

Pocket Verifier™

Professional Edition

**Sony-Ericsson P800/P900 Smartphone
User Guide • Version 1**

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Pocket Verifier Professional Software Tutorial

(Sony-Ericsson P800/P900 Smartphone Edition)

Welcome

Welcome to Pocket Verifier Professional. 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 P800/P900 Smartphone.

Installing Pocket Verifier Professional

Please follow the instructions below to install Pocket Verifier Professional onto your P800/P900 Smartphone. In order to install Pocket Verifier Professional, you must have downloaded or obtained the software installation file [VerifierSE_x.xx.sis](#). (where [x.xx](#) is the version number) This Software also requires the AppForge Booster Runtime (booster.sis) before you can launch Pocket Verifier on your P800/P900 Smartphone. You can always get the most recent version from our WEB Site at:

<http://www.merchantanywhere.com/upgrades>

Note:

It is assumed that you have already installed the PC Suite Software that came with your P800/P900 Smartphone and that you have successfully established a connection between your Smartphone and the computer you are using to install this software. If not, please consult the documentation that came with your Smartphone and set up your system before continuing with this installation. Alternatively, if you have a memory stick duo reader attached to your computer, you can copy the installation (SIS) files to the Smartphone memory stick and install directly from your device. For on-line documentation on how to set up your Smartphone, please visit Sony Ericsson at: <http://www.sonyericsson.com>

Installation

In order to install Pocket Verifier Professional onto your device...

1. Place your Smartphone into its cradle and establish communications with your computer. If the PC Suite software is installed correctly, the connection should be established automatically.
2. Locate the [VerifierSE_x.xx.sis](#), where [x.xx](#) is the version number.
3. Double-click on this file.
The installation will start. Simply follow the directions located on the screen.
When the installation is complete, Pocket Verifier Professional will be successfully installed onto your Smartphone.

Installing Booster

Pocket Verifier Professional requires the Booster runtime to be installed on your Smartphone. If you do not have booster installed on your device please install it by following the above steps. Booster contains a number of components and may display a number of installation screens. Please visit the AppForge WEB Site (<http://www.appforge.com/booster>) or download the Smartphone booster file directly at:

<http://www.appforge.com/prod/eval/download/Booster.sis>

Launching Pocket Verifier Professional

After installation, Pocket Verifier Professional will be installed in the [Unfiled](#) category. When launching launch Pocket Verifier Professional for the first time, make sure your Smartphone is set to Phone Mode, as you will be required to make a wireless connection when activating your merchant account.

1. Choose the [Unfiled](#) category
2. Select [Pocket Verifier](#).
This will launch Pocket Verifier Professional and start the activation process.

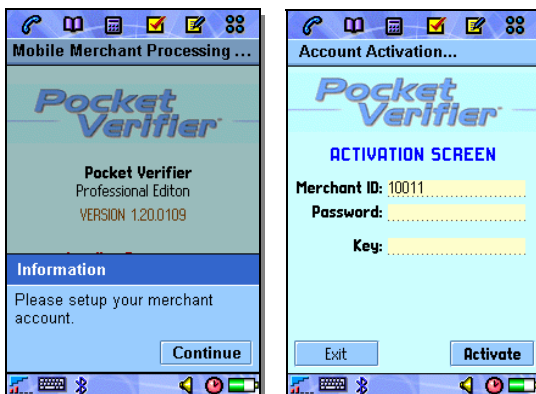


Activating a Merchant Account

Introduction

When you first launch Pocket Verifier Professional, you will be required to activate at least one merchant account. To do this, you must submit your Merchant Account paperwork in order to be issued a Merchant ID and password. In addition, activation requires an Activation Key. If you purchased the retail package, it is located on the inside flap of the Product Guide. If you purchased the product from our on-line store, then the Activation Key will be sent to you by E-Mail.

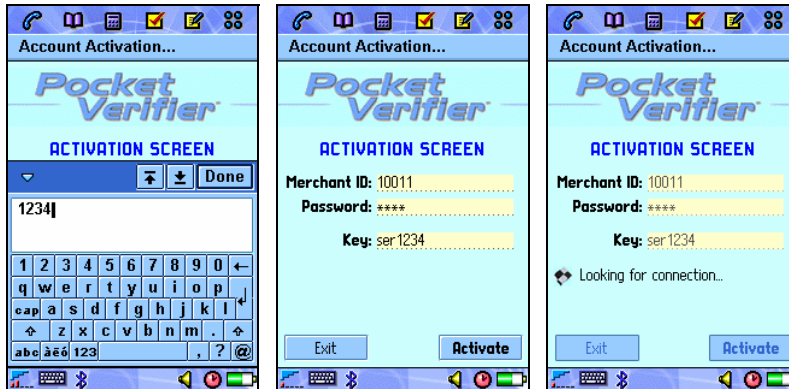
If you already sent in your merchant application and are waiting for your Merchant ID and password, you can still activate a test account. Please contact your representative to obtain a test account. A test account will allow you to try most of the features that Pocket Verifier Professional has to offer. It is recommended however, that if you can, use your own account with the examples in this tutorial, as you can always void or credit these transactions out either from you're the Smartphone software or from your on-line Transaction Manager. The card numbers and amounts used in this tutorial for credit card transactions are for testing purposes only. Depending on the type of account you are using, these test cards may or may not provide valid responses.



When you first run Pocket Verifier Professional, you will be asked to activate an account. Click the [Continue](#) button to show the [Activation Screen](#).

Tutorial

1. Enter your [Merchant ID](#), [Password](#), and [Serial Number](#).
You will receive this information with your approved merchant account. If you would like to use a test account, please contact your representative.
2. Click on the [Activate](#) button.
This will result in a communication 'hop' to the Account Activation Server. If your Smartphone is not set up properly, a message box will display the problem (i.e., connection not establish, device in Phone Mode, turn on?, batteries too weak for starting a wireless connection, etc.). If communications are successful, a message box will request a name verification of your merchant account.

