

# Pocket Verifier Quick Start

HTC Pure (800 x 480 Windows Mobile 6.5 Devices)



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## Introduction

Please take a few minutes to read through this document. It will help you become familiar with the main features of Pocket Verifier and provide you with a smooth process to preparing your phone to process credit cards using the Pocket Spectrum Bluetooth card reader and printer.

After reading through this quick start, you will learn how to

- Install the Pocket Verifier Software
- Setup the Pocket Spectrum to use with your phone
- Setup your merchant account
- Swipe a credit card and take a sale
- Issue a void from the Transaction Manager
- How to use your online merchant account to view your Pocket Verifier sales

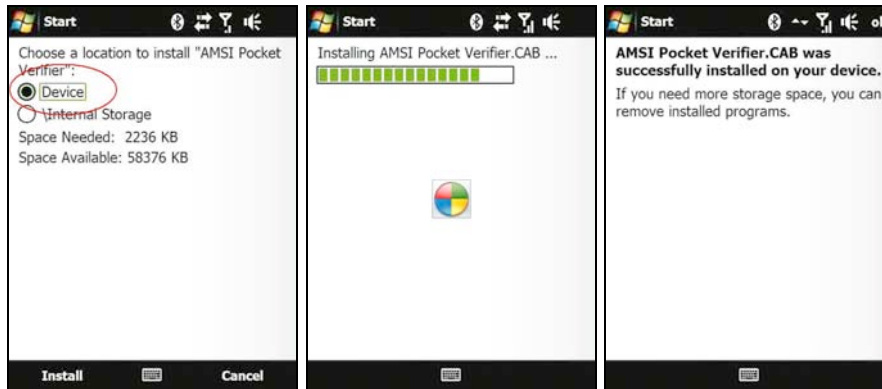
The document uses a test account called MAC Tools Demo (The TC Logon/Merchant ID is 10600). Where indicated, we recommend that you enter your own merchant account information to activate the software and follow along. If you do not yet have your merchant account, please contact your merchant provider to get the necessary information.

## Installing the Pocket Verifier Software

To install Pocket Verifier, you must first be able to synchronize information between your computer and your phone (see your HTC Pure Manual for details on how to do this). You must also have the installation file PVP.Pure.exe. If you do not have this file, contact your merchant provider on how to obtain it (i.e., internet download or CD).

### To install the software:

1. Connect your phone to the computer
2. Double-click on the **PVP.Pure.exe** installation file
3. Follow the prompts on the screen
4. Select **Device** as the location to install the files (due to security reasons, Pocket Verifier will not work if \Internal Storage is selected)



5. Once the installation is complete, Pocket Verifier will appear on your home screen. To move it to the top of the list, **Touch and Hold** the icon to open up the menu and select **Move to Top**.



Note: Before starting Pocket Verifier, we recommend that you setup the Bluetooth connection with the Pocket Spectrum first.

## Setting up the Pocket Spectrum

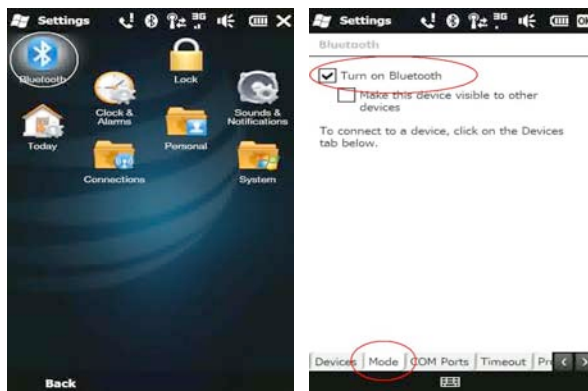
The Pocket Spectrum must first be paired with your phone before it can be used. Due to the need to enforce high encryption standards between your phone and the Pocket Spectrum, the Pocket Spectrum can only be paired to one phone. If you want to pair the Pocket Spectrum to another phone (or computer) you will need to reset the Pocket Spectrum back to its default factor settings.

