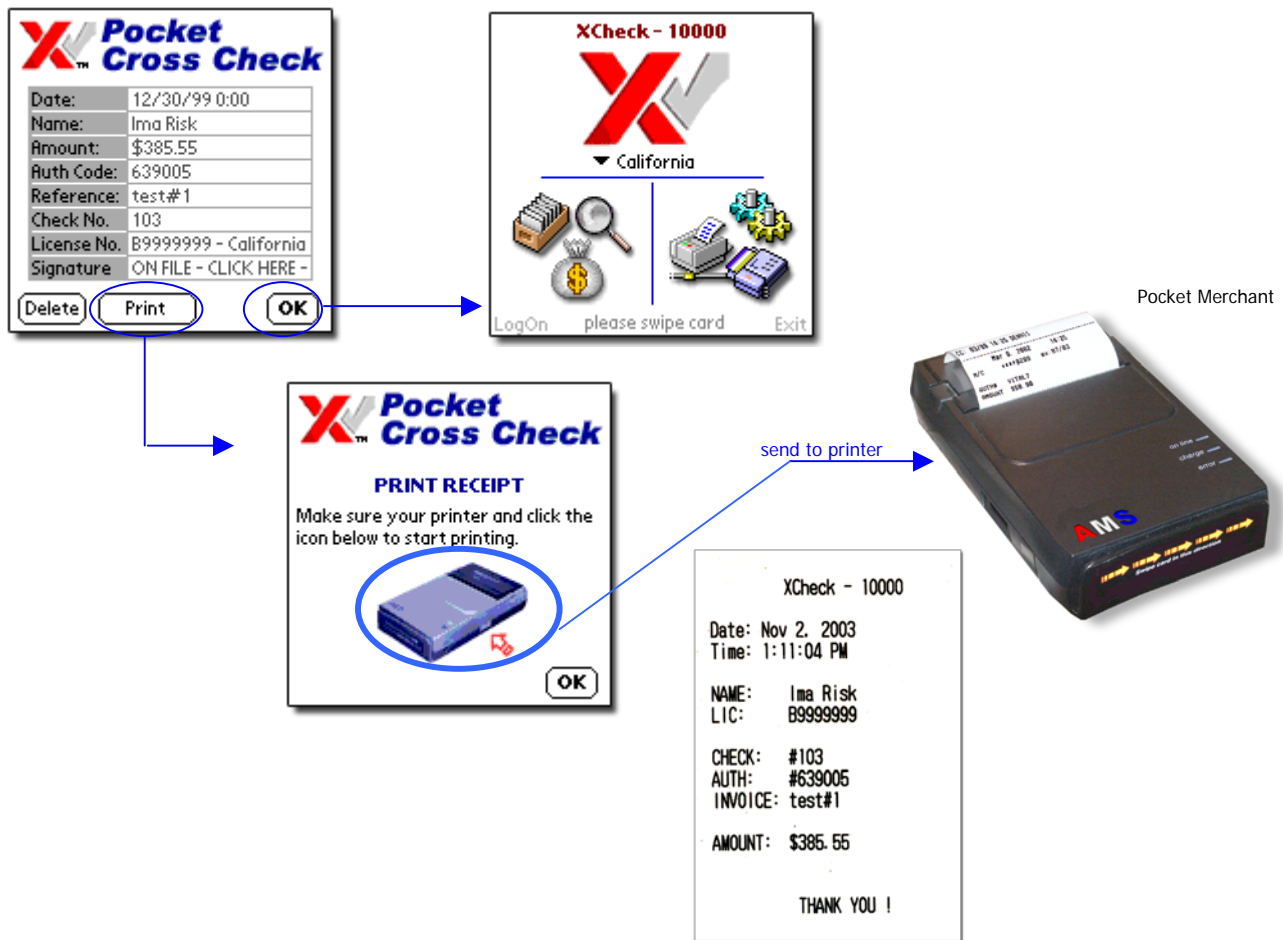
Each of these situations is shown next.