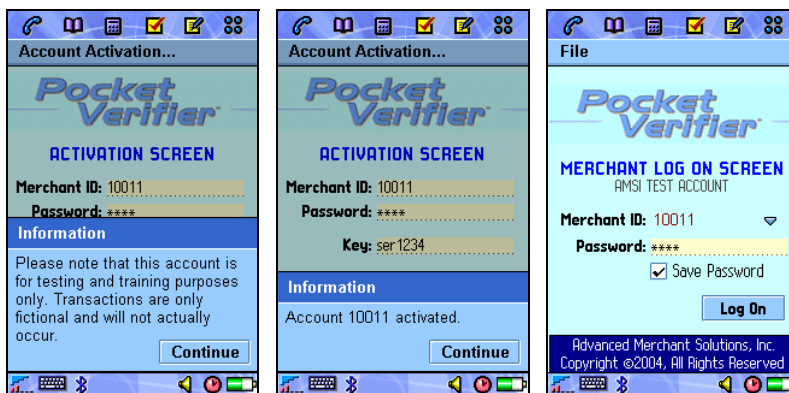


Note:

There are two methods of entering text into the text fields of Pocket Verifier.

The default method involves using the keyboard. To use P800/P900 handwriting recognition, turned off Auto Popup Keyboard from the Options screen.

3. Click on the [Continue](#) button for each message screen that appears.
Your account will then be activated. If you are using the test account, a message box appears indicating that any transactions processed will not actually occur. After clicking on the [Continue](#) button, the [Merchant Log-On Screen](#) appears. You will see this screen every time you start Pocket Verifier Professional.



Activating a Second Merchant Account

If you activated a test account, you can always activate another account at anytime from the [Merchant Log-On 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 Merchant Account

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

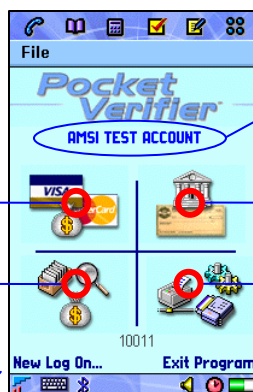
1. Click on the [Merchant ID](#) drop-down list box ...
If you have more than one Merchant Account activated on your PDA.
2. Select the account you want to use.
3. Enter your password.
After applying for your Merchant Account, you should have received a password with your Merchant ID. You should enter it here, or use a Test Account that you can obtain from your representative.
4. Click on the [Save Password](#) check box (optional).
Each time you log on to this merchant account, your password will be shown. The password check box is dependent on the Merchant ID (i.e., you can choose to remember a password for one Merchant ID and not another).
5. Click on the [Log On](#) button.
If it is the first you've used the software, you will be asked to enter your options. Detailed information about options can be found at the end of this user guide. Otherwise the [Menu](#) screen appears. Information related to this screen is shown below.

Menu Screen Functions

Click here to enter [Credit Card Sale Processing](#), where you perform all your credit card sales.

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.



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

Click here to enter [Account Transfers](#).

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.

Making your First Credit Card Sale

Introduction

In this tutorial you will take a Credit Card sale. You can follow step-by-step using the test account or your own Merchant Account, by adding the exact data that is presented here. The card number 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 credit card - even your own. The test account will not process any transactions. If you want to use a 'live' card on your 'live' account, you will be charged the respective card's (i.e., Visa, MC, Discover, etc.) transaction rate. If you do not wish to be charged this fixed transaction rate, please use the test account. The test account will also allow you to perform Voids and Credits. The tutorial below will use a fictitious Visa card belonging to **Nadine Visa**.

Tutorial

1. Log on to [your merchant account](#) or to a test account.

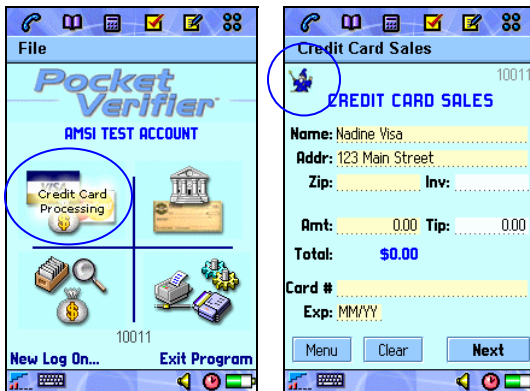
2. Click on the [Credit Card Processing](#) picture.
This opens the [Credit Card Sale](#) screen.

3. Enter the [Name](#) and [Address](#).

Pocket Verifier Professional uses AVS (Address Verification System) when you manually enter credit cards. The address must be the billing address for the card being used. However, to speed up writing information, only the numeric portion of the address can be used for validation. A complete address is beneficial for your records, however.

Name: **Nadine Visa**
Address: **123 Main Street** (123 is also acceptable)

4. Click on the [Wizard](#) icon.



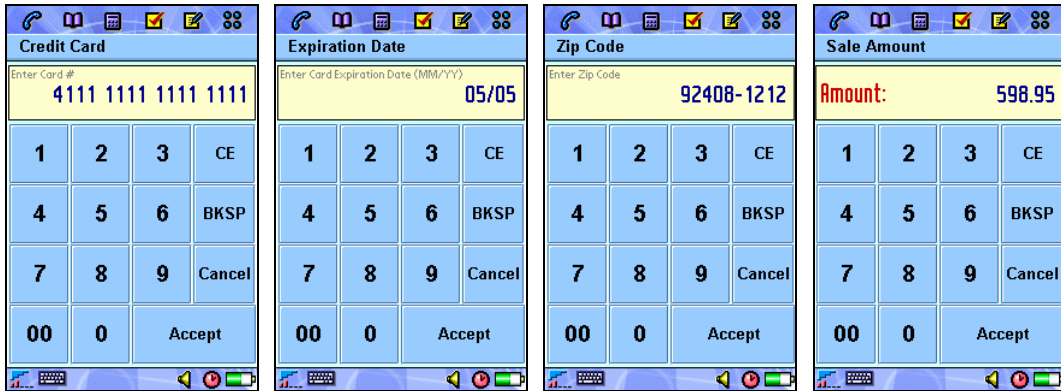
5. Follow the steps in the Wizard and enter the following information.

