

# **Pocket Verifier™**

## **Professional Edition**

**Release Version 7 for Pocket PC  
User Guide**

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### GENERAL

This software is NOT FOR EXPORT.

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# Pocket Verifier Professional Software Tutorial

## (Pocket PC Edition)

### Welcome

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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 PDA.

### Installing Pocket Verifier Professional

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Please follow the instructions below to install Pocket Verifier Professional onto your Pocket PC. In order to install Pocket Verifier Professional, you must have downloaded or obtained the software installation file [PVP.PPC.INSTALL.X.XX.EXE](#) (where X.XX is the version number).

#### Note:

It is assumed that you have already installed the Pocket PC Active Sync software that came with your Pocket PC and that you have successfully performed a User or Guess Connection between your Pocket PC and the computer you are using to install this software. If not, please consult the documentation that came with your Pocket PC device and set up your system before continuing with this installation. For on-line documentation on how to set up your Pocket PC, please visit the following page:  
<http://www.microsoft.com/windowsmobile/pocketpc/ppc/default.mspx>

### Installation

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

1. Place your Pocket PC into its cradle and establish communications with your computer.  
If you are using a computer other than your own, you do not need to create a partnership; logging in as a guess is sufficient for installing the software.
2. Locate the [PVP.PPC.INSTALL.X.XX.EXE](#) file.
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 Pocket PC and registered with the system.

## Launching Pocket Verifier Professional

After installation, Pocket Verifier Professional will be installed in the Programs Directory. To launch Pocket Verifier Professional for the first time,

1. Click on the [Start Menu](#).
2. Select [Programs](#).
3. In the [Programs Directory](#), select [Pocket Verifier](#).  
This will launch Pocket Verifier Professional and start the activation process.

You may also want to all a shortcut to your Menu bar.

See your Pocket PC documentation on how to do this, or visit the Pocket PC web site at:

<http://www.microsoft.com/MOBILE/developer/technicalarticles/shortcuts1.asp>



Pocket Verifier

## Activating a Merchant Account

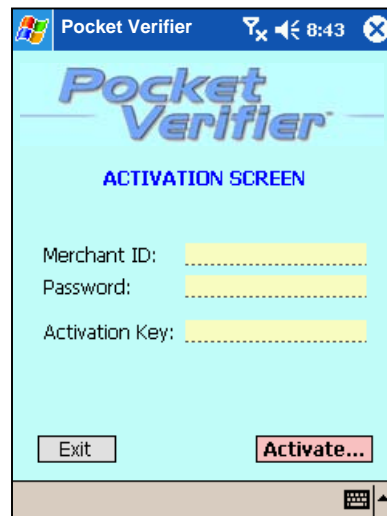
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### Introduction

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 a serial number that is located on the inside flap of the Product Guide (Account Activation).

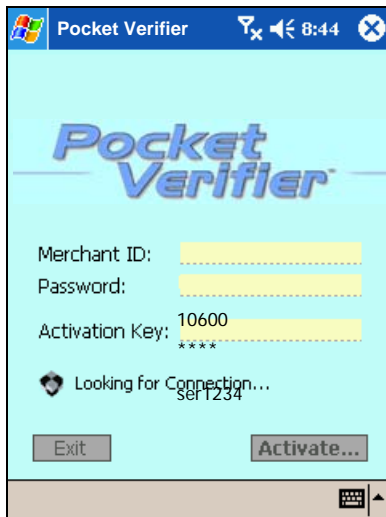
If you already sent in your application and are waiting for your Merchant ID and password, you can still activate a test account. Please contact your representative to obtain a test account. A test account will allow you to try most of the features that Pocket Verifier Professional has to offer. It is 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 the your Pocket PC 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 [OK](#) button to show the [Account 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 PDA device is not set up properly, a message box will display the problem (i.e., connection not establish, serial port already in use, batteries too weak for starting a wireless connection, IR port not open on your cell phone, etc.).



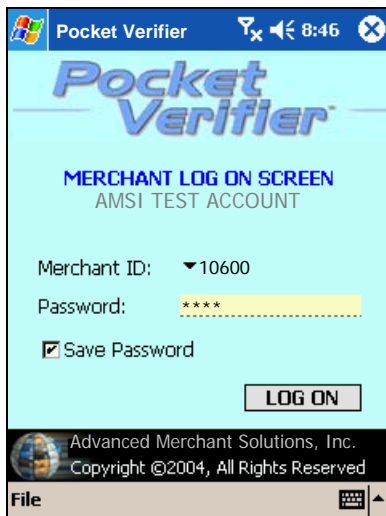
**Note:**

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

It is also important that you have setup your Pocket PC correctly so that it can automatically connect to the Internet. If you have not yet setup your connection or need help in setting the correct parameters, please visit:

<http://www.microsoft.com/mobile/pocketpc/software/connected.asp>

3. 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. After clicking on the [OK](#) button, you will then be brought to the [Log-On Information](#) screen. You will see this screen every time you start Pocket Verifier Professional.



**Note:**

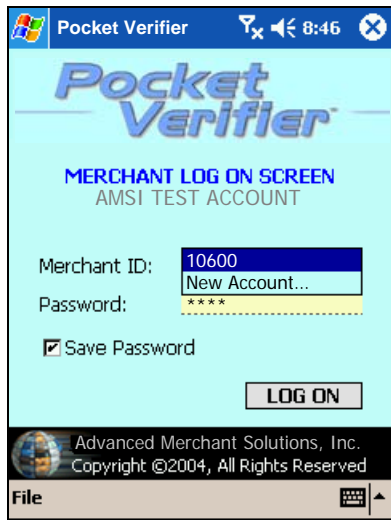
If it is the first time you are using the software, you will be asked to setup your options. For more information about options see the [Using Options](#) section at the end of this document.

## Activating a Second Merchant Account

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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 Merchant Account

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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 [Remember 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).