To avoid any problems in the Bluetooth pairing process, make sure that:

- The Pocket Spectrum is fully charge
- Your phone is fully charged or plugged in
- You are at least 3 feet away from any interference (i.e., Cordless phone)
- The Pocket Spectrum and phone approximately 1 to 2 feet apart

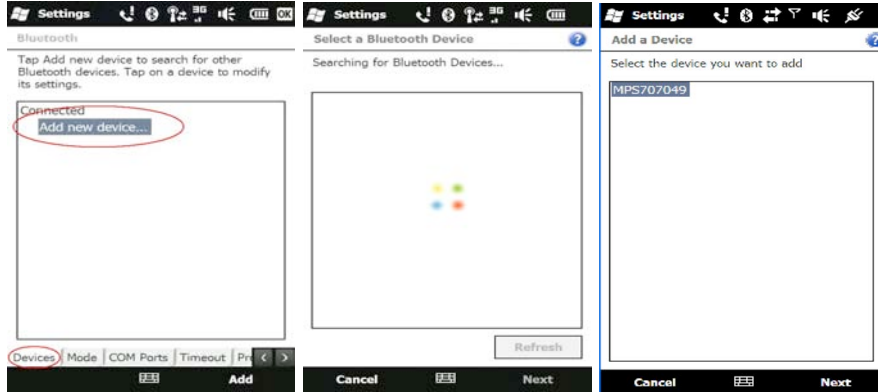
### To Pair the Pocket Spectrum with your phone:

1. Turn on the Bluetooth connection to your phone  
[Start > Settings > Bluetooth > Mode tab](#)



2. Reset the Pocket Spectrum (when it is off) by pressing and holding the Power button for 3 seconds. The paper will advance displaying diagnostic information – which indicates that the Pocket Spectrum was reset to its factory settings.
3. Select the [Devices](#) tab under [Settings](#)
4. Tap [Add new device...](#)
5. Select the device that appears on the list the starts with MPS (i.e., MPS707049)

6. Tap **Next**



7. Enter Passcode **1000**

8. Tap **Next**

9. Once your phone (Pocket PC) has been connected with the Pocket Spectrum (i.e., MS707049), tap **Advanced**



10. Select the **Serial Port** service

You can also (optionally) change the Display Name to something more meaningful. In this example the name was changed from MPS707049 to Spectrum.



11. Tap **Save**

Your Pocket Spectrum now appears as a new device.

12. Turn OFF the Pocket Spectrum

Next you need to assign an *Outgoing Port* that Pocket Verifier can recognize.

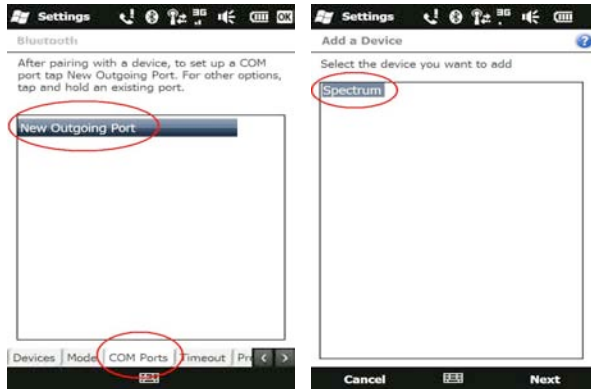


Turn the Pocket Spectrum OFF  
So that the new settings are  
stored in the device.

13. Select the COM Ports tab

14. Tap on New Outgoing Port

15. Select the Pocket Spectrum device (i.e., Spectrum), then tap Next

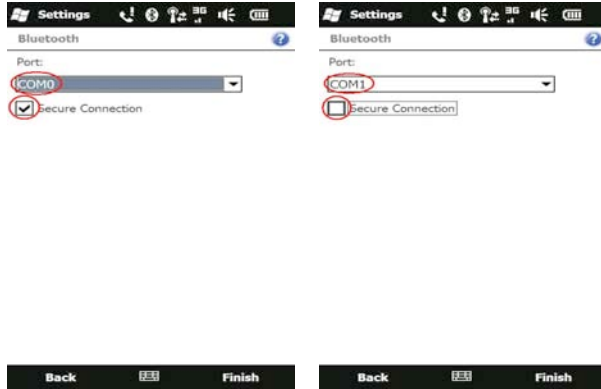


16. Assign the **Port** as **COM1**

If this COM Port is not available, select the next available one.