Working with an Approved Check

Once a transaction is complete, Pocket CrossCheck will return an [Authorization Code](#). The transaction is automatically stored as AP (approval) and can be accessed from the [Transaction Manager](#).

The [CrossCheck: Approval](#) screen also allows you to print a receipt. Pocket CrossCheck allows you to print to the Pocket Merchant.

If you do not want to print a receipt, click on the [OK](#) button and return back to the [Menu](#) screen.



In order to complete the process, even if you have printed a receipt, you must fill out the physical check in accordance with CrossCheck procedures. These are depicted below.

For Authorization, make sure ALL the information is on ALL Checks!



Working with a Declined Check

There are a number of reasons you may get one of these messages, some of these could be from incorrect input, or an actual decline from CrossCheck. The format of the response is shown below:



If there is an input error, you may re-enter the data, and try again, if the check is declined, CrossCheck will not guarantee it.

Working with Transactions in a Weak/Non-Wireless Area

There may be times when you are unable to perform a wireless approval for a credit card. Some possible situations are:

- The location you are in may have weak coverage causing a long time for processing to occur.
- The location has no or batteries are too weak to provide a proper transmission.
- The connection may be slow due to heavy traffic on the transaction and validation servers.
- The transaction servers or wireless service may be down for routine maintenance.

For whatever reason, Pocket CrossCheck allows you to stop an existing connection and to store Credit Card information in the [Transaction Manager](#) for processing and validating at a later time. To do this...

1. Click on the [Rotating Connection Indicator](#).

If you are experiencing a long it is recommended that you stop the connection and try again. You can stop a connection anytime you see the [Rotating Connection Indicator](#).

Click on the [Rotating Connection Indicator](#) to stop the current wireless connection.



Connecting to Server

2. Click on the [Store](#) button.

The information is stored in the Transaction Manager. See [Using the Transaction Manager](#) on how to resubmit unapproved sales transactions.

Making a Sale with a Physical Driver's License

Introduction

In the previous example, you made your first sale by entering the driver's license and check information. If you are an experienced Graffiti writer or happen to be using one of the many keyboard add-ons, then entering all this information may not be a daunting task. However, Pocket CrossCheck was designed to make check guarantee sales quickly and accurately in only a few steps. As a matter of fact, you can do everything by using the corner of a credit card instead of your stylus! This tutorial shows you how.

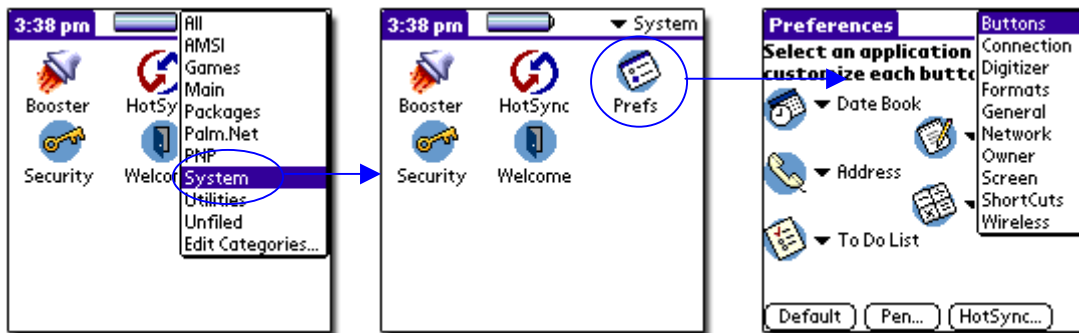
This tutorial assumes that you are using the Pocket Merchant 2-in-1 Credit Card Reader and Receipt Printer. When you first install Pocket CrossCheck, it's already set up to use Pocket Merchant. To select a different reader, go to Options and choose one from the list (see [Using Options](#) for more details).