Card #: **4111 1111 1111 1111**
Expiry: **05/05**
Zip Code: **92408-1212** (the first 5 digits are also acceptable: 92408)
Amount: **\$598.95**

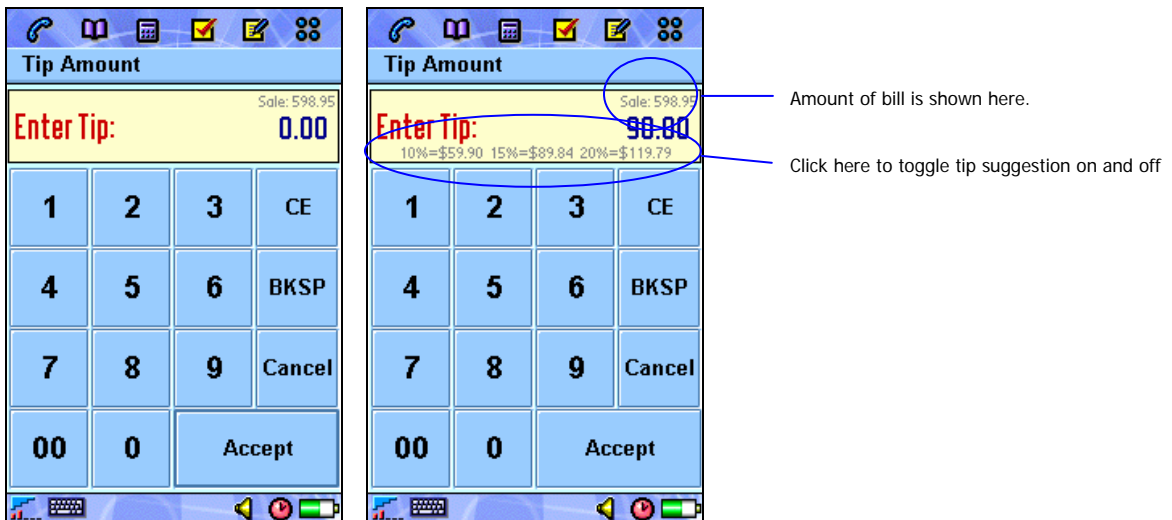
The wizard takes you through various steps of entering data needed for a credit card transaction by displaying a keypad. By clicking the [Accept](#) button, Pocket Verifier Professional performs some quick validation routines on your data. It also detects the type of credit card being used and formats it accordingly.

While the Wizard helps in entering data in a logical manner, you can also bring up the keypad by clicking on the respective field entry. Below is the process for entering data when using the Wizard. Under options you can also specify [Prompt for Tip](#) to display the Tip Keypad when entering amounts. By clicking on the lower portion of the yellow display area tip suggestion can be shown or hidden. In addition, if you did not enter a name in step 3 above, the software will prompt you for it.

When using the Pocket Spectrum Bluetooth Card Reader and Printer to swipe a credit card, the Amount Keypad will first appear (more information about swiped transactions can be found under: [Credit Card Sales with Pocket Merchant and a Physical Credit Card](#)).



6. Enter the Invoice ([Inv.](#)) Number.
Entering the invoice is optional. If the invoice field is left blank, then a default reference number will be added. In the example below [12-9281](#) is entered.
7. If the Tip keypad did not appear (i.e., [Prompt for Tip](#) is unchecked in Options), you can enter it here by clicking on the [Tip Field](#). If you are in the service industry, you may request to have a tip added to the amount. This is optional. Click on the Tip field and hand it to the client (The amount is shown in the caption). If a Tip is not added, it will not be shown on the verification screen or on the printed receipt. In the example below, a [\\$90.00](#) tip is added for an amount of [\\$598.95](#).



At this point all the data for a keyed transaction is entered and you can go to the next step.



Note:

When using Pocket Merchant or another Magnetic Card Reader attachment, only the amount of the sale need be entered. AVS is not required and swiped rates are lower than keyed entry.

For information on how to use Pocket Merchant for entering credit card data, see: [Credit Card Sales with Pocket Merchant and a Physical Credit Card](#)

This icon indicates a valid Visa card number.

- Click on the **Next...** button.

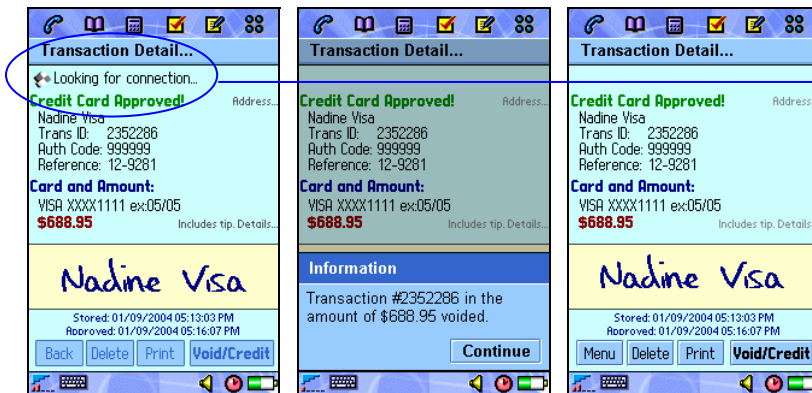
The **Sales Verification** screen is displayed. Here you have the option to request a signature before sending the information to the transaction server for authorizing payment. It is a good idea to give the customer your device at this time so they can verify that the billing address, card number, amount, and tip (if any) are correct. You can also change the tip by clicking on the Tip label.

Tip: Locking the Screen:

To ensure that the customer doesn't exit the **Sales Verification** screen when you pass the Smartphone over for a signature, you can also lock the screen. This is performed by clicking on the Lock Screen icon (🔒). This will disable the screen buttons and display a Red Lock Screen icon (🔒). To unlock the screen after the customer returns the PDA, simply click on the Lock Screen icon a second time. The buttons will re-enable and you can send the transaction to the server for processing. Locking the screen will still allow the customer to clear the signature by clicking on the **Clear Signature** label.

- Click on the **Charge...** button.

Once the information is verified and the customer signs, the next step is to transmit the data to the transaction server for credit card approval. This is done by clicking on the **Charge...** button.



After clicking on the **Charge...** button, communications will start.

At this stage, one of three things can happen:

- The credit card gets approved.
- The credit card 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 explained next.

Working with an Approved Credit Card

Once a transaction is complete, Pocket Verifier Professional will return an [Authorization Code](#) and [Transaction ID](#). Both of these numbers are numerical. In the case of a test account, the [Authorization Code](#) may contain letters (i.e., [VITAL6](#)) or [999999](#) (as in the current example).