*Note: Pocket Verifier cannot use COM0.*

17. **Uncheck Secure Connection** (the Spectrum uses its own security protocols)

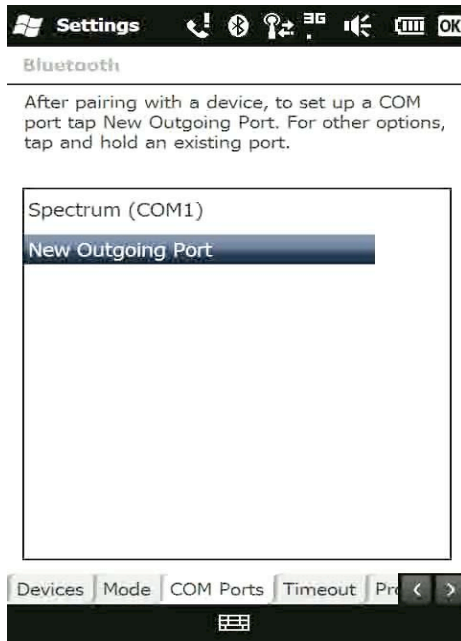


18. Tap Finished

The Pocket Spectrum is now successfully paired and set up with your phone.

In the example below Spectrum is assigned to COM1.

You can now exit the settings screen and return back to the home screen.



## Setting up your Merchant Account

After installing the Pocket Verifier software and setting up the Pocket Spectrum to work with your phone, the next steps are to set up your merchant account, activate the software, and to verify your program settings.

The steps below use a sample merchant account, 10600. We recommend that you follow along and use the merchant account that was assigned to you by your merchant provider.

### To Setup your Merchant Account

1. Start Pocket Verifier
2. Tap **ok** to setup your merchant account
3. Enter your **Merchant ID** (TC Log On ID) and **Password**

*Note: The default input setting for the HTC Pure is XT9. You might find it useful to change to ABC. In addition, when entering numbers into the supplied text areas, select the 123 key.*



4. Enter your **Activation Key**

You should have received this key from your merchant provider when you purchased the software.

5. Tap **Activate**



6. Select your network connection

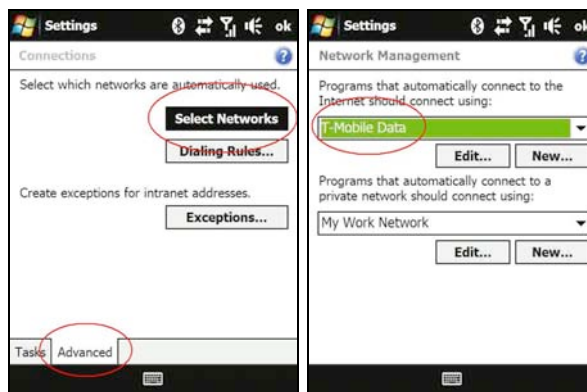
Since this is the first time you are using Pocket Verifier, you must set up your network connection. Pocket Verifier will use this connection when it needs to access the merchant gateway through the Internet. The HTC Pure should have automatically set up your data connection after you installed your SIM.

For AT&T / Cingular, select **Media Net**

For T-Mobile, select **T-Mobile Data**

To see what network your provider has automatically set you up with:

- a. [Start Menu > Settings > Connections > Connection icon](#)
- b. [Advanced tab > Select Networks button](#)
- c. Make note of the name used for Internet connections (i.e., T-Mobile Data)
- d. Exit the settings screen and return to the *Pocket Verifier Account Activation* screen



Make sure you have a signal and Tap on Activate

In this example T-Mobile Data is used.

If the connection is not correct, then tap on the rotating arrows to stop the connection and select a different network from the right Menu button.

