

QUICK REFERENCE GUIDE – iPad®

# Chase Mobile Checkout

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## OVERVIEW

Chase Mobile Checkout (CMC) is a mobile point of sale solution that helps business owners increase their sales by allowing them to process credit, signature debit and select, third-party gift card transactions on a mobile device. In order to use the solution, you need our proprietary mobile app downloaded to your compatible device, a signed merchant agreement and a Chase-issued card reader.

## FEATURES

- Point-to-point encryption for processing and password protection.
- All major credit cards accepted (including EMV chip and magnetic stripe credit), plus signature debit and select third-party gift cards.
- Mobile access to your Chase Merchant Services account.
- Bluetooth® Smart (BLE) card reader.

## FUNCTIONS

- Manually add a per-order discount to accommodate special promotions or employee pricing.
- Send digital receipts to your customers via email or text message.
- Search for specific transactions, create reports, process voids and refunds – all from your mobile device.

## SUPPORTED PLATFORMS AND DEVICES

Minimum compatibility requirements to use Chase Mobile Checkout with the eDynamo card reader:

- iPad® using iOS 9.0
- Bluetooth Low Energy 4.0

## GET ADDITIONAL ASSISTANCE

For additional support, please visit us at [chase.com/MerchantServices](https://chase.com/MerchantServices) or call 1-866-428-4967.

## GETTING STARTED

Follow these steps to get started with Chase Mobile Checkout:

### 1. SET UP YOUR ACCOUNT:

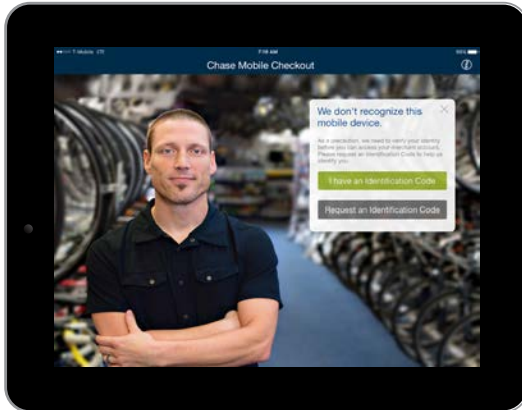
All clients are required to complete a detailed application, and agree to terms and conditions, at the time of enrollment. All clients are subject to credit approval. Contact us to establish a merchant account.

Once approved, you will receive two emails: one with your username and one with your temporary password. Download the Chase Mobile Checkout app from the Apple® App Store<sup>SM</sup>.

### 2. ACTIVATE YOUR ACCOUNT:

When you launch the application for the first time, you will need to accept the End User License Agreement (EULA). You will need to allow CMC to access location services for transaction purposes.

- Log on with your username and temporary password. We will send the username and password in two separate emails.
- You will be prompted to create a new password.
- Next, since this is the first time you have logged on from this device, you will be prompted to receive an identification code via your mobile phone or email address on file. Enter the identification code and password on the log-on screen and tap **Log On**.



### 3. PAIR YOUR READER:

Once you receive the credit card reader from us:

- Charge the reader for three hours using the USB charging cable.
- Pair the reader with your mobile device.

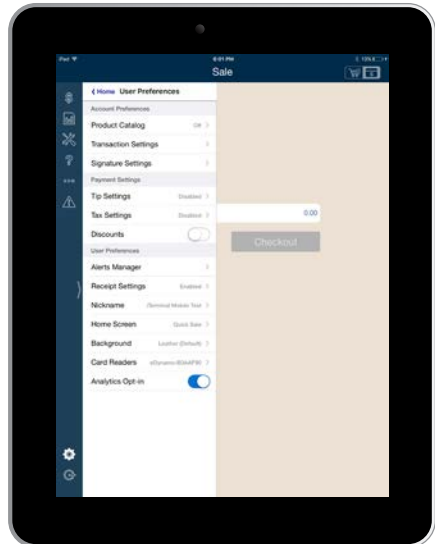
## PAIRING YOUR MOBILE DEVICE

Minimum compatibility requirements to use Chase Mobile Checkout with the eDynamo are an iPad® using iOS 9.0 and Bluetooth® 4.0. The card reader comes with a USB cable, which should be plugged in to both the reader and a power source (such as a computer) to charge the battery. The card reader's battery requires approximately three hours to fully charge.