The transaction is automatically stored as an approval and can be accessed from the [Transaction Manager](#) for processing Voids or Credits. The [Credit Card Approved](#) screen also provides you with the ability to print a receipt if you are using the Pocket Spectrum Printer. Print Setup is available from the [Options](#) screen and requires Bluetooth bonding of your P800/P900 Smartphone to the Spectrum Printer (see the section [Setting Up Pocket Spectrum - Bluetooth Pairing](#) under [Options](#) for details). Otherwise, click on the [New Sale](#) button and return back to the [Menu](#) screen. In some cases, you will also be permitted to delete the order from the internal database.

Working with a Declined Credit Card

If the card is declined, a message will display the reason. There are many reasons why a card can get declined. Yet, for whatever reason, Pocket Verifier Professional allows you to return to the previous [Credit Card Sale](#) screen for entering a new card or different information. If for some reason, you want to keep a declined transaction, you can always click on the [Save](#) button from the [Sales Verification](#) screen. This is especially useful if the decline was due to an invalid password. You can save your transaction, go back to the [Log-On Information](#) screen and enter the correct password. Then go to the [Transaction Manger](#), select the un-processed transaction, and re-submit. See [Using the Transaction Manager](#) for details.

Important Note:

[Declined Cards](#) are not automatically saved like [Approved Transactions](#). You must click on the [Store](#) button before exiting Pocket Verifier Professional. Otherwise, you will loose this information. For security reasons, Pocket Verifier Professional does not save any information in memory once another program takes control.

Working with Transactions in a Weak/Non-Wireless Area

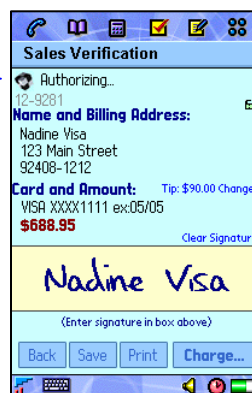
There may be times when you are unable to perform a wireless approval for a credit card. Some possible situations are:

- The location you are in may have weak coverage causing a long time for processing to occur.
- The location has no coverage at all or your wireless service may be temporarily unavailable.
- The battery may be 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 may be down for routine maintenance.

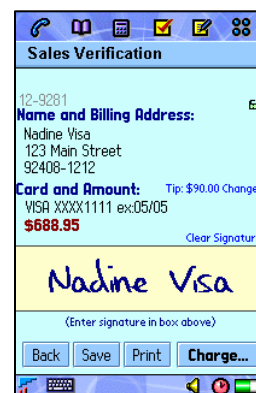
For whatever reason, Pocket Verifier Professional allows you to stop an existing connection and to store sale information in the [Transaction Manager](#) for processing and validating at a later time. To do this, click on the [Rotating Box](#) to stop the connection and try again. If you cannot get validation from the servers, try at a later time by clicking on the [Store](#) button to store the information in the [Transaction Manager](#).

Click on the [Rotating Box](#) to stop the current connection.

See [Using the Transaction Manager](#) on how to resubmit unapproved sales transactions.



Connecting to Server



Stopped Connection

Credit Card Sales with Pocket Merchant and a Physical Credit Card

Introduction

In the previous example, you made your first sale by entering the customer's credit card and billing information. While the P800/P900 Smartphone allows you to enter text using handwriting recognition or an on-screen keyboard, there is still room for making mistakes entering an address, person's name or card number. This, compounded with working in the field, can be a daunting task. However, Pocket Verifier Professional was designed to take credit cards 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.

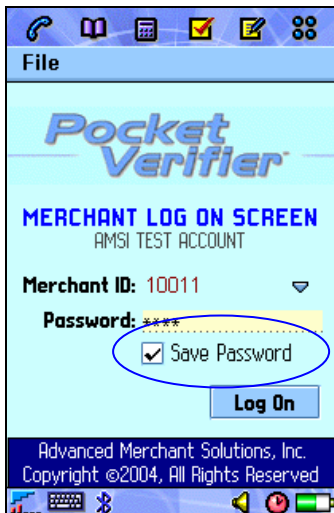
Setting Up Your Smartphone for Quick Sales

A. Automatically Launch Pocket Verifier Professional

There are a number of ways to launch Pocket Verifier Professional. One method is to add Pocket Verifier Professional to [Flipped Closed Shortcuts](#) in the [Device's](#) tab of the [Control Panel](#) or choosing [Preferences](#) under the [View](#) menu.

B. Bypass the Log-On Password

Pocket Verifier Professional allows you to save your password for each Merchant 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.



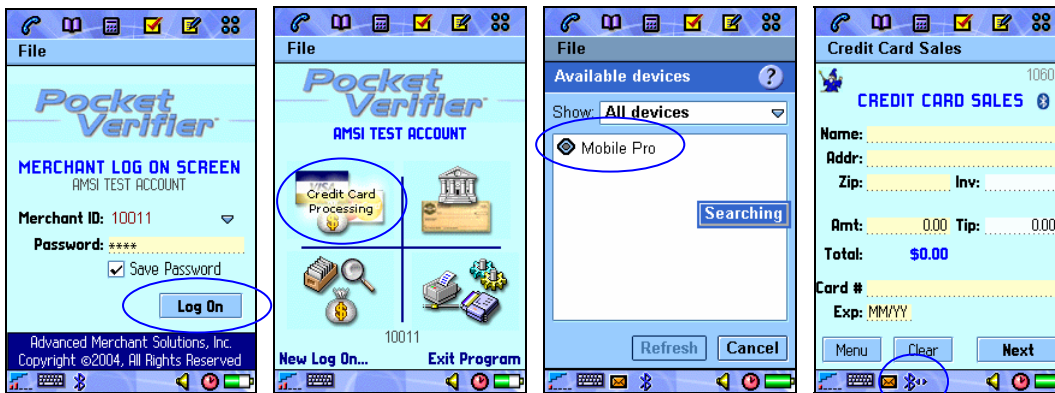
C. Use the Bluetooth Pocket Spectrum

Pocket Spectrum is a small compact 2 in 1 Printer and Card Reader. With Pocket Spectrum all the necessary information can be extracted from a credit card. Performing credit card transactions with an actual credit card and obtaining signatures will also provide you with lower transactions rates from your Merchant Account provider! Before using Pocket Spectrum, you will need to pair it with your P800/P900 Smartphone. You will also need to select Pocket Spectrum in the Options screen. See the section [Setting Up Pocket Spectrum - Bluetooth Pairing](#) under [Options](#) for details).