Setting Up Your Palm for Quick Sales

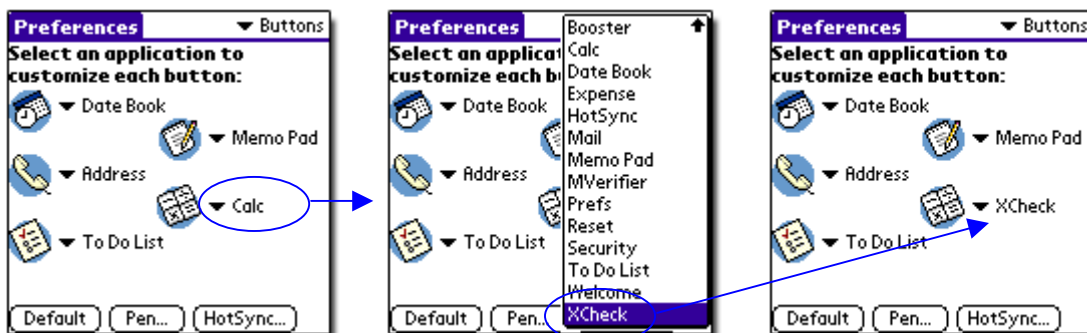
A. Automatically Launch Pocket Verifier Professional:

You can automatically launch Pocket CrossCheck when you press a specific button on the bottom of your PDA. We will re-program the calculator button / icon to start Pocket CrossCheck. To do this...

1. Turn on your PDA.
2. Click on the [Home/Applications](#) button and select [System](#) from the [Categories](#) list.
3. Click on the [Preferences](#) icon and select [Buttons](#) from the [Categories](#) list.



4. Next to the CALC icon, select [Xcheck](#) from the [Applications](#) list box. Now when you turn on your PDA, press the calculator icon, and Pocket CrossCheck will automatically start.



B. Bypass the Log-On Password

Pocket CrossCheck allows you to save your password for each Store ID. If you are in the field or at a customer's location, and do not want to enter your password each time, turn this feature on.



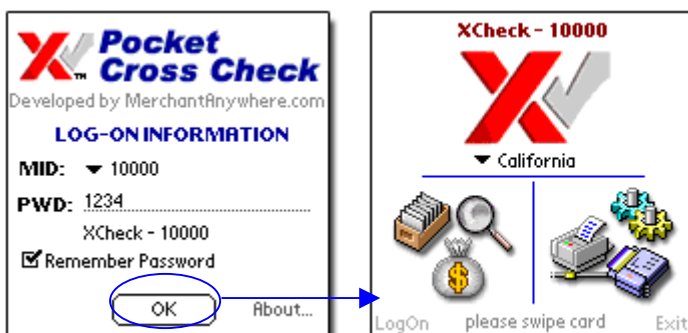
C. Attach Pocket Merchant

To attach Pocket Merchant to you Palm PDA, follow the instructions that came with the device.

Performing Swiped Check Guarantee

After following the [Setting Up Your Palm Quick Sales](#) instructions above, you are ready to see how easy and fast it is to take and validate credit cards for your sales.

1. Press the button to start Pocket CrossCheck..
After a few seconds, Pocket CrossCheck will launch automatically. Note that there may be a small delay before the Pocket CrossCheck splash screen appears. This only occurs when you run Pocket CrossCheck for the first time, since a number of intrinsic files need to be initiated for wireless communications.
2. Click the [OK](#) button.
Again, it is assumed that you followed the instructions above and that the [Remember Password](#) box was checked, allowing the password to be displayed for the current Merchant Account.
3. Swipe the driver's license.



**SWIPE THE
CARD AT
THIS SCREEN!**

4. Swipe the Credit Card through Pocket Merchant (magnetic strip toward the device).
On a successful swipe, multiple tracks of the card data are analyzed and compared for validation. Once validation is complete, the data is automatically transferred to the PDA device and the number pad appears.
5. In this example, enter a check number of 103

Enter CHK:

103

1 2 3 CLEAR

4 5 6 BKSP

7 8 9 Cancel

00 0 ACCEPT

6. Click on the [ACCEPT](#) button.
7. Enter the Amount (in this example, \$385.55).

Enter Amount \$:

385.55

1 2 3 CLEAR

4 5 6 BKSP

7 8 9 Cancel

00 0 ACCEPT

8. Click on the [Accept](#) button.
Add a signature (optional).

Pocket Cross Check

ENTER CHECK DATA/AMOUNT

B9999999 - California

Ima Risk

Amount: \$385.55

Ref: test#1

#103

Ima Risk

(Please enter signature in box above)

Wizard... Validate

Optional Reference

Optional Signature

9. Click on the Validate button.



10. Click on the [Send](#) button.
The next step in to transmit the data to the transaction server for credit card approval.