- Click on the **OK** button.  
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 Pocket Verifier application window. The title bar reads "Pocket Verifier" and the system tray shows the time as 8:47. The main screen displays "AMSI TEST ACCOUNT" at the top. Below this are four icons: a credit card (VISA/MasterCard), a bank building, a magnifying glass over a document, and a printer. At the bottom, there are buttons for "New Log On...", "10600", and "Exit Program". A "File" menu is visible at the very bottom.

Click here to enter **Credit Card Sale Processing**, where you perform all your credit card sales.

Click here to enter **Account Transfers**.

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.

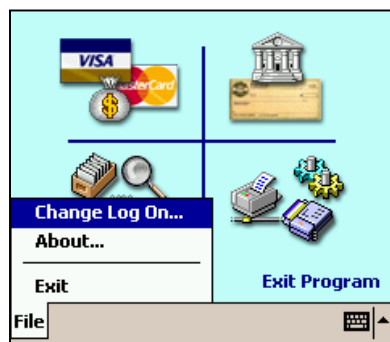
Click here to change your **Options** or to remove all data stored in the Transaction Manager for the current Merchant Account.

Click here to go back to the **Log-On Information** screen and change to another Merchant Account.

Click here to **log-off from the current Merchant Account** and to exit the software.

Displays the Merchant ID.

Additional information can be found under the File menu.



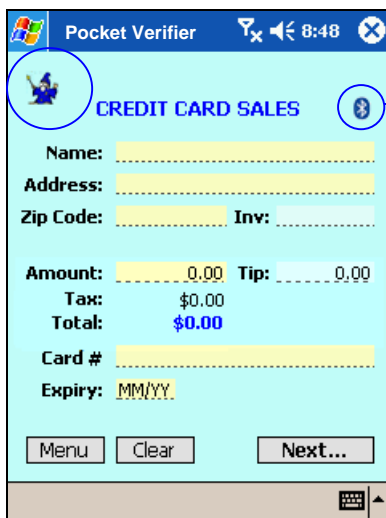
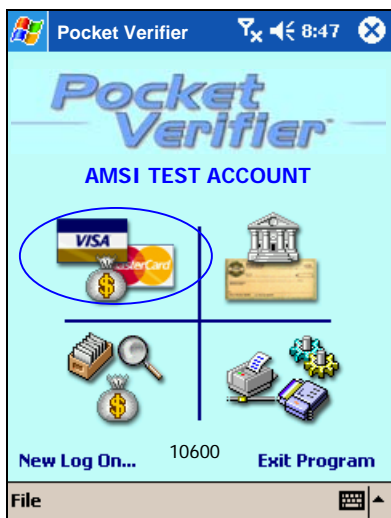
## Making your First Credit Card Sale

### 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 **Pete Peterson**. Adding tax to the sale is not covered.

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



If the Pocket Spectrum Bluetooth printer is selected, then the Bluetooth reset icon will appear on pages can access the reader and printer functions.

Clicking on this icon, will reset the Bluetooth communications with the Pocket Spectrum, should the Spectrum auto-time out.

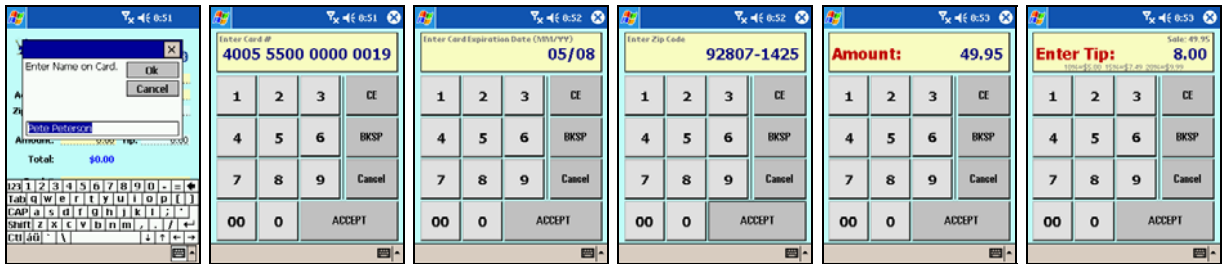
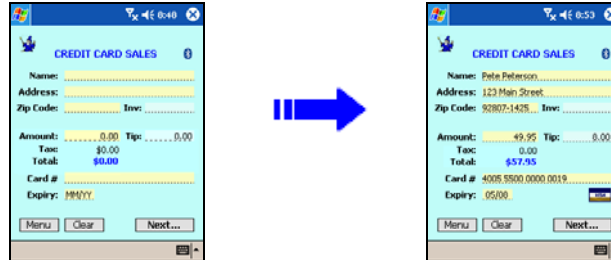
4. Following the steps in the Wizard and enter the following information.

Name: **Pete Peterson**  
Card #: **4005 5500 0000 0019**  
Expiry: **05/08**  
Zip Code: **92807-1425** (the first 5 digits are also acceptable: 92807)  
Amount: **\$49.95**  
Tip: **\$8.00**

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.

When using Pocket Merchant or PDA Swipe to swipe a credit card, only the Amount Keypad will be shown (more information about swiped transaction can be found under: [Credit Card Sales with Pocket Merchant and a Physical Credit Card](#)).



5. Enter an 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. In this example 123 Main Street was used.

You can also enter an Invoice Number (INV), however, entering the invoice is optional. If the invoice field is left blank, then a timestamp will automatically fill in this area **PVP CE** will be added as a default value. In the example below **AMS001** is entered.

When entering a tip, you can display a tip suggestion box by clicking anywhere on the amount area. In addition, you can bypass the Tip prompt from the options screen.