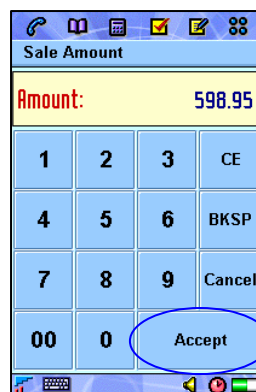
Performing Quick Credit Card Sales

After following the [Setting Up Your Smartphone for 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. After launching Pocket Verifier Professional, click the **OK** button. Since the **Remember Password** box is checked, the current Merchant Account password (i.e., account 10011) is already present. All you need to do is click on the **OK** button.
2. Click on the **Credit Card Processing** picture. This will go to the Credit Card Sales screen. If Pocket Spectrum was selected in the **Options**, then the **Bluetooth Manager** will appear.
3. Turn on the Pocket Spectrum. **Mobile Pro** will appear in the Bluetooth Manager as a bounded device.
4. Select **Mobile Pro** from the **Bluetooth Manager**. Once negotiation is complete, the Bluetooth icon will appear in on the bottom taskbar with two arrows.



5. Swipe the Credit Card through the Pocket Spectrum credit card reader (magnetic strip facing the unit). 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 Smartphone and the amount number pad appears.
6. Enter any amount, click **Accept**, and follow steps 8 and 9 above. If the Prompt for Tip option is checked on in Options, then the Tip number pad will also appear. After entering the amount(s), all data needed to process the current sale is entered, and the screen indicates a Swiped transaction next to the Credit Card icon. Entering an invoice is optional and need not be performed for quick sales. The name of the card holder, card number, and expiration date appears on the **Credit Card Sale** screen. In addition, **Address** displays **CARD PRESENT** and **Zip Code** displays **99999**. Any modifications to this screen (with the exception of the **Amount** and **Invoice** fields) will automatically cancel swiped data.



Quick Notes:

- Entering an invoice is optional.
- Entering a Tip is also optional

Making an Account Transfer Sale

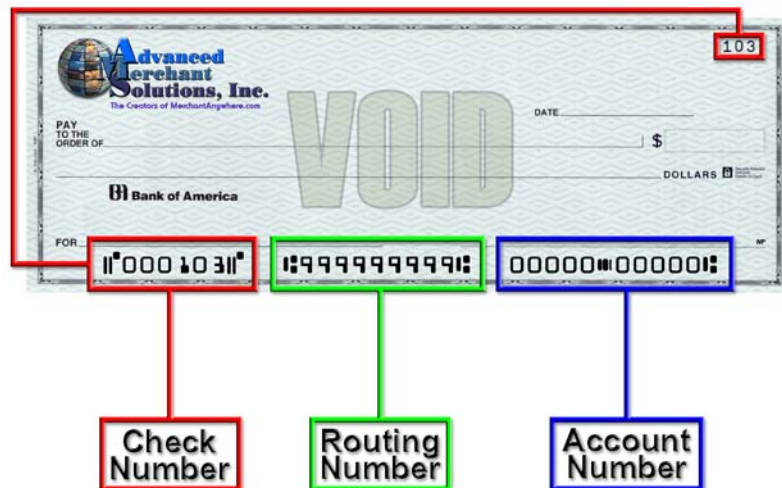
Introduction

This option is primarily so your business can accept checks by telephone, fax machine, or e-mail. If your customer can physically hand you a check, **YOU ARE BETTER OFF ACCEPTING IT, AND PHYSICALLY DEPOSITING IT IN YOUR BANK.**

The bad check protection statutes and laws generally apply only to physical checks, with pen-and-ink signature. In addition, the customer can challenge and reverse the electronic check up to sixty days after it is issued. The electronic check acceptance feature is a convenience for the reputable vendor to accept non-physical checks from honest customers. To date, it does not offer all of the safeguards that physical checks and credit card transactions do.

Please familiarize yourself with the procedures for entering a credit card. The procedures for an electronic check are nearly identical except that instead of entering a credit card account number and an expiration date, you enter the numbers on the bottom of the check.

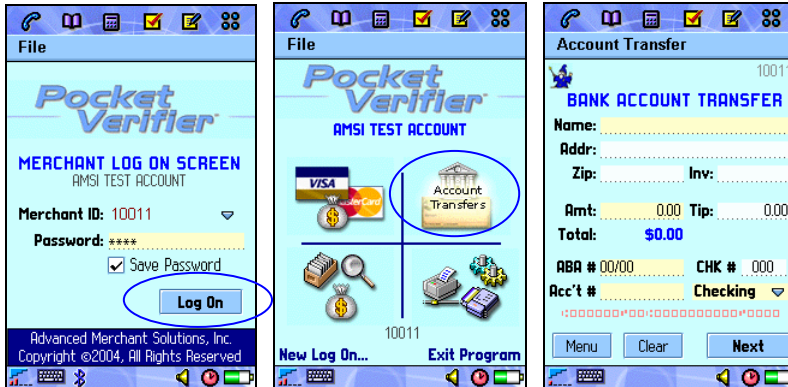
There are three groups of numbers on the check. One is the check number, the other is the ABA/Routing or bank transit number, and another is the Account number. This is shown in the diagram below.



Please note that the relative positions may vary from check to check, but the check number on the bottom always matches the number in the upper right hand corner. Additionally, the routing number can always be found between two **⌚** marks. If you attach the optional accessory **Check Reader Plus™**, you can simply pass a check through the reader and have the routing number and account number appear on the **Bank Account Transfer** screen. Visit <http://www.merchantanywhere.com> for information on this accessory and others. This tutorial will use a fictitious savings account. Thus, we recommend that you use the **MerchantAnywhere Test Account (10011)**. You can, of course, use your own account and do an actual transfer.

Tutorial

1. Log on to your [Merchant Account](#) or a test account.
2. Click on the [Account Transfers](#) picture.
This opens the [Bank Account Transfer](#) screen.



