<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transaction History</td>
<td>27</td>
</tr>
<tr>
<td>View</td>
<td>27</td>
</tr>
<tr>
<td>Search and Filter</td>
<td>27</td>
</tr>
<tr>
<td>Sort</td>
<td>28</td>
</tr>
<tr>
<td>Creating a Ticket</td>
<td>28</td>
</tr>
<tr>
<td>Credit Sale</td>
<td>33</td>
</tr>
<tr>
<td>Cash Sale</td>
<td>36</td>
</tr>
<tr>
<td>Check Sale</td>
<td>39</td>
</tr>
<tr>
<td>Recurring Sale</td>
<td>42</td>
</tr>
<tr>
<td>Cancel a Recurring Sale</td>
<td>45</td>
</tr>
<tr>
<td>Refund</td>
<td>47</td>
</tr>
<tr>
<td>Email Receipt</td>
<td>49</td>
</tr>
</tbody>
</table>
Overview

QuickSwipe is a mobile payment application that allows you to process credit card, check, and cash transactions using an iOS device. QuickSwipe allows you to maintain a catalog of items for transactions and manage which users have access to the application. QuickSwipe also has a web interface which allows you to view transaction history, manage the catalog, and manage users and settings.

Hardware

Devices

The QuickSwipe iOS app works on any iOS device running iOS version 6.0 or above.

Card Reader

QuickSwipe supports the IDTECH mobile magstripe reader. Connect the IDTECH card reader to the audio port or your iOS device.

Note: Do not open QuickSwipe when you are connected to headphones. QuickSwipe emits a loud sound through the audio port to determine if the swipe is attached.
iOS Settings

Enabling Location Services

QuickSwipe requires location services to determine the location of transactions. When you first run QuickSwipe, QuickSwipe asks to use your current location. Tap OK.

If location services are disabled, you must re-enable location services.

To enable location services, follow these steps:

1. From the home screen, tap **Settings**.

   The settings screen displays:

   ![Settings Screen with Privacy Selected]

2. Tap **Privacy**.
The privacy settings display:

3. Tap **Location Services**.

   The list of apps that have access to location services display. If location services are not enabled in QuickSwipe, it will look like this:

4. If location services are not enabled, tap **QuickSwipe** to enable location services.
When location services are enabled, it will look like this:

![Location Services screenshot](image)

**Enabling Microphone Access**

In order to use the IDTECH mobile magstripe reader, QuickSwipe requires access to the microphone in iOS. By default, QuickSwipe has access to the microphone. However, if microphone access is disabled, the card reader will no longer work.

To enable microphone access, follow these steps:

1. From the home screen, tap **Settings**.
The settings screen displays:

2. Tap **Privacy**.
The privacy settings display:

3. Tap **Microphone**.

The list of apps that have access to the microphone display. If microphone access is not enabled in QuickSwipe, it will look like this:

4. If microphone access is not enabled, tap **QuickSwipe** to enable microphone access.

When microphone access is enabled, it will look like this:
Log In

To log in to the iOS app, follow these steps:

1. Tap the QuickSwipe icon on your home screen.

   The following screen displays:

   ![QuickSwipe icon]

   ![Login screen]

2. Enter the following information:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>Your PayConex ID.</td>
</tr>
<tr>
<td>User</td>
<td>The email address at which you received your invite.</td>
</tr>
<tr>
<td>Password</td>
<td>The password you created when you followed the instructions in the</td>
</tr>
</tbody>
</table>
<pre><code>         | invite email.                                                      |
</code></pre>

3. Tap **Login**.

   The transaction screen displays:
If you forgot your password, tap the **Forgot password?** link to reset your password. Enter your account number and email address. QuickSwipe emails instructions for resetting your password.

**Main Menu**

Use the main menu to access the functions of QuickSwipe.

To access the main menu, tap 📲. The main menu displays:
Management

The management section of the application allows you create and edit users (web only) and update settings for the application.

- **Managing users (web only)** - Each account can have any number of users enabled to log in to the web application and iOS app. Use the web interface to add, edit, and disable users and determine the actions each user can take in QuickSwipe.

- **Updating settings** - The settings area allows you to customize the type of information prompted for in each transaction, clerk permissions and taxes as well as to customize the interface to match your company.