6. Click on the [Next...](#) button.

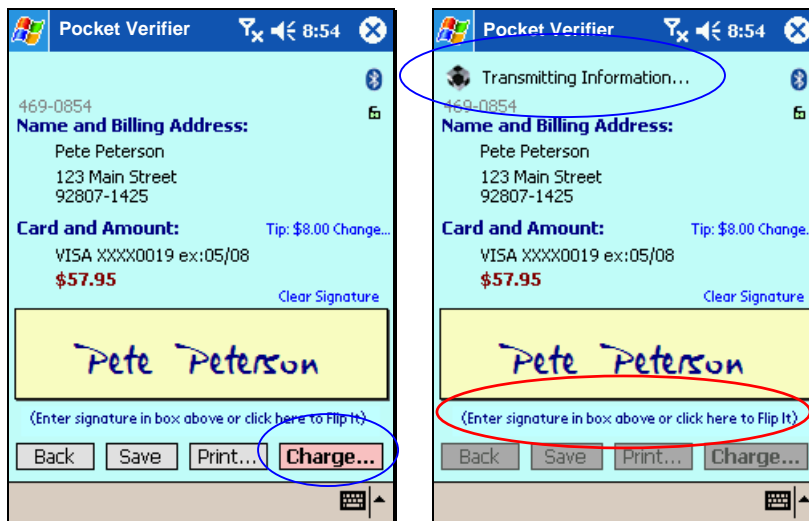
The [Credit Card Verification](#) screen is displayed. Here you have the option to request a signature before sending the information to the transaction server for authorizing payment. It is a good idea to give the customer your device at this time so they can verify that the billing address, card number, amount, and tip (if any) are correct. The customer (or you) can also enter/change the tip on this screen. The signature can also be changed.

**Tip: Locking the Screen:**

To ensure that the customer doesn't exit the [Credit Card Verification](#) screen when you pass the device 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.

7. 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.



After clicking on the [Charge...](#) button, communication will start.

Buttons that need to establish a communications link with the Internet are color-coded differently from all other buttons. If the screen is locked, this button will appear grey. Make sure you unlock the screen before trying to process a transaction.

**NEW FEATURE:** Tap on the [Enter signature...](#) text and the screen will flip upside down. This enables you to keep a grip on the phone while the customer signs (like UPS, and Airborne).

At this stage, one of three things can happen:

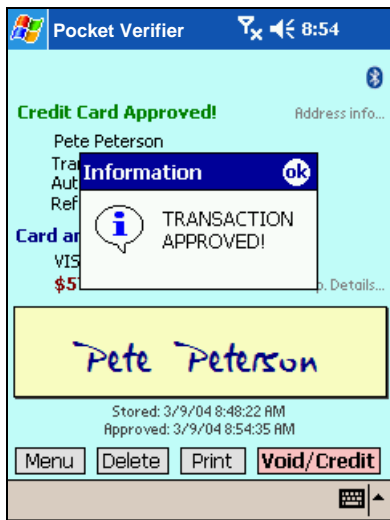
- The credit card gets approved.
- The credit card gets declined.
- The transaction cannot be completed, because the server is undergoing maintenance or you are in a weak or non-wireless area.

Each of these situations is shown 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 also contain letters (i.e., [VITAL6](#)).

The transaction is automatically stored as an approval and can be accessed from the [Transaction Manager](#) for processing Voids or Credits. The [Credit Card: Approval](#) screen also provides you with the ability to print a receipt if you are using a Pocket Printer such as the Pocket Merchant or Pocket Spectrum. Print Setup is available from the [Options](#) screen. Otherwise, click on the [Menu](#) button and return back to the [Menu](#) screen. You can also delete or Void/Credit the approved action from this screen. This is the same screen that appears when selecting an approved transaction from the Transaction Manager. See [Using the Transaction Manager](#) for more details.



## 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. This is especially useful if the decline was due to an invalid password. You can save your transaction, go back to the [Log-On](#) screen and enter the correct password. You would then go to the Transaction Manager and select the un-processed transaction and re-submit it to the server. See [Using the Transaction Manager](#) on how to resubmit unapproved sales transactions.

### Important Note:

[Declined Cards](#) are not automatically saved like [Approved Transactions](#). You must click on the [Save](#) button before exiting Pocket Verifier Professional. Otherwise, you will lose 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.
- The batteries on the PDA device 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.
- Your wireless service may be temporarily unavailable due to routine maintenance.

For whatever reason, Pocket Verifier Professional 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, 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.

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

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### Introduction

In the previous example, you made your first sale by entering the customer's credit card and billing information. While the Pocket PC allow you the ability 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 make 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.

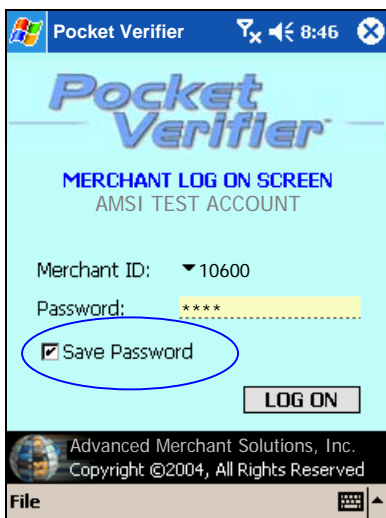
### Setting Up Your PDA for Quick Sales

#### A. Automatically Launch Pocket Verifier Professional

There are a number of ways to launch Pocket Verifier Professional. Visit <http://microsoft.handango.com>. There you can enter the Keyword LAUNCHER into the search box and find the best tool for your Pocket PC. Some are freeware; while others are shareware which require a small purchase fee.