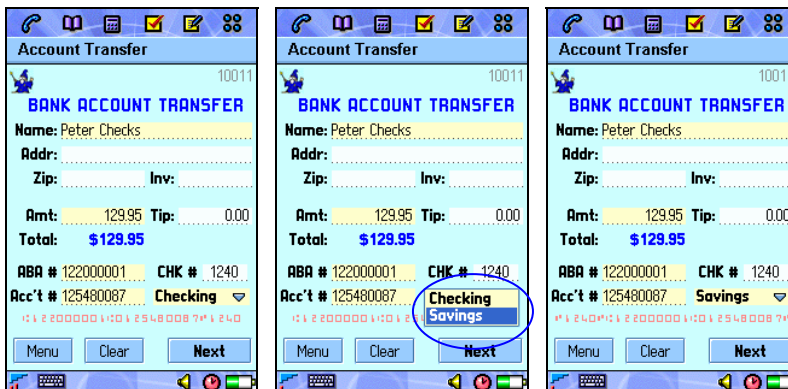
3. Enter the following information:

Name: **Peter Checks**
AMT \$: **129.95**
ABA #: **12200001**
Acc't #: **125480087** (this is the bank account number)

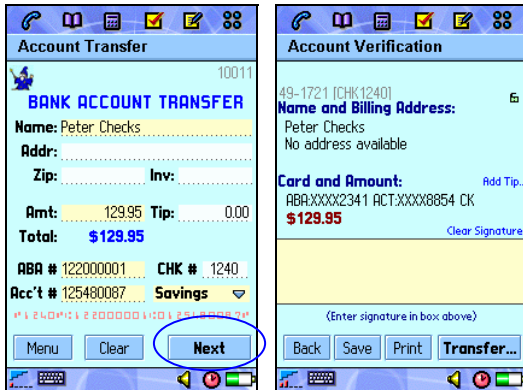
When you enter the ABA, Account, or Check number, the information which should closely match the format on a check (MICR Data) is also displayed. You can also use the Wizard to enter all numeric information.

4. Next, choose [Savings](#).

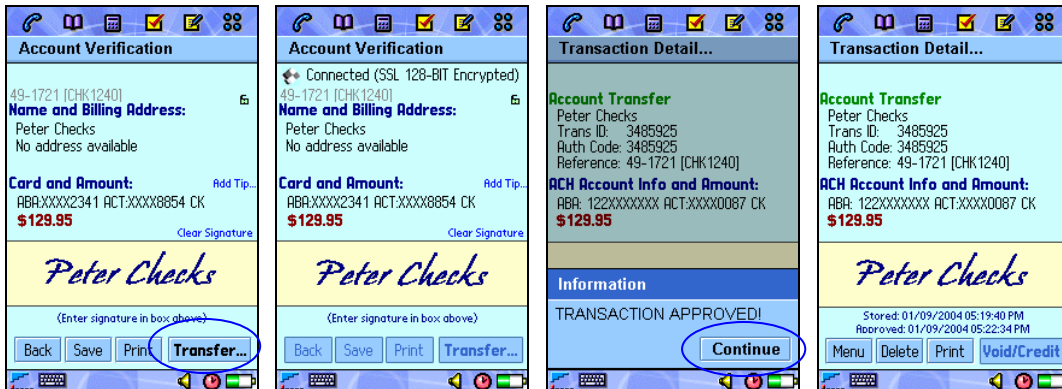
The default is checking, but you can choose checking or savings. Most of the time, your customers will be writing checks from their checking accounts... but, occasionally, one of your customers may want to give you the information for a savings account.



- Click on the **Next...** button.
The **Account Verification** screen is displayed and is nearly identical to the one that is displayed for Credit Card sales. The same functionality is provided (i.e., signature capture, locking the screen, and changing the tip).



- Click on the **Transfer...** button.
Once the information is verified and the customer signs, the next step is to transmit the data to the transaction server, which in turn, initiates an **Account Transfer Request**. Remember, the electronic check acceptance feature is a convenience for a reputable vendor to accept non-physical checks from honest customers. To date, there is no electronic verification system available that can offer all the safeguards that are provided by physical checks, check guarantee, or credit card transactions.



At this stage, the account transfer can either be approved or declined. In addition, if the server is undergoing maintenance or you are in an a weak or non-wireless area, the request cannot be completed. For approved transfers you can click on the **Print** button then issue a printed receipt. For a declined event, such as Non-Sufficient Funds in an account, it is recommended that you request another form of payment. The same is true in a weak or non-wireless location. Credit Cards and physical checks are the best forms of payment. While Pocket Verifier Professional allows you to store Account Transfer data for transmitting at a later time, credit card sales are much more reliable.

Using the Transaction Manager

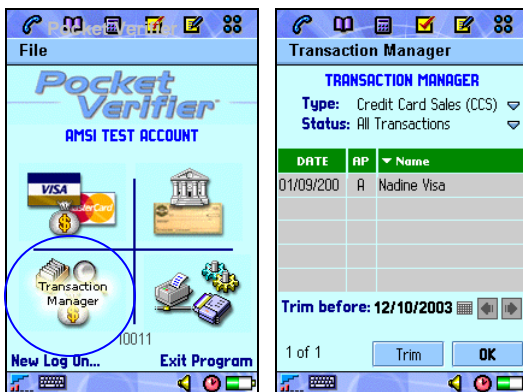
Introduction

The [Transaction Manager](#) screen is the area where you can view completed and pending transactions for Credit Cards and Bank Account Transfers. It is also the entry point for allowing voids and credits of completed credit card transactions. 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 P800/P900 Smartphone (i.e., Transaction and Authorization IDs, dates, and approval types will differ).