You can view the progress of the transmission here

11. At this stage, one of three things can happen:
- The Check gets approved.
 - The Check gets declined.
 - The transaction cannot be completed, because the server is undergoing maintenance or you are in a weak or non-wireless area.

Each of these situations is shown next.

Working with an Approved Check

Once a transaction is complete, Pocket CrossCheck will return an [Authorization Code](#).
The transaction is automatically stored as AP (approval) and can be accessed from the [Transaction Manager](#).

The [CrossCheck: Approval](#) screen also allows you to print a receipt. Pocket CrossCheck allows you to print to the Pocket Merchant.

If you do not want to print a receipt, click on the [OK](#) button and return back to the [Menu](#) screen.

X Pocket Cross Check

Date:	12/30/99 0:00
Name:	Ima Risk
Amount:	\$385.55
Auth Code:	639005
Reference:	test#1
Check No.	103
License No.	B9999999 - California
Signature	ON FILE - CLICK HERE -

Buttons: Delete, Print, OK

XCheck - 10000

X

California

LogOn please swipe card Exit

Pocket Merchant



X Pocket Cross Check

PRINT RECEIPT

Make sure your printer and click the icon below to start printing.

OK

send to printer

XCheck - 10000

Date: Nov 2, 2003
Time: 1:11:04 PM

NAME: Ima Risk
LIC: B9999999

CHECK: #103
AUTH: #639005
INVOICE: test#1

AMOUNT: \$385.55

THANK YOU !

In order to complete the process, even if you have printed a receipt, you must fill out the physical check in accordance with CrossCheck procedures. These are depicted below.

For Authorization, make sure ALL the information is on ALL Checks!

Name and Physical Address: Ima Risk, 123 Danger Drive, Sketchy, CA. 00000

Telephone Number: 714 555-1212

Store #: 12345

State of Issuance: CA

Customer ID Number: B9999999

Approval Number: 103

Check Details: PAY TO THE ORDER OF Your Company, \$ 386.55, Three Hundred and Eighty five Dollars and 55/100, CALIFORNIA DRIVER LICENSE, EXPIRES 10-19-06, B9999999, CLASS: C, IMA RISK, 123 DANGER DRIVE, SKETCHY, CA 00000, SEX: F, HAIR: BRN, WE: 110, EYES: BLU, DOB: 10-19-77, 06282001 999 X1 X3290

