SwipeSimple Terminals
User Guide

Powered by: SwipeSimple

Payments. Your Way.

Contents

Welcome to SwipeSimple Terminals. This User Guide will provide all the information you need to get set-up and begin accepting credit and signature debit card transactions using SwipeSimple Terminals with the PAX A920.

Additional information can be found at the [SwipeSimple Terminals Support Portal.](SwipeSimple Terminals Support Portal)

1. Device Set Up and Configuration

Important Notes:

- The term "Device" in this User Guide refers to your PAX A920 device.
- Please be sure to charge the terminal overnight prior to use.

Once your merchant account has been approved by Wind River, you will receive two emails containing your Username and Password. You will need these when you initially sign into the SwipeSimple application.

Connecting the PAX A920 to WiFi

- Swipe from the top of the screen all the way down to bring up the notifications and settings menu.
- Tap on the word WiFi.
- Select the WiFi at your current location.
- Enter the WiFi password and connect.

Application Login Instructions

- Your PAX A920 will come with the SwipeSimple application pre-loaded. From the home screen, select the app.
- Enter the Username and Password that were emailed to you for your SwipeSimple. Open the app and click on **Log In**.
  - Upon first log in, you may be prompted to change your password.
- Stay Logged In.
  - Enable **Stay Logged In** to bypass entering your login credentials when opening the app. You will remain logged in until you choose to log out.

- Forgot Password
    - Tap **Forgot Password** and enter your email address to receive instructions for creating a new password.


2. App Functions

Account Overview

- Account Overview provides an overview of all transactions from your account within a specified time period. Using the drop down, you can select Today, 7 Days, or 30 Days.

Transaction History

- Transaction History shows details of all transactions for your account.

- To view more details about a specific transaction, simply click on the transaction and then click **Details** in the upper right corner. You can also access the receipt for the transaction from this screen.

Current Batch

- The **Current Batch** menu will show the transaction type and the individual transactions within the current open batch. This also displays the **Batch Closing Time**, as well as a button to close the current batch and deposit the funds.
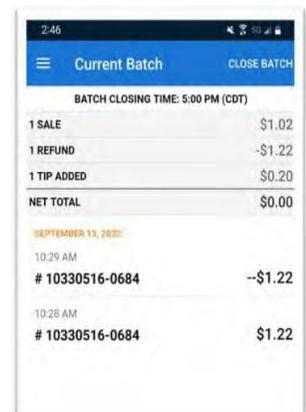
Item Catalog

The Item Catalog menu allows you to manage your categories, items, and discount pricing. We recommend logging in to the SwipeSimple website, to upload your initial inventory list.

Settings – Point of Sale

The following is a list of definitions of the terminology found in the Point of Sale section:

- *Device Management* shows which payment device you're currently connected to.

- *Receipt Printing* sets the number of receipts to print automatically at the end of a transaction.

- *Signature* controls when to prompt for a customer's signature. The options are – Never Prompt, Always Prompt or Prompt, on transactions over $25.00.

- *Save Card* controls the prompt to save a card during transaction. If set to Always prompt, the cardholder will still have the option to skip saving a card.

- *Sales Tax* enables you to collect a defined tax percentage to your transactions. Sales tax can also be controlled on a per item basis.

- *Tip* enables the tip options to be presented to the customer prior to completing their payment. The customer can select from three default tip values or enter a custom tip dollar amount.