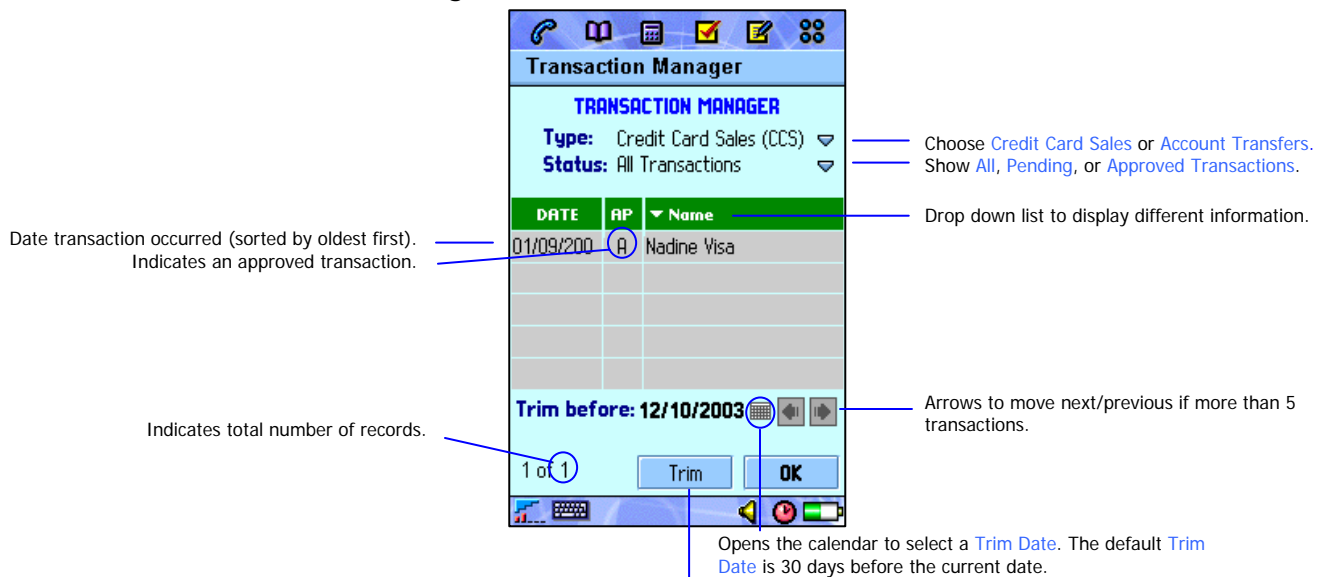
Tutorial

To open the Transaction Manager...

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



Overview of the Transaction Manager



Clicking on the [Trim](#) button will delete all records for current Type and Status before the [Trim Date](#).

Issuing a Void or Credit from the Transaction Manager

Introduction

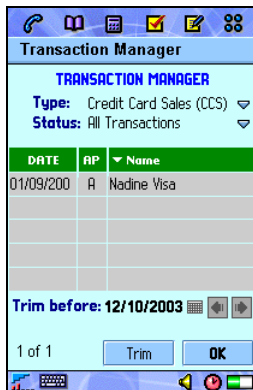
After a Credit Card transaction is completed, the transaction server submits the record for end-of-day closeout (batch processing). If a closeout has not yet been performed, Pocket Verifier Professional allows you to void a transaction. Issuing a void or a credit depends solely on whether a closeout has occurred. The tutorial below gives an example of issuing a void (in most cases, you can issue a void immediately after you received an [Approved Credit Card](#) transaction).

If, however, a transaction is already closed out (i.e., the batch has been sent to the bank for processing at the end of the day), then a void cannot be issued. In such cases, it is necessary to do a credit. Pocket Verifier allows you to do full or partial credits.

Tutorial

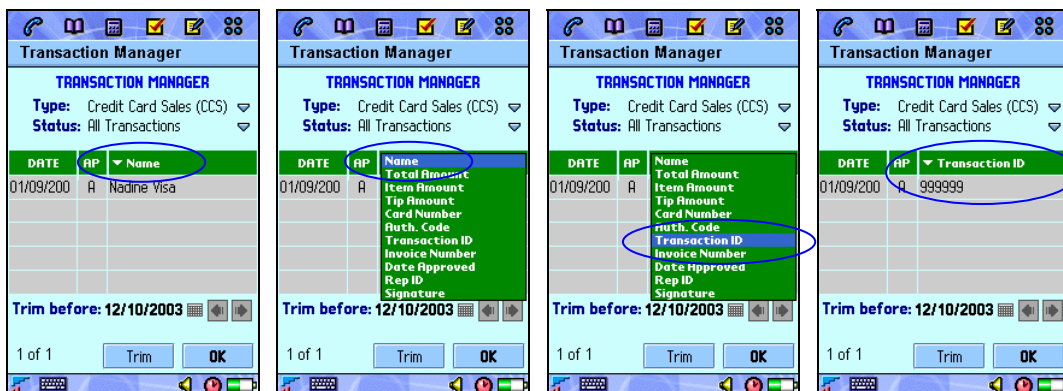
1. Open the [Transaction Manager](#).
2. Select [Type: Credit Card Sales](#).

The list will only display Credit Card transactions that were approved. In the example below, there is one transaction.

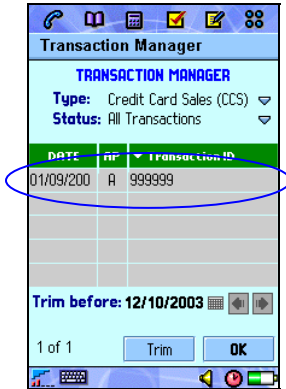


3. Click on the [Name](#) list.

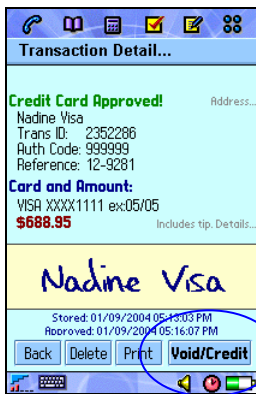
The list contains a number of selections on how to display data in the [Transaction Manager](#).



- Click on the [first item](#) in the list.
This opens up the [Credit Card: Approved](#) screen with additional information.



- Click on the [Void/Credit...](#) button.
Pocket Verifier Professional sends a request to the transaction server and determines if the batch was closed out.