Using the Transaction Manager

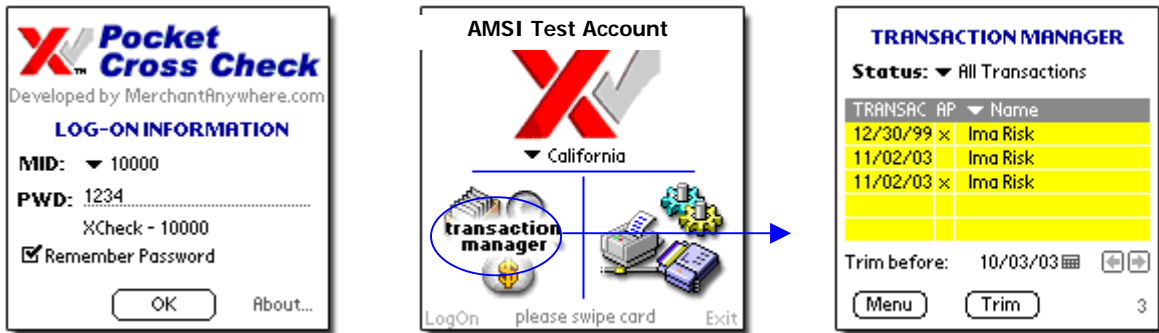
Introduction

The [Transaction Manager](#) screen is the area where you can view completed and pending transactions for the CrossCheck service. This section of the tutorial is designed to give you a basic over view of what the [Transaction Manager](#) can do. The data contained in the [Transaction Manager](#) will depend on what processes you have already performed. Thus, in most cases, the data presented here may not be identical to the data available on your PDA device (i.e., Transaction and Authorization IDs, dates, and approval types will differ).

Tutorial

To open the Transaction Manager...

1. Log on to your [Store Account](#) or a test account.
2. Click on [the Transaction Manager picture](#). This opens the [Transaction Manager](#) screen.



Overview of the Transaction Manager

TRANSACTION MANAGER
Status: ▼ All Transactions

TRANSAC	AP	Name
12/30/99	×	Ima Risk
11/02/03		Ima Risk
11/02/03	×	Ima Risk

Trim before: 10/03/03

Menu Trim 3

- Show **All**, **Pending**, or **Approved** Transactions.
- Drop down list to display different information.
- Date transaction occurred (sorted by oldest first).
- The "x" Indicates an approved transaction.
- Arrows to move next/previous if more than 5 transactions.
- Indicates total number of records. In this example, 3 records are **Credit Card Sales**. The remaining are **Account Transfers**.

Clicking on the **Trim** button will delete all records for current Type and Status before the **Trim Date**.
 Opens the calendar to select a **Trim Date**. The default **Trim Date** is 30 days before the current date.

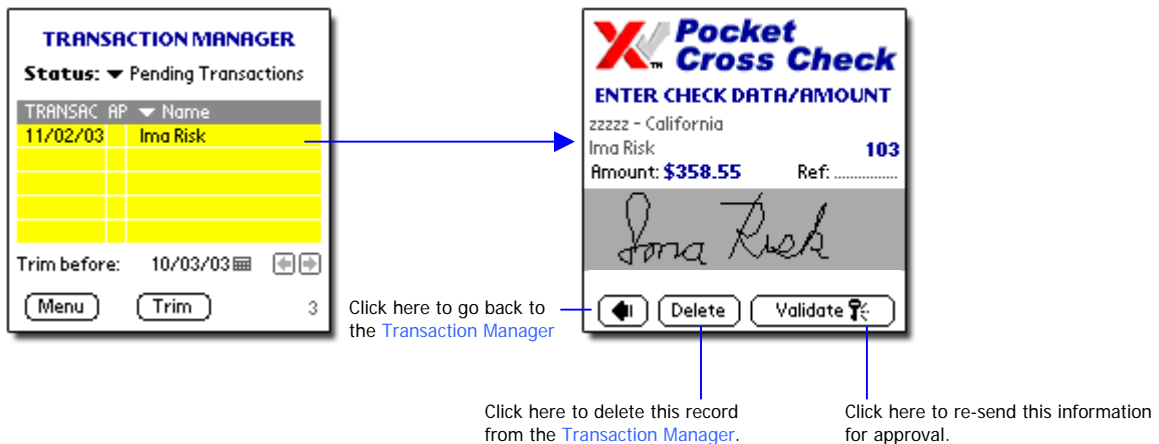
Working with Un-Approved Transactions from the Transaction Manager

Introduction

There may be times when you are unable to perform a wireless approval for a credit card or account transfer after taking all the information (See [Working with Transactions in a Weak/Non-Wireless Area](#) for details). In this case, you save the information to the [Transaction Manager](#) for processing at a later date. The tutorial below explains how to do this processing.

Tutorial

1. Open the [Transaction Manager](#).
2. Select Status: [Pending Transactions](#).
A list of all check guarantee transactions that have not yet been approved, are displayed.
3. Click on one from the list.
This example uses [Ima Risk](#).
This brings up the [Check Verification](#) screen. From this screen you can re-send the information and obtain an approval code, or you can delete the record if the order was cancelled. In addition, you can send the transaction information to the memo pad for storage on your Palm Desktop (using a Hotsync) or printing additional copies (if you have a printer such as Pocket Merchant installed on your PDA device).