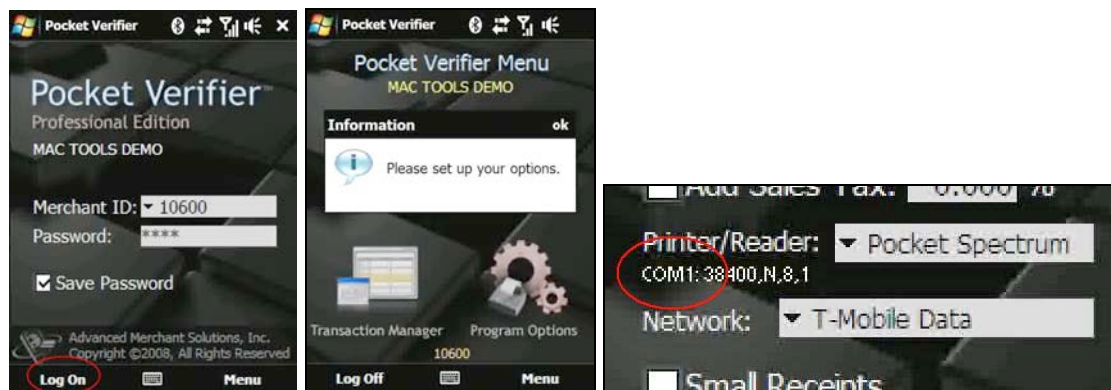


7. Once your merchant account is validated and activated, tap Log On

The Main Index will appear where you will be able to process sales, few exiting sales, change program settings, and exit the program (Log Off).

If it is the first time you are using Pocket Verifier, then you will be asked to set up your options.

In this case, simply make sure that the [Printer/Reader](#) is set up as **Pocket Spectrum** on **COM1** (this is the default setting for the program) and select [Accept](#). The COM Port can be changed by selecting [Menu > Set COM Port](#).



# How to Swipe a Credit Card and Take a Sale

Now that everything is set up, you are ready to process credit cards. In this Quick Start Tutorial you are going to use your own credit card to process a \$1.00 sale (don't worry – it will be voided in the next tutorial).

## Start from the Beginning:

1. Turn off the Pocket Spectrum  
If the Pocket Spectrum is on, turn it off – we'll assume that you're starting your first sale of the day.
2. Exit out of the Pocket Verifier Software  
To do this, tap on the **Log Off** button from the main Pocket Verifier Menu screen. You can go back to the Pocket Verifier Menu by tapping always the **Back** button or **Menu** button and **Back** menu item.



## An Important note about the Pocket Spectrum and the Sales Screen:

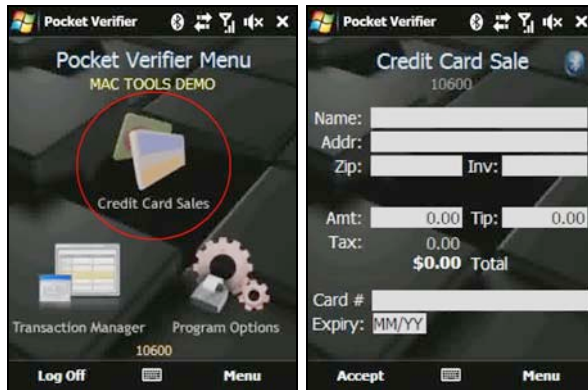
Each time you go to the sales screen from the Pocket Verifier Menu, the software will look for the Pocket Spectrum and make sure it has a secure connection. If you did not have the Pocket Spectrum on, then you must re-establish the connection. To do this, tap the Bluetooth icon on the Credit Card Sales screen.



Pocket Spectrum is turned off

## Your First Sale:

1. Start Pocket Verifier
2. Log On
3. Turn on the Pocket Spectrum
4. Wait until you hear series of beeps followed by one beep  
Multiple green lights, followed by a single red light  
If the red light is flashing, it means that your battery is low.  
If the red light is constantly one, make sure there is paper in the unit.
5. Tap on the Credit Card Sales icon



6. Swipe your credit card through the reader  
Left-to-Right with the magnetic strip facing towards the green light.  
You should hear a single beep. Multiple beeps indicate a bad read.

The Amount Screen should appear after a successful read.