- *Offline Mode* enables capturing swiped or keyed payments without an internet connection.
    - Offline mode is not compatible with dip (EMV) or tap (NFC) transactions.
    - You can set a maximum amount for offline transactions when Offline Mode is enabled.
    - Transactions are considered "pending" until connectivity is regained and will automatically process when your device goes back online, and the app is opened.
    - Offline transactions expire 30 days after capture if they are not processed.
    - A maximum of 50 transactions or a total of $3,000 will be saved offline.
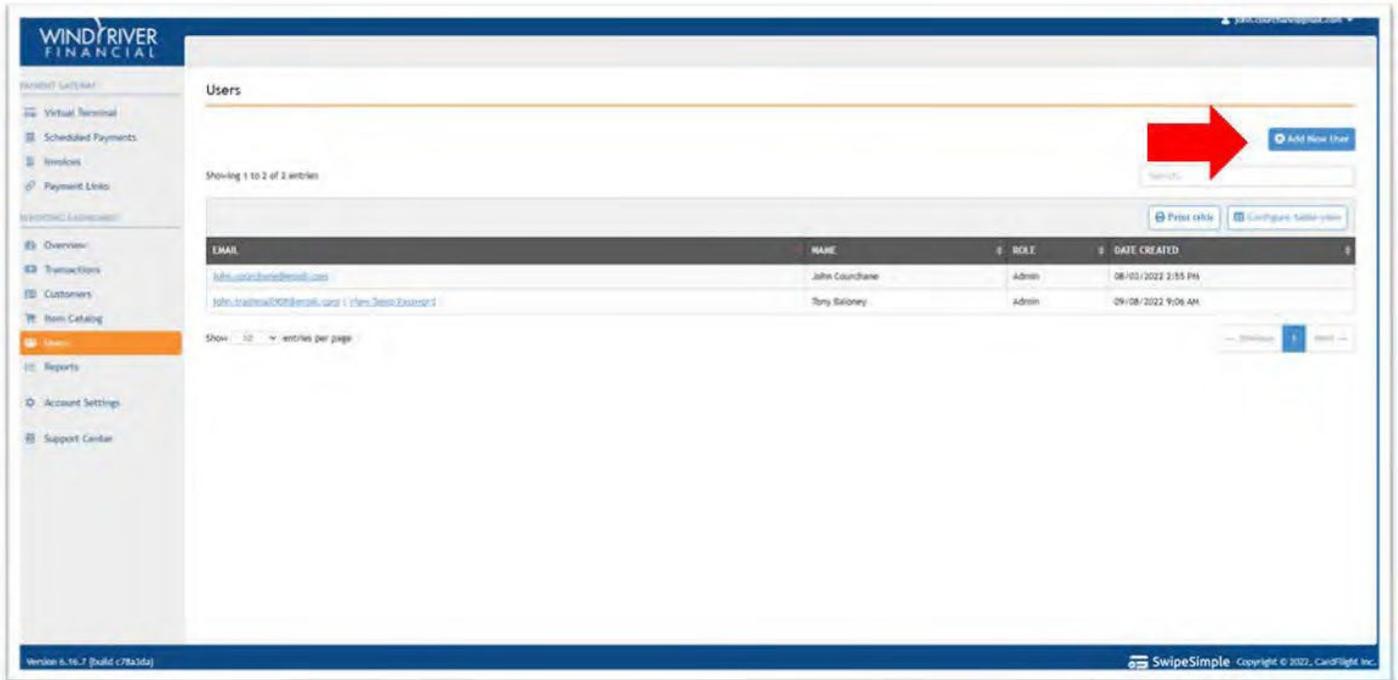
Please Note: Offline transactions carry increased risk as they are not approved or declined until network connectivity is re-established.

3. Adding Additional Users

To add additional users to your SwipeSimple account, log into SwipeSimple.

- Navigate to the Users tab on the left-hand side and click **Add New User** in the upper right-hand corner.

- Enter the new user's email address and full name. Select a Role. Admin users have full access to all transaction data and account functions. Member users can only take and void payments, and do not have visibility to other user's transactions. Member users may not process refunds.

- Click the **Add New User** button to complete the new user set up.