Settings

To access settings, tap \(\text{\textcircled{}}\) to view the main menu and select **Settings**. The following screen displays:
Make the desired edits to the settings. The edits take effect as soon as you make a change.

**Taxes**

If taxes are enabled under General Settings, taxes will be added to transactions by default. Each item can have a single tax setting applied to it in the catalog. The default tax is applied to items without a tax setting.

To edit taxes, select **Set Up Taxes**.

The taxes list displays:

<table>
<thead>
<tr>
<th>Taxes</th>
<th>Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default Tax</td>
<td>9.25%</td>
</tr>
<tr>
<td>No Tax Applied</td>
<td>0.00%</td>
</tr>
<tr>
<td>Illinois State Tax</td>
<td>6.25%</td>
</tr>
<tr>
<td>County Tax</td>
<td>2.25%</td>
</tr>
<tr>
<td>Mitch Man Tax</td>
<td>0.01%</td>
</tr>
</tbody>
</table>

To edit an existing tax, follow these steps:

1. Tap the tax you want to edit.
The following window displays:

2. Enter the display name in the Name field. Enter the percentage of the tax in the Tax field. For example 4.9 is 4.9%.
3. Tap **Save** to update the tax.

To add a new tax, follow these steps:

1. Tap **Add New Tax**.

   The following window displays:

   2. Enter the display name in the Name field. Enter the percentage of the tax in the Tax field. For example 4.9 is 4.9%.
   3. Tap **Save** to add the tax.
General Settings

General settings are listed below Set Up Taxes. The following table describes the general settings:

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Disable Taxes</td>
<td>Select to not add tax amounts to transaction amounts.</td>
</tr>
<tr>
<td>Enable Tipping</td>
<td>Select to require a tip prompt to display during the payment flow.</td>
</tr>
<tr>
<td>Disable Refunds</td>
<td>Select to not allow refund transactions.</td>
</tr>
<tr>
<td>Require ZIP Code</td>
<td>Select to require customer's enter a ZIP code during transactions.</td>
</tr>
</tbody>
</table>

Clerk Permissions

Clerk permissions allow you to set rules for which actions clerk users can perform in QuickSwipe. Select any of these options to allow clerk users to perform the task:

- View and Edit Catalog Items
- Retire Catalog Items
- Apply Tax Exempt Status to Transactions
- Apply Discounts to Transactions
- Refund Transactions
Branding

Company Info

The Company Info section contains the contact information for your company. This information is included on receipts generated through QuickSwipe.

To edit your company info, select Company Info & Logo. The follow screen displays:

Email  hello@vokalinteractive.com
Phone  (312) 527-4719
Street  223 W. Erie St., Suite 5NW
City  Chicago
State  Illinois
ZIP Code  60654
Website  http://vokalinteractive.com/
Facebook  https://www.facebook.com/vokalinteractive
Twitter  VOKALmobile

Tap the image at the top and select an image to update the company logo.
Edit the desired contact fields. Email, Street, City, and ZIP Code are required.
Tap Save to complete changes to your company info.
**Application Colors**

The Application Colors section allows you to customize the color of the interface to match your company's color scheme.

To edit the application colors, select **Application Colors**. The following screen displays:

Select a new color by tapping on one of the colors in the palette that displays or by entering the [hex code](#) in the HEX field.

Tap **Save** to complete changes to your application colors.
Catalog

The catalog is a list of pre-defined items that you can add to a ticket. Each item has properties and a price. Items are organized into categories to make them easier to find. Items can belong to more than one category.

View

To view the catalog, tap to view the main menu and select Catalog. The catalog displays:

Tap a category to view all items in that category.
Search and Filter

You can search the list of items for a specific term by entering that term in the Search field and tapping **Enter**.

You can filter the list of items displayed in the catalog by tapping **Filter** at the top of a list of items. The filters display:

- Select **Favorites** to show only items marked as favorites.
- Select **Recurring** to show only recurring sale items.
- Select **Retired** to show only items that have been retired from the catalog and are no longer available for sale.
- Enter a minimum and/or maximum price to show items that fall within a price range.

Sort

You can sort the items by name or price. To sort, tap **Filter** and select the desired option under the sort menu.