Using Options

Setting up a Card Reader

Pocket CrossCheck allows you to attach a swipe terminal to your PDA Device through a direct cradle connection. IR Connections are not supported since valuable credit card track information requires a completely secure and enclosed environment. The default setting for this software is the Pocket Merchant 2-in-1 Card Reader and Printer. Follow the instructions that came with your card reader/printer on how to install the device to your PDA.

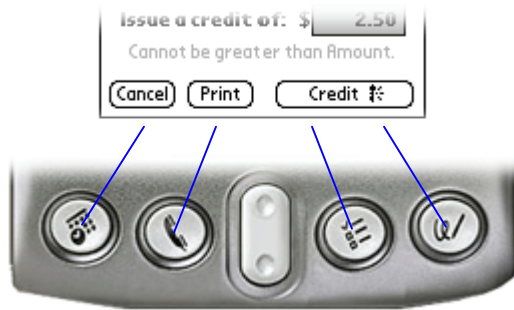


Setting up a Printer

Pocket CrossCheck was designed to work with the Pocket Merchant Series of Printers. Just plug your printer into the cradle port of your device, turn it on, and select print for your completed transactions. If you would like to save on receipt paper, then turn on Condensed Receipts. You will save about one inch of paper each time you print a receipt.

Use Hard Buttons

Pocket CrossCheck allows you to use the PDA's hard buttons as a substitute for the soft buttons located on the screen. Using this feature makes it easier to perform all your tasks without the need of a stylus.



In this example, the **Cancel** Soft Button can be activated by pressing the **Agenda** Hard Button. **Print** maps to the **Phone** button, and **Credit** maps to both the **Task** and **Note** buttons.

Deleting All Data for a Single Merchant Account

The [Option](#) screen also contains a button called: [Purge data?](#)

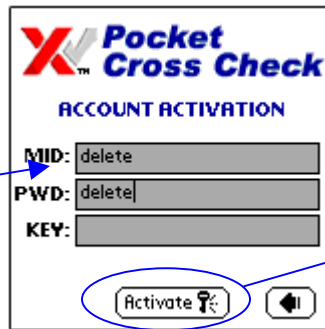
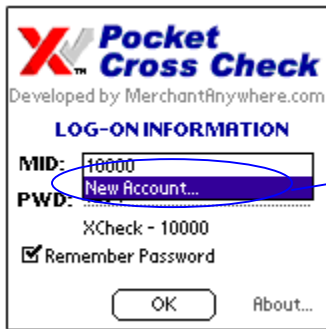
There may be times when you want to switch Store Accounts and delete all data from an existing account. To do this, click on the [Purge all data?](#) button. All the records stored in the [Transaction Manager](#) for the current account will be deleted.

Deleting All Merchant Accounts and Data

Rather than deleting data for a single account, you may want to remove all existing Merchant Accounts from Pocket CrossCheck, but still keep the software on the device. This is especially important if you are transferring the PDA device from one sales rep. to another (and they each use different Store Accounts). To access this feature, you must be in the [Account Activation](#) screen. To do this...

1. Click on the [Back](#) button and return to the Menu screen.
2. Click on the [LogOn](#) text in the lower left side of the screen.
3. Click on the [Merchant ID](#) list and select [New Account...](#)
4. In both the [MID](#) and the [PWD](#) text areas, enter [delete](#).
5. Click on the [Activate](#) button.

A message will display a warning and ask you to confirm your action. By clicking on the [Yes](#) button, all data will be deleted and Pocket CrossCheck will quit. The next time you open Pocket CrossCheck, you will be required to activate at least one account (see [Activating a Merchant Account](#) for detailed information).



Enter [delete](#) into both the [MID](#) and [PWD](#) text areas.

Then click on the [Activate](#) button.