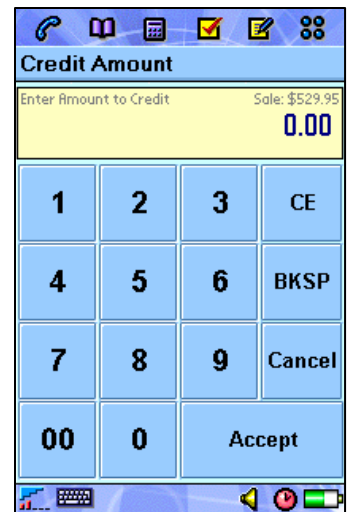
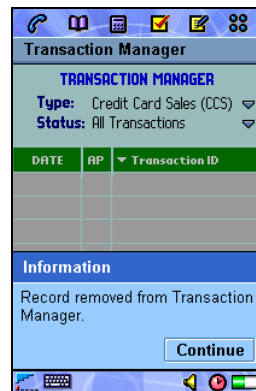
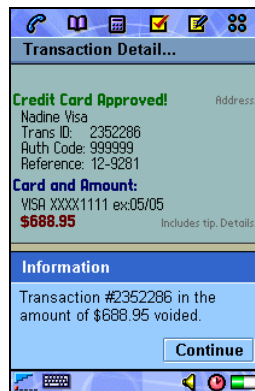
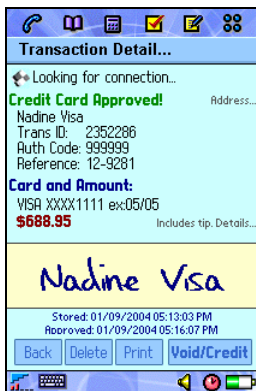
Is the batched Closed?

NO

YES

Automatically issues a void and the transaction is removed from the Transaction Manager.

You can choose to issue a Credit. Amount Keypad appears, allowing you to issue a full or partial credit. Upon success, the transaction is removed from the Transaction Manager.



Note:
The total amount to credit cannot exceed the total amount of the sale (in this example, \$529.95).

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 [Type: Credit Card Sales](#).
Select [Type: Account Transfers](#) if you want to display the Account Transfers list.
3. Select Status: [All Transactions](#).
If you select a Pending Transaction, a list of all credit card transactions that have not yet been approved, will be displayed.
4. Click on one from the list.
This brings up the [Credit Sales](#) or [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. You can also select the [Print](#) button and print additional copies (if you have a printer such as Pocket Merchant attached to your PDA device).

Click here to go back to the [Transaction Manager](#). If changes were made, you will be prompted to save them.

Click here to delete this record from the [Transaction Manager](#).

— You can change the tip by clicking here.

— Clear the signature by clicking here.

— Click the [Charge](#) or [Transfer](#) button to re-send this information for approval.

Note:

In some cases, you may want to store information (i.e., food item sale), then return to the transaction and ask for a signature and/or tip before processing. The verification screen allows you to perform both these actions.

Using Options

Introduction

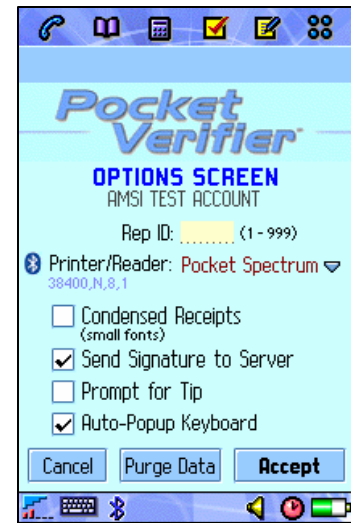
Pocket Verifier Professional also has a number of other exciting features not normally found in traditional POS terminals. These are Rep ID classification and Server-Side Signature Storage. In addition, the options screen allows you to setup your Smartphone to use the Pocket Spectrum Bluetooth printer.

Assigning a Rep ID:

A Representative Identification Number (Rep ID) is ideal for companies that have multiple agents in the field, but use only one Merchant Account. By assigning a Rep ID to each of your "Reps", you can monitor sales performance, setup tip calculations, and create individualized sales reports.

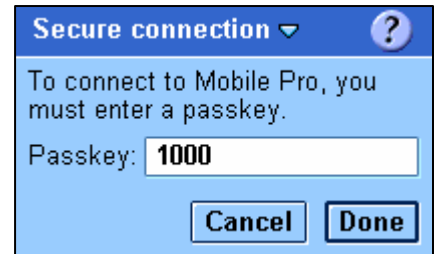
Setting up Pocket Spectrum – Bluetooth Pairing:

Pocket Verifier Professional for the P800/P900 Smartphone was designed to work with the Pocket Spectrum Bluetooth printer. Before using the printer, however, you must Pair the Printer to your Smartphone. Please see the section [Connecting to other devices/via Bluetooth Wireless technology](#) for details on how to bond your P800/P900 Smartphone to the Pocket Spectrum.



The Pocket Spectrum device is automatically set to [Discoverable](#) when you turn it on.

The Device Name is: **Mobile Pro**
The Passkey is: **1000**



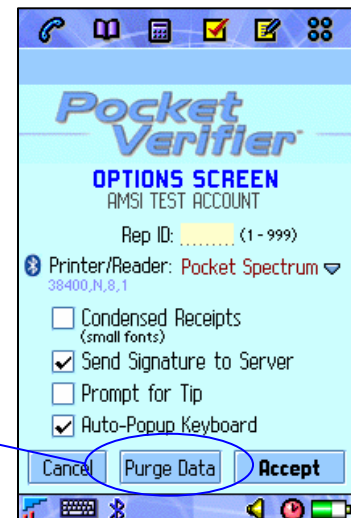
Server-Side Signature Storage

There may be times when you want to store the client's signature on the server. when the signature is stored on the server, you can retrieve it through the WEB-Based Transaction Manager (i.e., Transaction Central). The default setting for this feature is set to ON. It is recommended that Signatures be sent only in areas where wireless connectivity is optimal (three bars or more), as signature data can contain up to 2000 bytes.

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 Merchant Accounts and delete all data from an existing account. To do this, click on the [Purge Data](#) button. All the records stored in the [Transaction Manager](#) for the current account will be deleted.

Click here to delete all transaction records for the current Merchant Account.



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 Verifier Professional, 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 Merchant Accounts). To access this feature, you must be in the [Account Activation](#) screen. To do this...

1. Click on the [OK](#) 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 [Merchant ID](#) and the [Password](#) 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 Verifier Professional will quit. The next time you open Pocket Verifier Professional, you will be required to activate at least one account (see [Activating a Merchant Account](#) for detailed information).