#### 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.



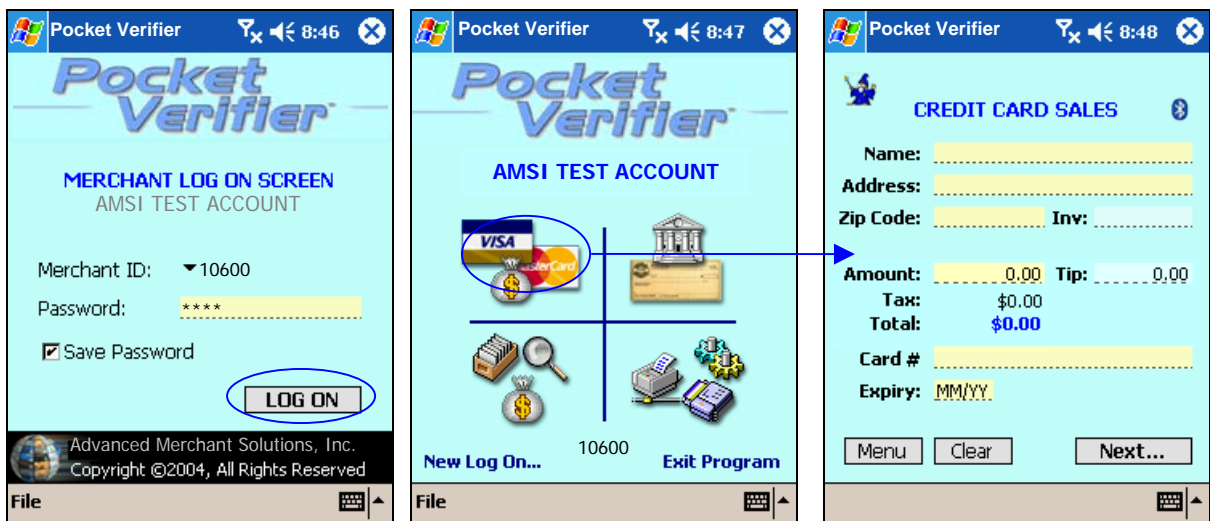
#### C. Attach Pocket Merchant

Pocket Merchant is a small compact 2 in 1 Printer and Card Reader. If you have our Bluetooth Pocket Spectrum, then no cables are necessary. With a Pocket series printer and reader, 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! Some settings on your Pocket PC may need to be changed in order to use the Pocket Merchant and Spectrum printers. See [Using Options](#) for more details.

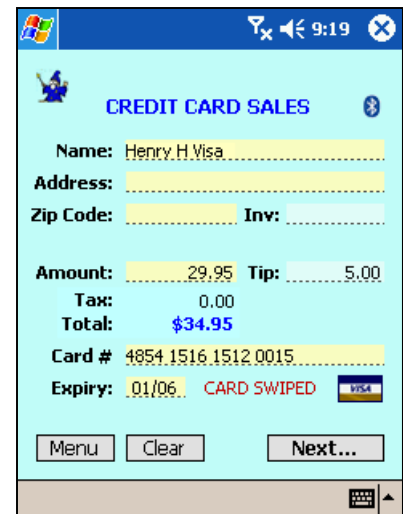
## Performing Quick Credit Card Sales

After following the [Setting Up Your PDA 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.

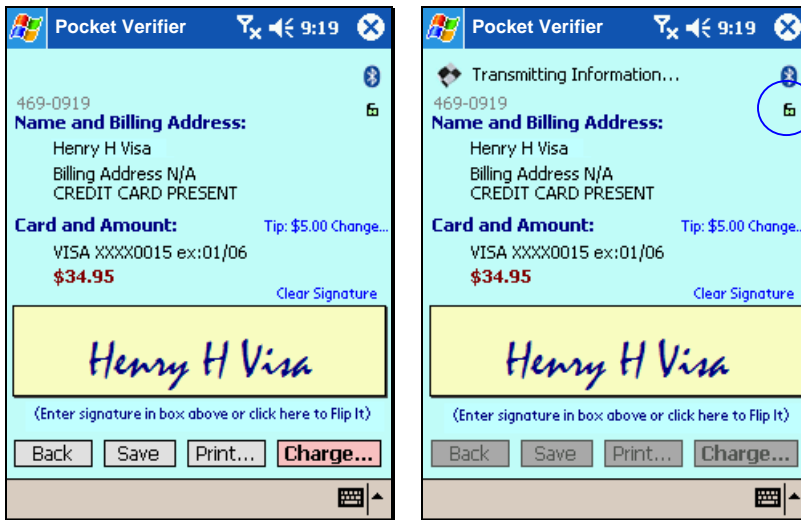
1. After launching Pocket Verifier Professional, click the **OK** button.  
Since the [Remember Password](#) box is checked, the current Merchant Account password (i.e., account 10600) is already present. All you need to do is click on the **OK** button.
2. Turn on your Pocket Merchant or Pocket Spectrum Printer.  
If you are using the Bluetooth Printer, the reader is initialized when you enter into the Sales screen. If your reader auto-shuts off, you can always turn it on again and click on the Bluetooth icon on the screen. This will reinitialize the Bluetooth connection for reading credit cards. Alternatively, you can return to the main menu, turn on your reader, and re-enter the sales screen.
3. Click on the [Credit Card Processing](#) picture.



4. Swipe the Credit Card through the Pocket Merchant 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 PDA device and the number pad appears.
5. Enter any amount and click on the **ACCEPT** button.  
All data needed to process the current sale is now entered and focus is brought to the **Invoice** text area. Entering an invoice is optional and need not be performed for quick sales. Entering a **Tip** is also optional. At this point, the name of the card holder, card number, and expiration date appears on the **Credit Card Sale** screen. In addition, **CARD SWIPED** will appear next to the card's expiration date. Any modifications to the amount, card information and name, will automatically cancel card-swiped data.



6. Click on the [Next...](#) button.
7. Ask the customer to verify the information and to sign in the [Signature](#) box.
8. Click on the [Send...](#) button.  
Once the credit card is approved, you are ready for another sale, or you can print a receipt and have it signed (see [Working with an Approved Credit Card](#) for details).



Click on the [Lock Screen](#) icon to lock (🔒) the buttons before handing the PDA to the customer to sign.

Click on the [Lock Screen](#) icon a second time to unlock (🔓) the buttons before sending the transaction to the server.