4. Importing Inventory

SwipeSimple uses categories to manage inventory. There is no limit to the number of SKUs per category, and no limit to the number of categories. For instance, if you are a retail clothing store, you may have several categories including Hats, Shirts, Pants, and Accessories. Each of those categories could have multiple SKUs.
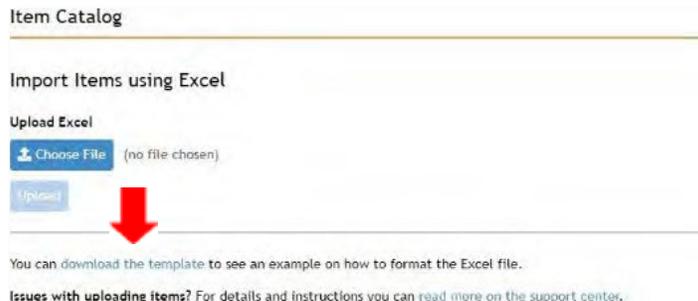
- To set up your Categories and SKUs:
  - On a web browser, navigate to the SwipeSimple website.
  - Enter your Username and Password and click **Sign In**.

- From the Dashboard, select **Item Catalog** on the right-hand side menu. Select **Import Items.**
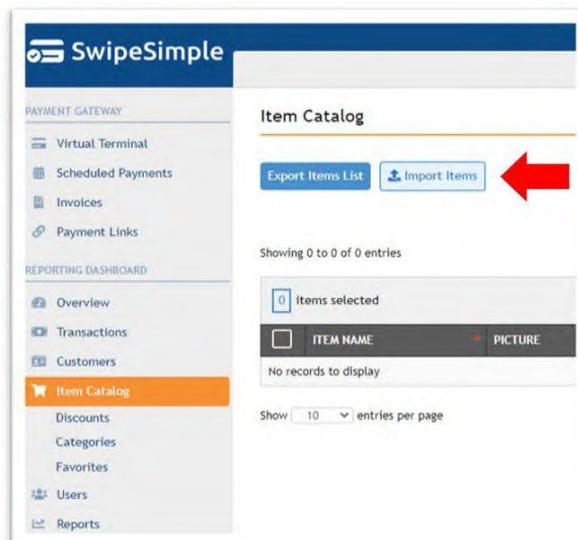
- You can download a template CSV file and configure it for your specific company.

A	B	C	D	E	F	G	H	I
d	name	sku	price	taxable	status	on_hand	track_inventory	category
	Gold Watch	watch-abc123	399.99	TRUE	active	17	TRUE	Accessories
	Boot Cut	pants-def456	59.99	TRUE	active	4	TRUE	Pants
	Buttondown	shirt-789uio	69.99	TRUE	active	55	TRUE	Shirts
	Tee Shirt	shirt-654tyu	19.99	TRUE	active	45	TRUE	Shirts
	Baseball Cap	mil-123mnb	39.99	TRUE	removed	15	TRUE	Hats
	Bucket Hat	Len-sms1999	29.99	FALSE	active	20	FALSE	Hats

- Once you have configured and saved your inventory file, click **Choose File,** navigate to your saved .csv file and click **Upload.**
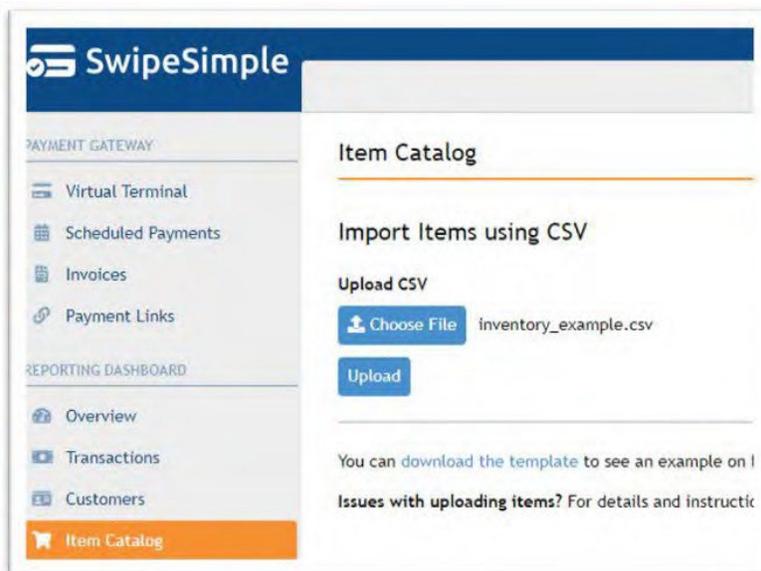
- You will now see your full inventory in the **Item Catalog.**