Categories

Use categories to organize items in the catalog. Items can belong to more than one category.

- [Adding Categories](#)
- [Editing Categories](#)
• **Deleting Categories**

**Adding Categories**

To add a category, follow these steps:

1. From the catalog list, tap **New Category**.
   The following screen displays:

   ![Category Details Screen](image)

   ![Name Field](image)

2. Tap the icon and select an image to set an image for the category.
3. Enter the name for the category in the Name field.
4. Tap **Create**.

**Editing Categories**

To edit a category, follow these steps:

1. From the catalog list, tap **Edit** next to the Category you want to edit.
The following screen displays:

2. Tap the icon and select an image to set an image for the category.
3. Enter the name for the category in the Name field.
4. Tap Update.

Deleting Categories

To delete a category, follow these steps:

1. From the catalog list, tap Edit next to the Category you want to edit.
The following screen displays:

2. Tap **Delete Category**.
   A confirmation message displays.
3. Tap **Okay**.

**Items**

Items are anything that can be added to a ticket for a customer to pay for. Use this feature to set up the properties of the item, such as price, image, and recurring status.

- **Adding Items**
- **Editing Items**
- **Retiring Items**

**Adding Items**

To add a new item, follow these steps:

1. From the catalog list, select a category then tap **New Item**.
The following screen displays:

2. Tap the icon and select an image to set an image for the item.
3. Use the following table to complete the fields on this screen:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Required. Enter the name of the item to display in the catalog and on tickets.</td>
</tr>
<tr>
<td>Price</td>
<td>Required. Enter the price of the item.</td>
</tr>
<tr>
<td>SKU</td>
<td>Required. Enter the SKU (stock keeping unit) that identifies the item. If you do not use SKUs for your business, simply enter a random character to complete this field.</td>
</tr>
<tr>
<td>Type</td>
<td>Select whether the item is a one-time purchase item or a recurring item. One-time purchase items are billed only once at the time of sale. Recurring items are billed at an interval that you set. If you select Recurring, the following screen displays:</td>
</tr>
<tr>
<td>Notes</td>
<td>Add any additional details about the item that will display in the catalog.</td>
</tr>
<tr>
<td>Tax</td>
<td>Select the tax that applies to the item. Only one tax can be applied to an item.</td>
</tr>
<tr>
<td>Categories</td>
<td>Select any categories that the item will be displayed under in the catalog. An item can belong to zero or more categories.</td>
</tr>
<tr>
<td>Favorite</td>
<td>Select Favorite to mark the item as a favorite for catalog searches.</td>
</tr>
</tbody>
</table>

4. Tap **Create** to add the item.
**Editing Items**

To edit an item, follow these steps:

1. From the catalog list, tap the item you want to edit.

The following screen displays:

![Item Details Screen]

- **Name**: ac
- **Price**: $158.00

**Details**

- **SKU**: 85943ED8-ED55-D61C-DC3B-191442D970CF
- **Created By**: Jane Doe
- **Date Created**: Unknown
- **Last Modified**: Unknown

**Type**

- **One-Time**
- **Recurring**

**Notes**

Sed diam lorem, auctor quis,
2. Tap **Favorite** to mark the item as a favorite for catalog searches.

3. Use the following table to complete the item details:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Required. Enter the name of the item to display in the catalog and on tickets.</td>
</tr>
<tr>
<td>Price</td>
<td>Required. Enter the price of the item.</td>
</tr>
<tr>
<td>SKU</td>
<td>Required. Enter the SKU (stock keeping unit) that identifies the item. If you do not use SKUs for your business, simply enter a random character to complete this field.</td>
</tr>
<tr>
<td>Type</td>
<td>Select whether the item is a one-time purchase item or a recurring item. One-time purchase items are billed only once at the time of sale. Recurring items are billed at an interval that you set. If you select Recurring, the following screen displays:</td>
</tr>
<tr>
<td>Notes</td>
<td>Add any additional details about the item that will display in the catalog.</td>
</tr>
</tbody>
</table>

4. To edit the tax for the item, select the tax that applies to the item. Only one tax can be applied to an item.

5. To edit the categories for the item, select any categories that the item will be displayed under in the catalog. An item can belong to zero or more categories.