## Making an Account Transfer Sale

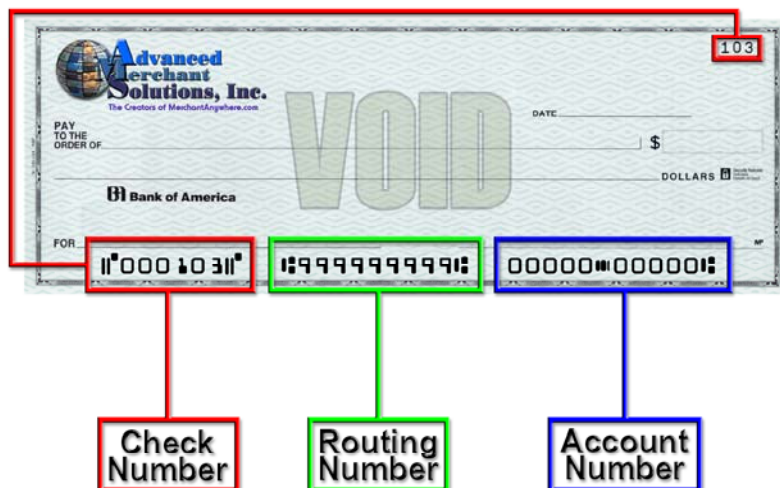
### Introduction

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.

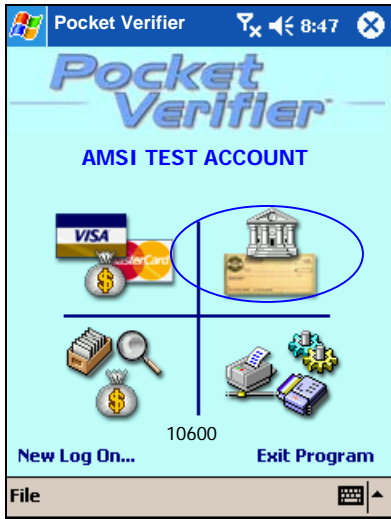
There are three groups of numbers on the check. One is the check number, the other is the ABA or bank routing number (also known as the transit number), and another is the Account number. This is shown in the diagram below.



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. This tutorial will use a fictitious savings account.

## 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.

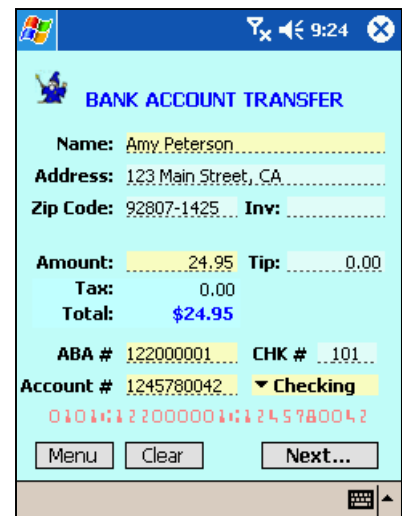


3. Enter the following information:

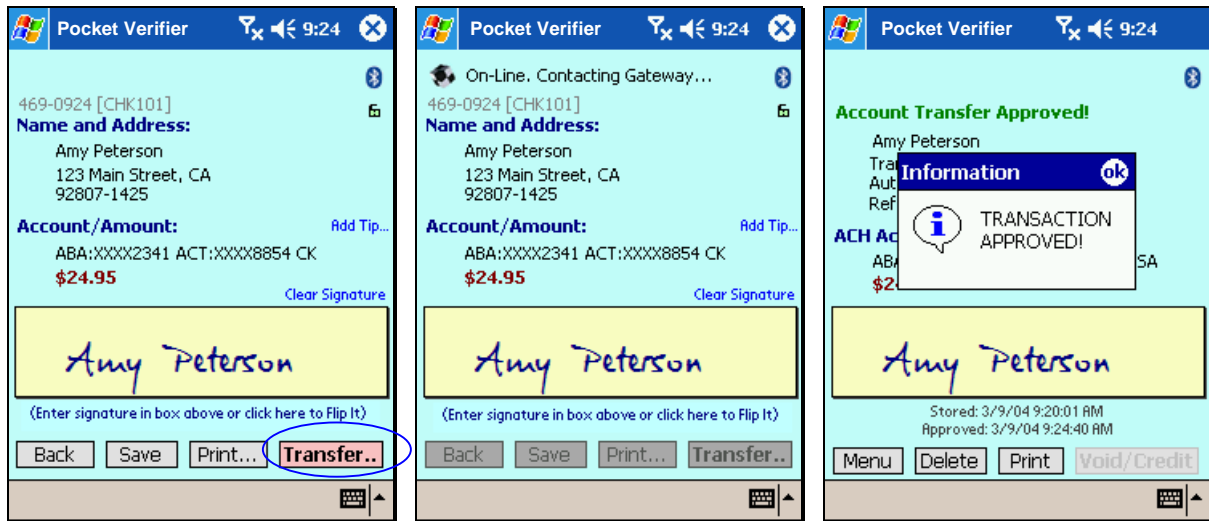
Name:	<b>Amy Peterson</b>	name on account
Address:	<b>A123 Main Street, CA</b>	optional (for data mining)
Zip:	<b>928071425</b>	optional (for data mining)
Zip:	<b>928071425</b>	optional (for data mining)
Routing:	<b>122000001</b>	
Account:	<b>1245780042</b>	
Amount:	<b>24.95</b>	
Check:	<b>101</b>	optional (for data mining)

4. Choose [Checking](#) from the list next to the Account #.  
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.

As you enter the ABA (routing), account, and check numbers, the MICR display will be updated. This can be used as an aid for entering information from a check. By clicking on the MICR display, you can switch between two different formats.