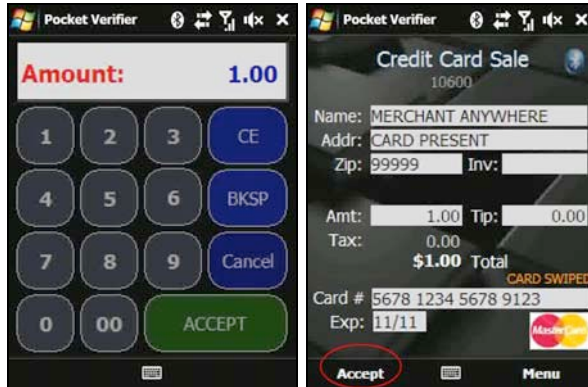
If you hear a single beep and the amount screen does not appear, try to reset the Bluetooth connection by tapping on the Bluetooth icon to re-establish the connection.



Successful Swipe →



7. Enter **one dollar** (\$1.00)
8. Tap **Accept**  
If the Tip screen appears, enter tap Accept
9. Verifier that your name appears correctly  
You do not need to enter any other information on this screen.
10. Tap **Accept**

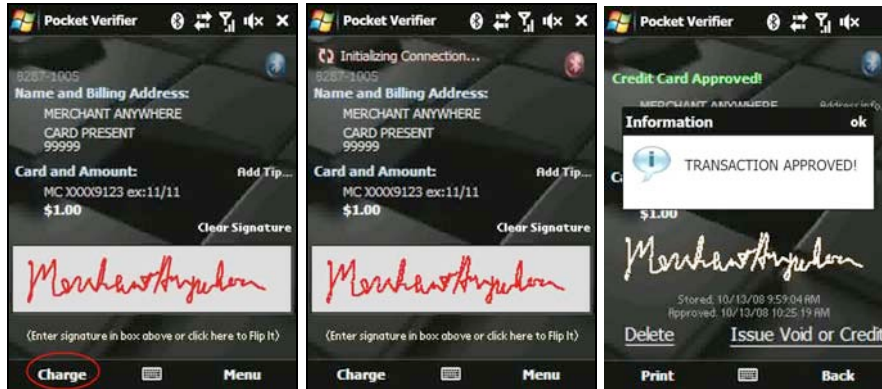


11. Sign your name in the box provided  
Alternatively, you can click on the Flip It text to invert the screen. This way you can keep holding the phone while your customer signs in the box.



## 12. Tap [Charge](#)

A secured online connection is established with the bank and the sales information is sent for processing. After a short time (depending on your connection) the sale is approved. When the Transaction Approved message appears, press the phone's circular button to close the message box.



## 13. Tap [Print](#)

A sales receipt with the Authorization Code and Transaction ID is printed and can be handed to the customer. Alternatively you can print two receipts. One for your customer and one for your record that the can also be signed.



**Congratulations! You have just made your first sale!**

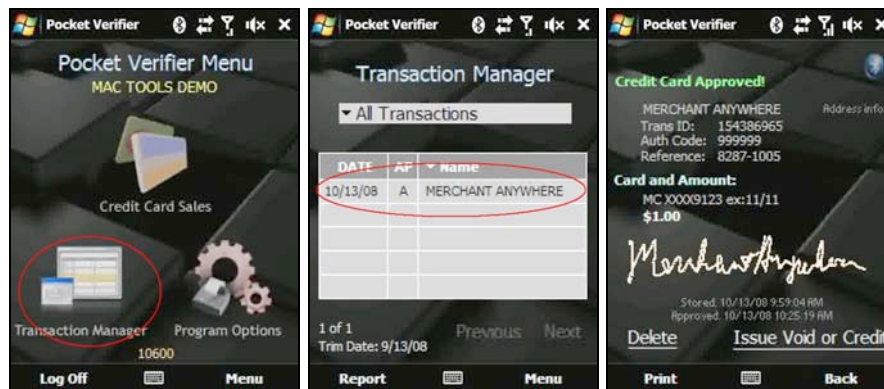
## 14. Tap [Back](#)

This brings you back to the Pocket Verifier Menu screen where you will now use the Transaction Manage to issue a void on the sale you just made.