- To adjust an item (e.g., change the price, add a picture, change the SKU, etc.) simply click on the **Item Name** within the **Item Catalog** and make any adjustment.
- Click **Update** in the upper right-hand corner and you will be redirected back to the **Item Catalog**.

5. Processing a Transaction

Once you're logged into the app, you will see options for *Quick Item, Items*, and *Cart*.

- *Quick Item* is used for running a transaction unrelated to any inventory.

- *Items* allows you to place items into a cart before running the transaction.

- *Cart* displays the items from your inventory that you have added for the transaction.

New Charge

- If using Quick Item, enter the amount of the transaction and click **CHECKOUT**.

- If using Items, select the SKUs, then go to the cart tab and click **CHECKOUT**.

- To add multiple items from your inventory, select the first item, then press the + button to add the item to the cart, and continue adding items until you are ready to check out.
  - Click the **Cart** tab to finish the transaction.
- If tax is automatically applied, you'll see your total plus tax in the upper right-hand corner.
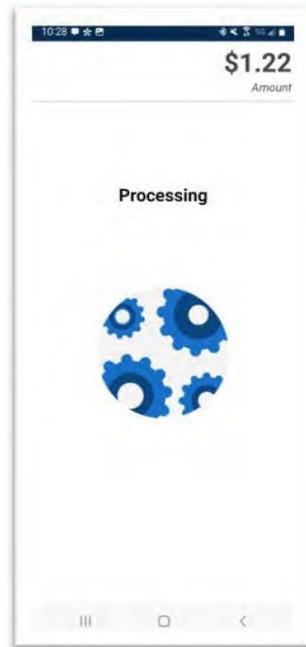

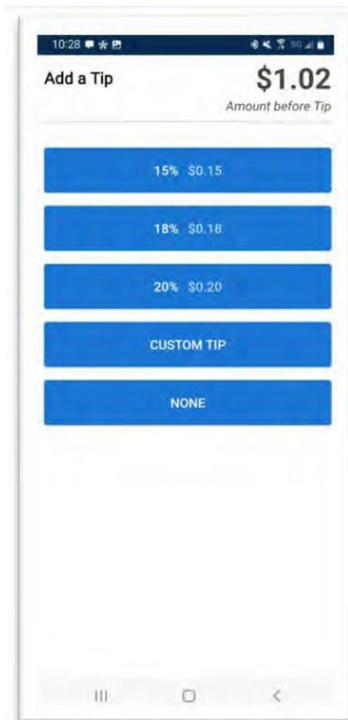- You will be prompted to choose a payment method: card or cash.

- If **Card** is selected, you will be prompted to **Swipe**, **Dip** or **Tap**.
- It may take a couple of seconds for your card reader to connect to the app.
- You also have the option to save the card information for recurring payments or installments.
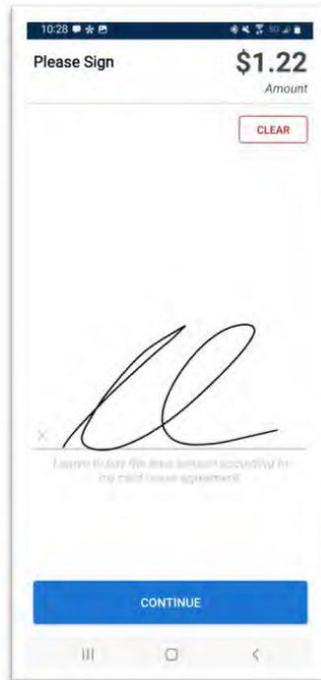
- You will then see a screen that says **Processing.**

- If you have tips enabled, you will see a prompt to add either a set percentage, custom or no tip.