5. Click on the [Next...](#) button.  
The [Bank Account Transfer Verification](#) screen is displayed. Here you can request a signature before sending the information to the transaction server for requesting payment. It is a good idea to give the customer your PDA device at this time, so that they can verify that the account information and amount are correct. They also add a signature (optional).
6. 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 and 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 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

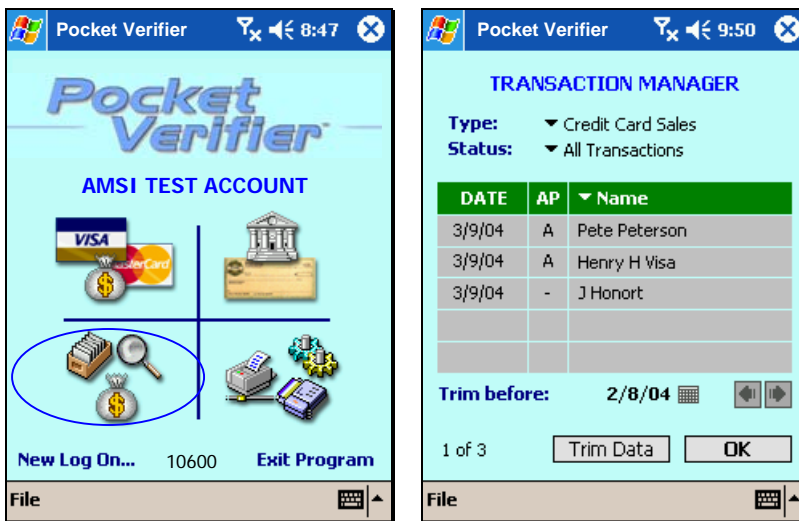
### Introduction

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



#### Overview of the Transaction Manager

The screenshot shows the 'TRANSACTION MANAGER' screen with callout lines pointing to various UI elements:

- Type:** Credit Card Sales (Choose Credit Card Sales or Account Transfers.)
- Status:** All Transactions (Show All, Pending, or Approved Transactions.)
- DATE**, **AP**, **Name** (Drop down list to display different information.)
- DATE** (Date transaction occurred (sorted by oldest first). Indicates an approved transaction.)
- AP** (Indicates total number of records. In this example, 3 records are Credit Card Sales. The remaining are Account Transfers.)
- Trim before:** 2/8/04 (Arrows to move next/previous if more than 5 transactions.)
- 1 of 3** (Indicates total number of records. In this example, 3 records are Credit Card Sales. The remaining are Account Transfers.)
- Trim Data** (Clicking on the Trim button will delete all records for current Type and Status before the Trim Date.)
- OK** (Opens the calendar to select a Trim Date. The default Trim Date is 30 days before the current date.)

# Issuing a Void from the Transaction Manager

## Introduction

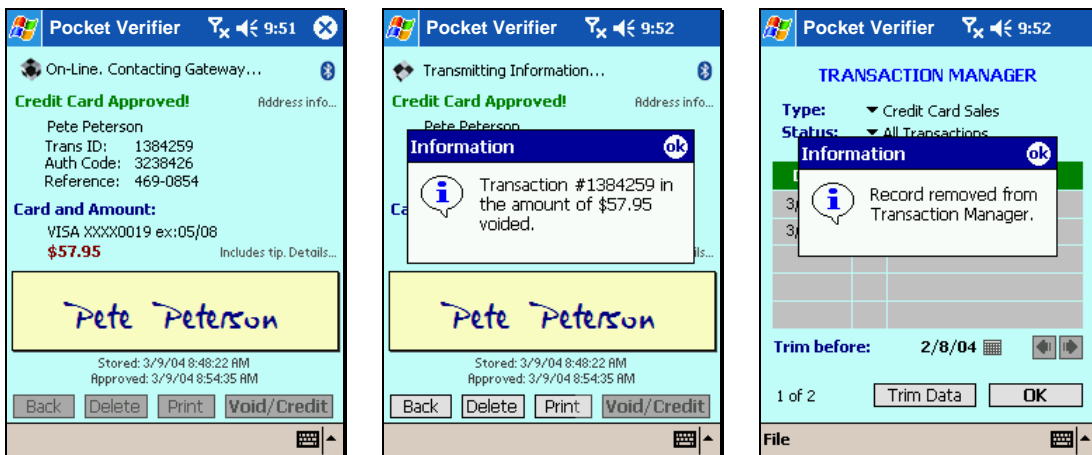
After a Credit Card transaction is completed, the transaction server submits the record for end-of-day closeout (batch processing). If a closeout has not yet been performed, Pocket Verifier Professional allows you to void a transaction. Issuing a void or a credit depends solely on whether a closeout 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).

## Tutorial

1. Open the [Transaction Manager](#).
2. Select [Type: Credit Card Sales](#). If not already selected, then click on the [Name](#) list. The list will only display Credit Card transactions that were approved. If the selected criteria do not list any results, but there are transaction, REC HIDDEN will appear where the record number appears. The list contains a number of selections on how to display data in the [Transaction Manager](#).
3. Click on the [first item](#) in the list. This opens up the [Credit Card: Approved](#) screen with additional information.



4. Click on the [Void/Credit...](#) button. Pocket Verifier Professional sends a request to the transaction server and determines if the batch was closed out. If the batch was not closed out, a void will be issued and the item is removed from the Transaction Manager. Otherwise you have the choice of performing a partial or full credit.



## Issuing a Credit from the Transaction Manager

### Introduction

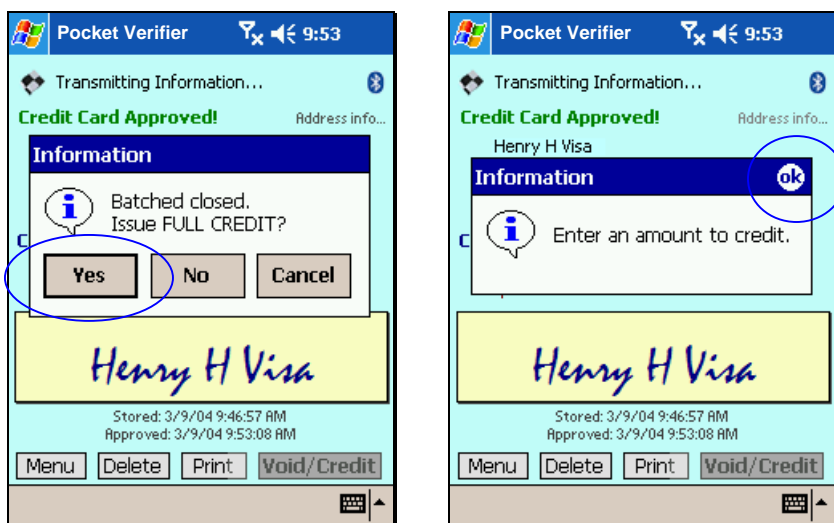
If a transaction is already closed out (i.e., the batch has been sent to the bank for processing at the end of the day), then a void cannot be issued. In such cases, it is necessary to do a credit. Pocket Verifier Professional allows you to do full or partial credits. The tutorial below shows you how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

### Tutorial

1. Select **Yes** to issue a partial credit.
2. When the Keypad appears, enter a value for the Credit not exceeding the sale amount displayed and click on the **ACCEPT** button.