6. Tap **Update** to complete the edit.
Retiring Items

When you want to remove an item from the catalog, you retire the item. The item is no longer available to be added to tickets; however, it remains in QuickSwipe for reporting on previous sales.

**Note:** Depending on settings, clerks may not have permission to retire items.

To retire an item, follow these steps:

1. From the catalog list, tap the item you want to retire.
   The item details screen displays.
2. Tap **Active** to retire the item.
3. Tap **Update** to retire the item.
Transactions

QuickSwipe allows you to perform credit, check, cash, and recurring sale transactions.

With either the iOS app or the web application, you can:

- View your transaction history
- Perform refunds
- Cancel recurring transactions
- Email receipts

Transaction History

The transaction history screen shows you all of your past transactions and allows you to perform refunds, email receipts, and cancel recurring transactions.

View

Tap to view the main menu and select Transaction History.

The Transaction History displays.

Tap any transaction in the list to view transaction details.

Search and Filter

You can search the list of transactions for a specific term by entering that term in the Search field and tapping Enter.
You can filter the list of transactions by tapping **Filter** at the top the transaction history. The filters display:

- Select **Tips** to show only transactions that include a tip.
- Select **Discounted** to show only transactions with a discount applied.
- Select **Recurring** to show only recurring transactions.

**Sort**

You can sort the items by name or price. To sort, tap **Filter** and select the desired option under the sort menu.

**Creating a Ticket**

To create a ticket for a sale, follow these steps:

1. Tap ▼ to view the main menu and select Transactions.
The transaction screen displays.

2. To add an item from the catalog to the ticket, select the category then select the item from the catalog.

3. If the item displays with a 🔄 icon, this is a recurring sale item. You can only include one recurring sale item in a transaction and cannot mix recurring items with regular items. For more information, see Recurring Sale.
4. To add a custom item to the ticket, tap 💼, enter the item amount and tap ➡️.
5. Tap any item on the ticket to view item details.

```
    Cancel  Ticket Item  Update

    Custom Item

    Quantity  1  −  +

    Tax

```

Use the + and - buttons to adjust the quantity. Tap Update to adjust the quantity.

6. Tap an item on the ticket then tap Remove to remove the item from the ticket.

7. Tap ✍️ to add a note to the transaction which will display in the transaction history and on the receipt.

The following screen displays:

```
    Cancel  Notes  Save

    Notes  Add a note to this transaction.
```

© 2013 Bluefin Payment Systems, All rights reserved.
Tap the icon to add an image to the transaction note.

Enter the note and tap **Save** to save the note.

8. If the clerk has permission to add a discount to the ticket, tap **Discount** to add a discount.

   The following screen displays:

   ![Add A Discount](image)

   Enter the name for the discount to appear on the receipt. Enter the amount of the discount and select whether the amount is a dollar or percent amount. Tap **Apply Discount** to apply the discount to the ticket.

9. If the clerk has permission to override the tax, tap **Tax** to override the tax amount for exempt customers.

   The following screen displays:

   ![Override Tax](image)

   Select **Tax Exempt** to remove taxes for the transaction if the customer is tax exempt.

10. Tap ✗ to clear the list of items.

11. The subtotals of the transaction display at the bottom of the screen.

12. When you have completed the ticket, tap **Charge** to start the payment process.
The Payment screen displays.

If the card reader is attached, swipe the card to complete a credit card sale. Or, tap **Enter Card Info** to manually key in the credit card information. See [Credit Sale](#) for instructions.

Tap **Cash** to pay with Cash. See [Cash Sale](#) for instructions.

Tap **Check** to pay with a Check. See [Check Sale](#) for instructions.
Credit Sale

To perform a credit card sale, follow these steps:

1. Follow the steps in Creating a Ticket to complete a ticket and tap Charge.

   The Payment screen displays:

   2. Swipe the credit card and continue to step 4. Or, to manually enter the card details, tap Enter Card Info.
The Credit Card screen displays:

3. Enter the customer's address and tap **Complete Transaction**.

4. If tips are enabled, the Add Tip screen displays:

Select the percentage amount or enter a custom amount. The total updates.