- If you require a signature, the customer will be prompted to sign the device's screen.

You will now see either an **Approved** or **Declined** screen. If the card is declined, request a new payment method and re-run the transaction or reach out to your Wind River Relationship Manager for more specific information pertaining to the decline reason.
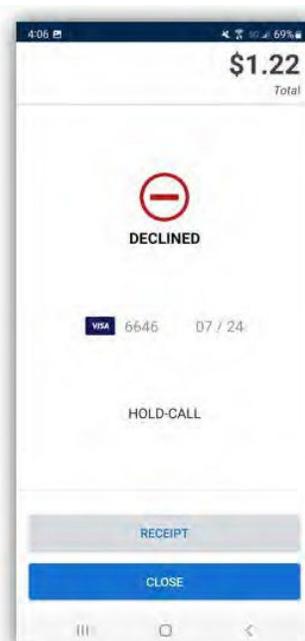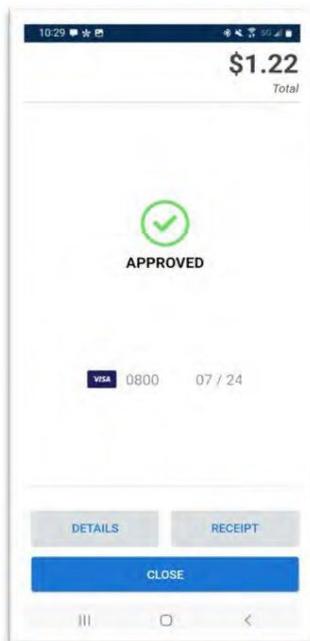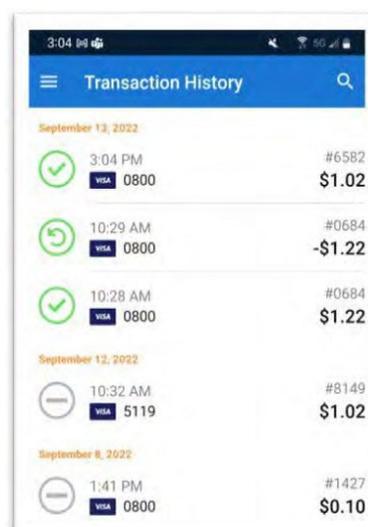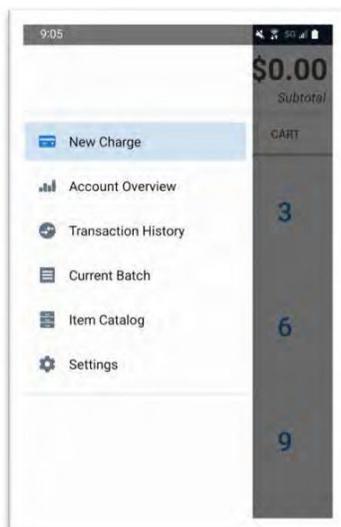
This will transition to a screen showing additional transactional information. From here, you can void the transaction, process a refund, or issue a receipt.
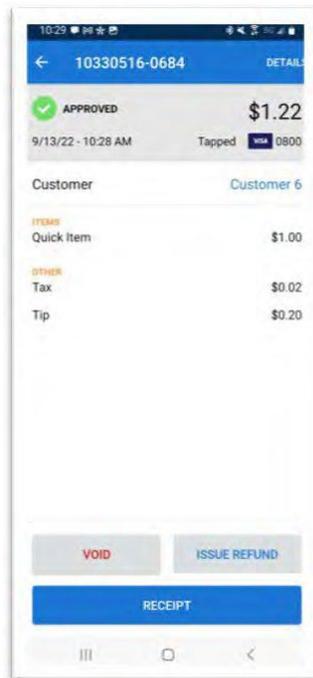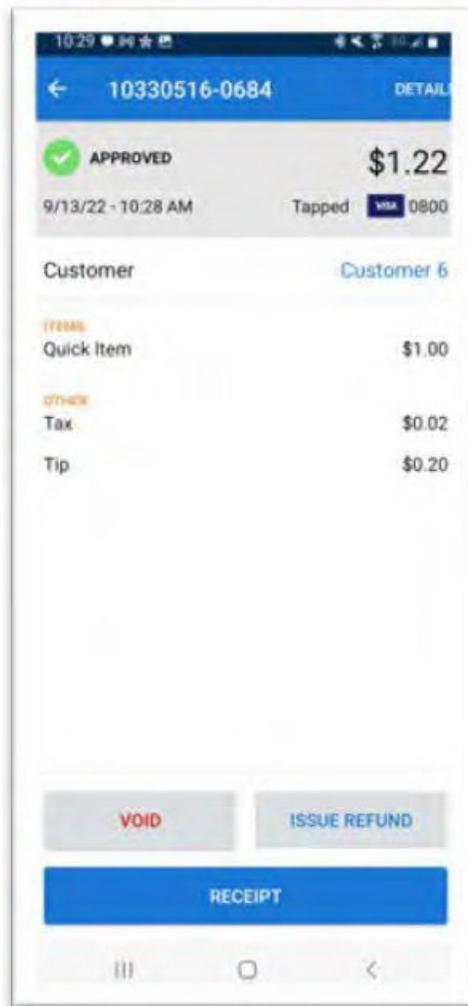