## How to Issue a Void from the Transaction Manager

After a Credit Card transaction is completed, your merchant provider will automatically batch out any approved transactions before the next day. If a sale has not yet been batched out, you can void the sale. Issuing a void or a credit depends solely on whether that sale was batched out (contact your merchant provide or review the information that came with your merchant welcome kit for more details). In the case below, it is assumed that you just finished the previous tutorial and successfully made your first \$1.00 sale using your credit card. As a result, you should see one item in the Transaction Manager with your name. This is the item that you will use to issue a void. The information in example below will differ from yours.

1. Go to the Pocket Verifier Menu
2. Tap on the [Transaction Manager](#) icon
3. Tap on the first (and only) item in the list



4. Tap on [Issue Void or Credit](#)
5. Follow the prompts on the screen to issue the void and after a few minutes the transaction will be removed from the Transaction Manager.



# Using your Online Account

To see your transaction using a computer and an Internet browser follow these steps:

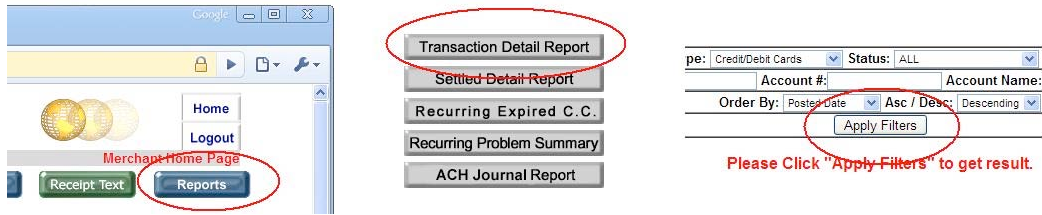
1. Open your Internet browser
2. Go to [EnterTransactions.com](http://EnterTransactions.com)
3. Click on [Enter Transaction Central](#)



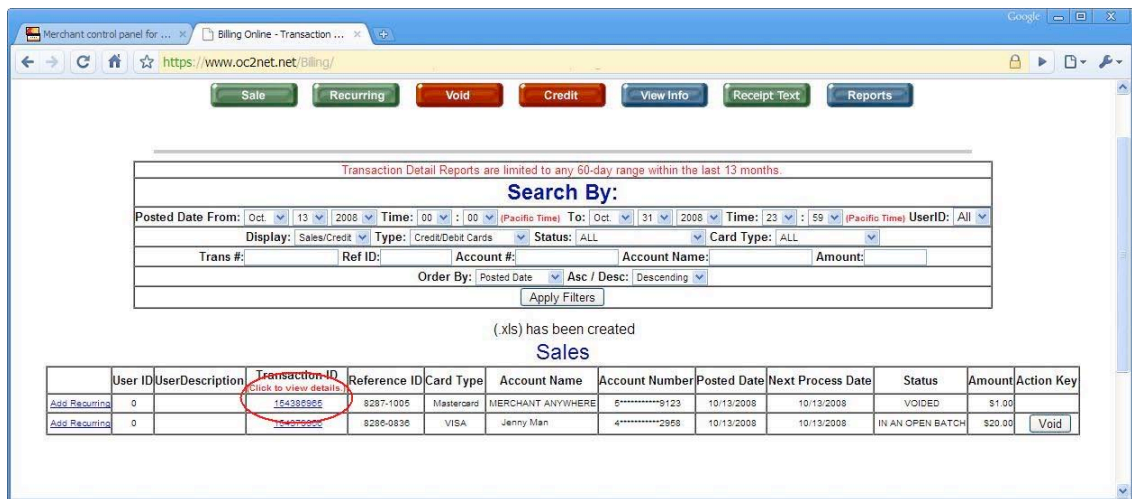
4. Log in to your account using the same log on information that you entered in for Pocket Verifier and click the [Logon](#) button



5. Click on **Reports**
6. Click on **Transaction Detail Report**
7. Using the default settings, click on **Apply Filters**



8. Click on the Transaction ID of the sale item you recently processed



9. Click on **View Receipt**  
You can see the signature of the transactions you just processed and voided out.  
(Note: Some browsers may not display the signature correctly)