5. Tap **Charge**.
The Complete Transaction screen displays:

6. Have the customer sign on the device then tap **Charge**.

The Transaction Complete Screen displays, showing any amount of change.

7. To email the customer a receipt, enter the customer's email address in the Send Receipt field and tap **Done**. Otherwise, tap **Done** to complete the transaction.
Cash Sale

To complete a cash sale, follow these steps:

1. Follow the steps in Creating a Ticket to complete a ticket and tap Charge.
   The Payment screen displays:

   2. Tap Cash.

   ![Payment screen with Cash option](image)

   a. Swipe Card
   b. Enter Card Info
   c. Check
The cash screen displays:

3. Enter the amount of cash the customer presents and tap **Complete Transaction**. QuickSwipe requires the cash amount to be at least equal to the amount of the transaction.
4. The Transaction Complete Screen displays, showing any amount of change.

5. To email the customer a receipt, enter the customer's email address in the Send Receipt field and tap Done. Otherwise, tap Done to complete the transaction.
Check Sale

To complete a check sale, follow these steps:

1. Follow the steps in Creating a Ticket to complete a ticket and tap Charge.

   The Payment screen displays:

   2. Tap Check.
The Check screen displays:

3. Select whether the check is from the customer's checking or savings account.
4. Enter the name on the account and the account and routing number.
5. Enter the customer's address.
6. Tap Complete Transaction.
7. If tips are enabled, the Add Tip screen displays:

Select the percentage amount or enter a custom amount. The total updates.

8. Tap **Charge**.

The Complete Transaction screen displays:

9. Have the customer sign on the device then tap **Charge**.
The Transaction Complete Screen displays, showing any amount of change.

10. To email the customer a receipt, enter the customer's email address in the Send Receipt field and tap **Done**. Otherwise, tap **Done** to complete the transaction.

**Recurring Sale**

Recurring transactions allow merchants to enter transactions that repeat on a regular basis, such as for subscription items or recurring services. Recurring transactions include one item on a ticket. The time period of the recurring transaction is set in the **catalog item**.
**Note:** Only one recurring sale item can be included on a ticket. If you try to add more items, the following error message displays:

![Error](image)

This item cannot be added. Recurring items must be completed individually.

To perform a recurring sale, follow these steps:

1. Tap to view the main menu and select Transactions.
The transaction screen displays.

2. To add an item from the catalog to the ticket, select the category then select the item from the catalog. Recurring items are indicated by a ⌁ icon.

You can only include one recurring sale item in a transaction and cannot mix recurring items with regular items.

3. Tap the recurring item to add it to the ticket and tap Charge.
The Payment screen displays.

If the card reader is attached, swipe the card to complete a credit card sale. Or, tap Enter Card Info to manually key in the credit card information. See Credit Sale for instructions.

Tap Check to pay with a Check. See Check Sale for instructions.

**Cancel a Recurring Sale**

To cancel a recurring sale transaction, follow these steps:

1. Tap to view the main menu and select Transaction History.
The Transaction History displays:

2. Tap the transaction in the list to cancel. Recurring sale transactions display with a icon. See Transaction History for instructions on filtering the list.

The transaction details display:

3. Tap End Billing.

The following message displays:
4. Tap **Okay**.

All future transactions for this item are canceled.

**Refund**

**Note:** A transaction can only be refunded once.

To refund a transaction, follow these steps:

1. Tap to view the main menu and select **Transaction History**.

The Transaction History displays:

2. Tap the transaction in the list to refund. See **Transaction History** for instructions on filtering the list.
The transaction details display:

3. Tap **Refund**.

The refund screen displays:

4. Select the items from the ticket to refund or tap **Select All** to refund all items.
5. Enter an optional reason for the refund.
6. Tap **Refund** to complete the refund.

**Email Receipt**

To email the receipt for a transaction, follow these steps:

1. Tap ☰ to view the main menu and select **Transaction History**.

   The Transaction History displays:

   ![Transaction History](image)

   2. Tap the transaction in the list whose receipt you want to email. See [Transaction History](#) for instructions on filtering the list.

   The transaction details display:

   ![Transaction Details](image)

   3. Tap **Email**.
The Send Receipt screen displays:

4. Enter the customer's email in the Email Address field.
   Tap **Send** to email the receipt.