6. Processing a Void or Refund

To run a Void or Refund, click the three action lines in the upper left-hand corner.

- Select **Transaction History** to pull up a list of all of your previous transactions.

- Click on the transaction you wish to reverse to open the information page.
- From here, you can click **Void** if the transaction has not settled, or **Issue Refund** to issue the refund.

7. How to Customize Your Receipt

Click on the **Receipts** tab under **Account Settings** on the left- hand side of the screen.

Set or modify **Digital Receipt** details including:

- Add or remove an image/logo
- Include a header background color
- Choose to display the Merchant Account name
- Choose to display Street Address and Zip Code
- Choose to display the Reference Number
- Header
- Footer
- Set email recipient for every transaction
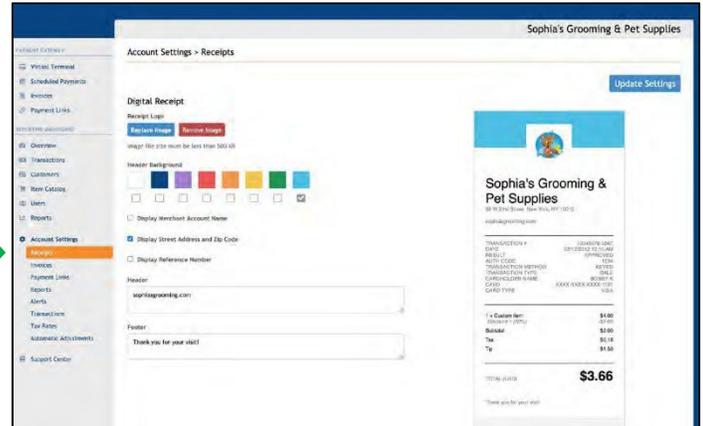
The digital receipt preview is automatically updated as changes are made.

To customize **Paper Receipts**, scroll to the bottom of the Receipts page to set or modify details including:

- Header
- Footer
- Default number of paper receipts to be printed after each transaction – select between 0,1 or 2 copies from the Default Count dropdown.

For additional support, please visit the SwipeSimple Support Center or contact your Wind River Relationship Manager.