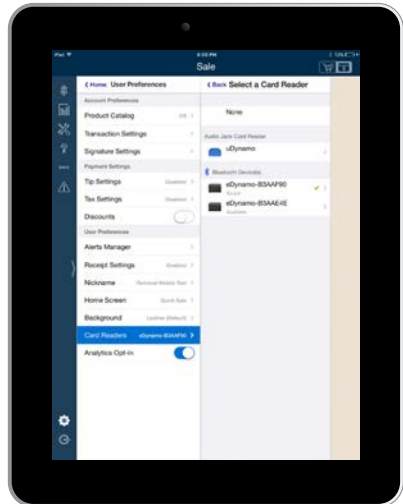
The General Status LED light will blink green while charging, and then switch to solid green when complete. Use the USB cable to recharge your card reader as needed.

### TO PAIR YOUR DEVICE:

1. Make sure your iPad has Bluetooth enabled in its **Settings** area.
2. Once you're logged on to the Chase Mobile Checkout app, tap the **User Preferences (Gear icon)**.
3. At the bottom of the **User Preferences** screen, tap **Card Readers**.
4. Locate the **Pushbutton** on the side of the eDynamo card reader. Once you begin the pairing process, you'll have about three minutes to get your device paired successfully, or you'll have to start over again.
5. Press and hold the Pushbutton for two seconds. If the Pushbutton is held too long (five to 10 seconds), the eDynamo will enter Airplane mode. Momentarily hold the Pushbutton again to remove it from Airplane mode.
6. The Bluetooth Status LED will be a steady blue, and will quickly blink three times. Release the Pushbutton. The eDynamo is now in pairing mode.
7. On the bottom of the eDynamo card reader, look for the serial number. It starts with S/N.
8. Select this same serial number from the list of devices in your Chase Mobile Checkout app. You may need to refresh your screen to display the reader list.



9. Inside the **Bluetooth Pairing Request** window, enter the default pairing code of six nines (9 9 9 9 9 9) and tap **Pair**.
10. Once the status changes to **Connected** beneath the reader name, toggle on the **Set As Current Device** switch.
11. Tap the **Back** button.
12. In the list of readers, you'll see a green check mark next to the reader. The iPad is now paired with the eDynamo card reader.



## UNDERSTANDING YOUR ACCOUNT CREDENTIALS

As a Chase Mobile Checkout user, you may have access to other Chase Online tools. If so, you'll receive emails for Online POS Terminal (OPT), Paymentech Online (PTO) or Resource Online (ROL) that provide more information about those solutions and how to access them.

User access to each is determined by your merchant account administrator. Your log-on credentials should be identical for all your user accounts.

- OPT allows you to use a computer to process payments through a browser-based application, using a supported PIN pad.
- Our online financial management tools, PTO and ROL, let you use your computer to access payment processing data and reports via a web browser. These tools work in conjunction with other Chase solutions so that all your transactions, statements and reports are in one place. Some small business users also get access to the Instant Dashboard; immediately view your daily sales and settlement figures with your electronic statement only a click away.

## CONFIGURING USER PREFERENCES

Chase Mobile Checkout's User Preferences offers you several options to customize your processing experience.

- Build or edit your product catalog.
- Customize your transaction settings including adding reference numbers to your transactions, enabling card verification value (CVV), prompts and creating address verification service (AVS) options.
- Enable the signature prompt during transactions from an EMV-enabled reader.
- Set up customized tip percentages and tax rates.
- Enable the option to calculate discounts for your customers.
- Set threshold alerts for when transaction volumes are surpassed or transaction types occur.
- Enable your business to receive an electronic receipt via email or text.
- Set or change your business name.
- Establish a pairing relationship for up to nine Bluetooth® card readers.
- Opt in or opt out of analytics participation.