The request is sent to the server.

Once approved, a message appears indicating that the credit was successful.



Pocket Verifier Professional will then delete this transaction from its records and return you to the [Transaction Manager](#).

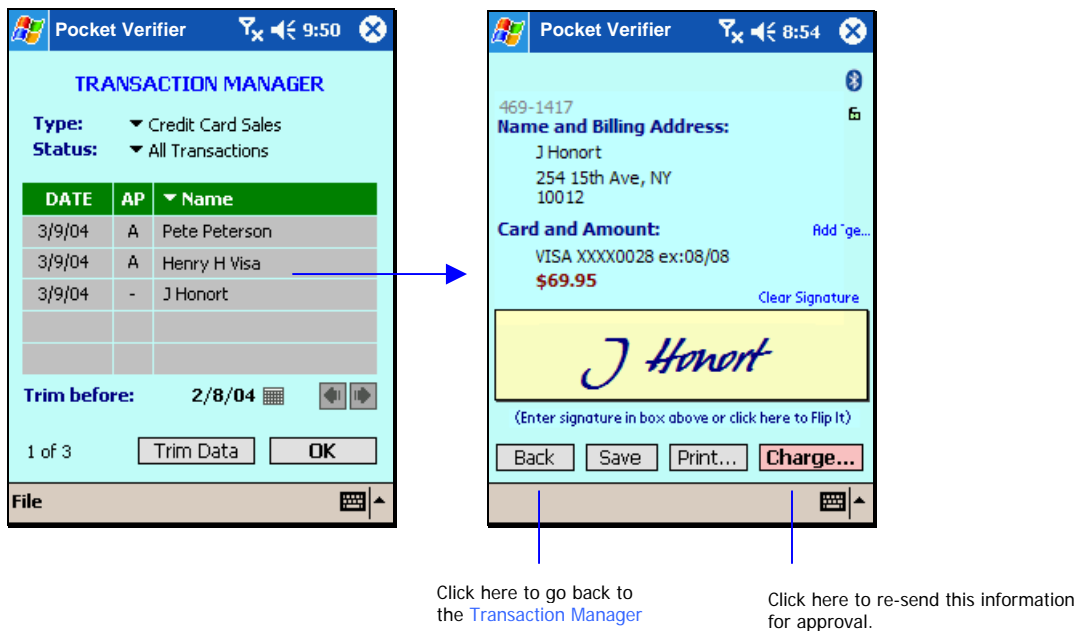
## Working with Un-Approved Transactions from the Transaction Manager

### 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 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 example uses [J Honort](#).  
This brings up the [Credit Card 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 device).



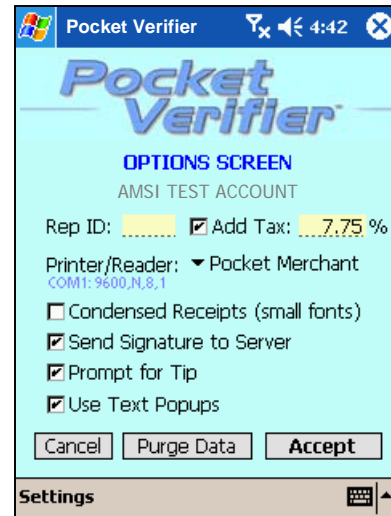
## Using Options

### 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 Pocket PC to use various printers (i.e., Pocket Merchant) and to setup a card reader or check reader.

### 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. [Signature Plus!](#) (a companion product to Pocket Verifier Professional) even allows to query results based on the Rep ID!



### Setting up a Printer, Card Reader and Check Reader:

Pocket Verifier Professional 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. You can also customize the receipt information and layout. See [Receipt Layout](#) at the end of this section.

If you are using the pocket spectrum with Bluetooth, you will need to setup the Copy settings and baud rate to match your Pocket PC.

### Important Note:

Some Pocket PC Devices and Smart Phones share the external Com Port with the IR or Bluetooth Port. Thus, you may receive a "Port already in use" error when entering the Credit Card Sales Screen or when trying to print a receipt. For Pocket PC2000, if the [Auto-detect Connection](#) is set for syncing your Pocket PC to your computer, each time you turn on the power of an attached device, the PDA will try to sync to your computer, click on the [Cancel](#) button to stop this process.

To solve these problems...

1. If your Pocket PC connects to the computer with a Serial Connection instead of a USB Connection, turn off the Auto-detect Connection for Active Sync. Also make sure Active Sync is not already running in the background  
Pocket PC2000 : [Start>Program>ActiveSync>Uncheck Auto-Detect Connection](#)  
Pocket PC2002 : [Start>ActiveSync>Tools Menu>Options>Uncheck Enable sync when cradled](#)  
Pocket PC2003/Windows Mobile : NA
2. Make sure [IR Auto-Receive](#) or [Beam Receive](#) is off.  
Pocket PC2000 : N/A  
Pocket PC2002/PC2003/Windows Mobile:  
[Start>Settings>Connections>Beam Icon>Uncheck the \(Beam\) Receiving checkbox](#)
3. Make sure your Network Settings are not set to use the Com Port  
[Start>Settings>Connections>Connections Icon>Check the settings used by the Network](#)

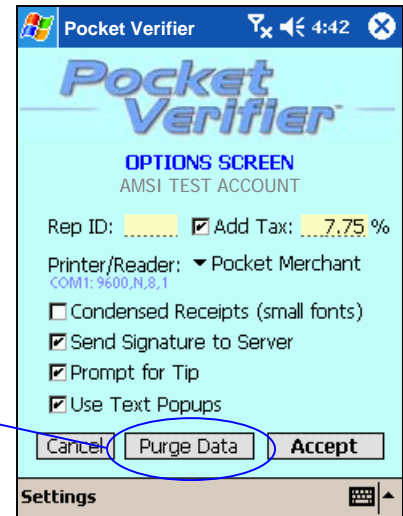
## Server-Side Signature Storage

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 and that a high connection speed can be established, as signature data can contain up to 2000 bytes.

## Deleting All Data for a Single Merchant Account

The IR/Serial Option screen also contains a button called: [Purge all 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 all data?](#) button. All the records stored in the [Transaction Manager](#) for the current account will be deleted.

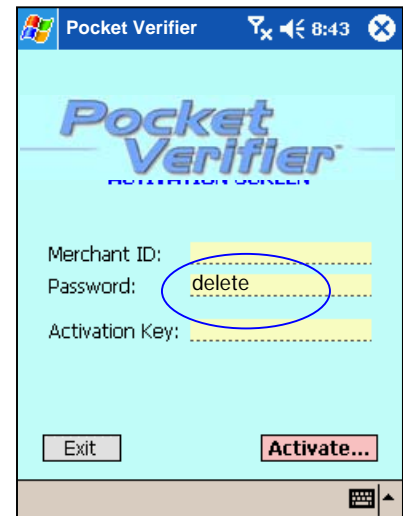
Click here to delete all transaction records for the current Merchant Account.



## 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 the [Merchant ID](#) text area, 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).

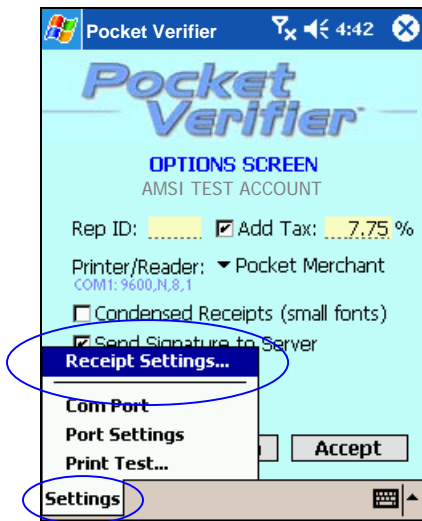


## Receipt Layout

Pocket Verifier Professional gives you the ability to modify receipt information. To do this, click on the [Settings](#) menu and choose [Receipt Settings...](#) From the [Receipt Layout](#) screen, you can then add custom headers and footers, set up formatting such as Bold or Plain text; Left, Center, or Right justification; or even over-ride the large and small font settings when using the Condensed Receipts option.

When selecting a service receipt, tip and total line areas will appear on a receipt for manual entry by the customer. You can even display a tip suggestion on the receipt! Transactions that already have a tip added will not show tip and total lines since the amounts have already been automatically calculated.

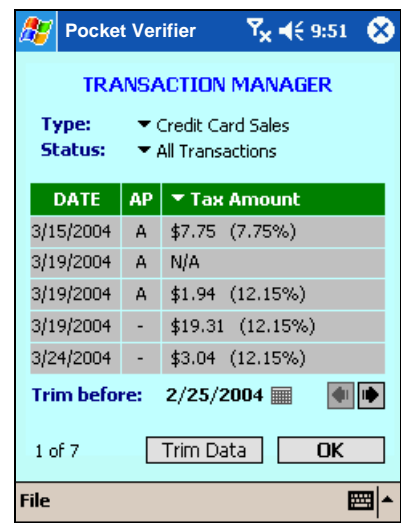
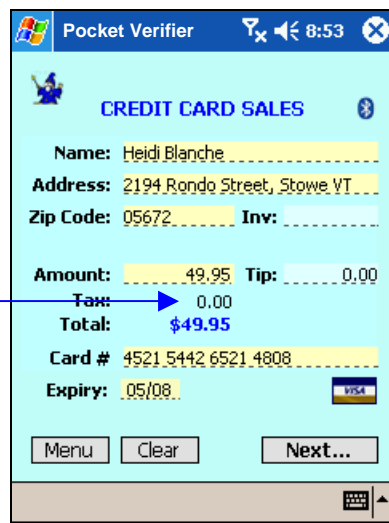
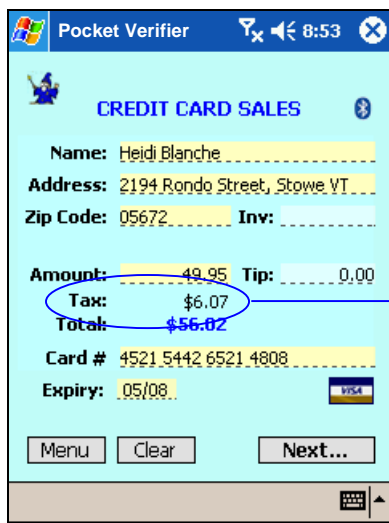
Play with the various options and click [Print Sample](#) to see how your receipts will appear.



Note:  
For security reasons, the Merchant Name (i.e., the **TEST ACCOUNT** shown here) cannot be changed or removed from the receipt.

## Using Auto Tax

Pocket Verifier Professional allows you to automatically add tax to your sale. Click [Add Tax](#) in [Options](#) and enter a [Tax Rate](#). Then each time you go to a new sale screen, the tax will automatically be displayed and added to the [Total](#) of the sale. Once you save or process the transaction, the tax cannot be changed or removed.



Click on the [Tax label](#) or [value](#) on the sales screen to toggle adding tax on and off.

This is ideal if you sell various services and/or products that may or may not be taxable. The amount of tax added to a sale and the tax rate at the time of the sale can also be seen in the [Transaction Manager](#) by selecting [Tax Amount](#) from the item list.