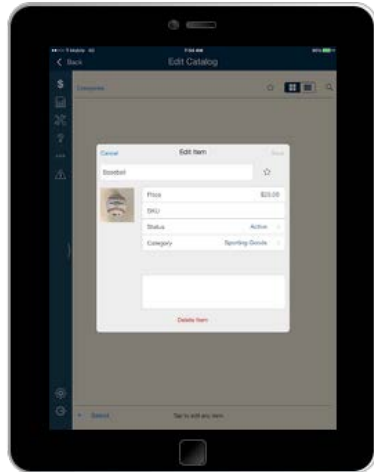
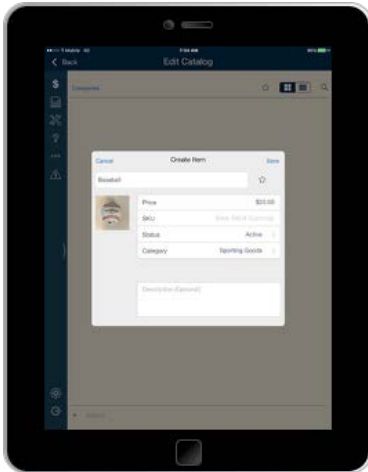


## MANAGE YOUR PRODUCT CATALOG

Users can create a catalog of products to be stored on their iPad®. The limit to the number of items in the catalog is the iPad's available storage.

1. Within **User Preferences (Gear icon)**, tap **Product Catalog** and toggle on **Product Catalog** to enable it.
2. Tap **Edit Product Catalog** to view/edit the items.
3. Create an item by selecting the “+” button at the bottom of the screen.
  - a. Enter the **Item Name**.
  - b. Tap the **Star** icon to make it a favorite.
  - c. Set the item's **Price**, **SKU** (optional) and **Status**.
  - d. If desired, enter a **Category**, add a product **Description** and a default **Tax** amount for the item.
4. Also, users can tap the **Add Photo (Camera icon)** box to activate the iPad's camera to take a picture of the item or use the device's photo library.
5. When complete, tap **Save** to store the item in your catalog.

**NOTE:** The product catalog is not stored by Chase, and only exists on the mobile device for which it was built. If CMC is uninstalled from the device, the product catalog will be deleted.



## CONFIGURING YOUR RECEIPT

CMC users can now benefit from an added opportunity to market their business. Via the OPT interface, you can upload a logo to further customize the receipts you email to your customers.

1. Create a bookmarked link to the Online POS Terminal using: [chase.com/OnlinePosTerminal](https://chase.com/OnlinePosTerminal) and use your CMC credentials to log on
2. Access OPT's **Administration** page, and select **Receipts**
3. Browse to upload your logo
  - a. The logo must be PNG format, be no larger than 75px high x 350px wide and must not exceed 80 KB
  - b. An error message will display if the logo uploaded doesn't meet these requirements
4. The **Enable display of the receipt image on the receipt button** will default to Yes once logo is inserted
5. The receipt's **Header** and **Footer** fields can be edited independent of the logo feature
6. Click **Update** to confirm change

The screenshot shows the 'Administration' page for 'Receipts' in the Chase J.P. Morgan Online POS Terminal. The page is titled 'Administration' and includes a navigation menu with options like 'New Transaction', 'Transaction Management', 'Reporting', and 'Quick Batch View'. The main content area is divided into sections: 'General', 'Transactions', 'Receipts', 'Settlement', and 'Device Management'. The 'Receipts' section is active and contains the following fields:

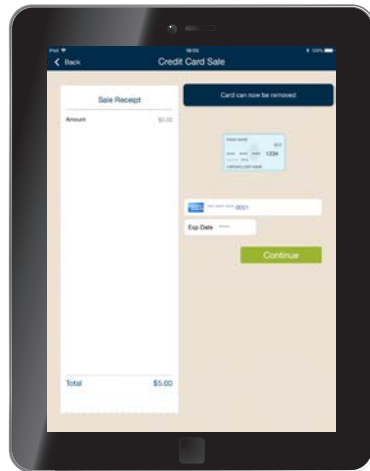
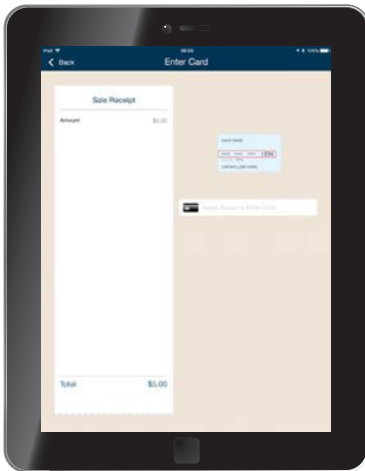
- Receipt Image:** A section for uploading a logo. It includes a text input field for 'Image File' containing 'KCC.png', a 'Browse' button, and a 'Delete' button. Below this is a preview of the logo for 'KC CAFE'.
- Enable display of the image on the receipt:** A radio button selection with 'Yes' selected and 'No' unselected.
- Header:** A section for entering text to appear on the header of receipts. It includes a note: 'Type the text you want to appear on the header of your receipts. Each line can accept up to 40 characters. Required Data - Merchant name, address and phone number.' Below this are six input fields labeled 'Line 1' through 'Line 6'.
- Footer:** A section for entering text to appear on the footer of receipts. It includes a note: 'Type the text you want to appear on the footer of your receipts. Each line can accept up to 40 characters.' Below this are four input fields labeled 'Line 1' through 'Line 4'.

At the bottom of the form is an 'Update' button.

## PROCESSING A TRANSACTION

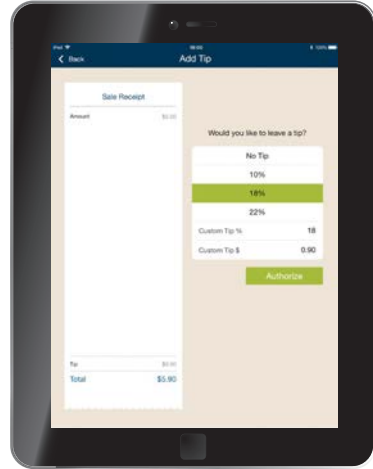
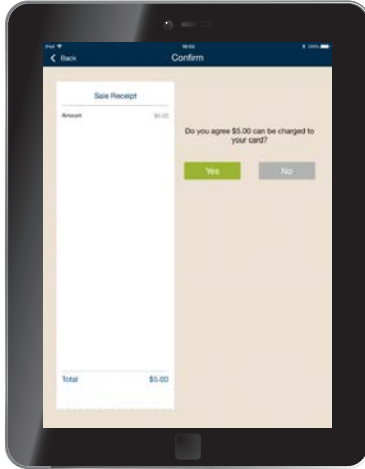
Chase Mobile Checkout allows you to accept payments on the go, virtually anywhere your business takes you.

1. Tap **Sale** under **Payments** (\$ icon) on the left side navigation.
2. If activated, add items from the **Product Catalog** (Shopping Cart icon) or enter the amount of the sale.
3. Tap **Done** to close the keypad, then tap **Checkout**. The eDynamo's General Status LED will light green indicating the need for the customer to insert or swipe their card.
  - a. If making an EMV/chip card sale, the card should be left inserted momentarily. The application will prompt the user when it is appropriate to remove the card.
  - b. If swiping the card, remember to swipe slowly and firmly with the magnetic stripe down.
  - c. If manually entering the card, touch the card entry field to bring up the keypad.

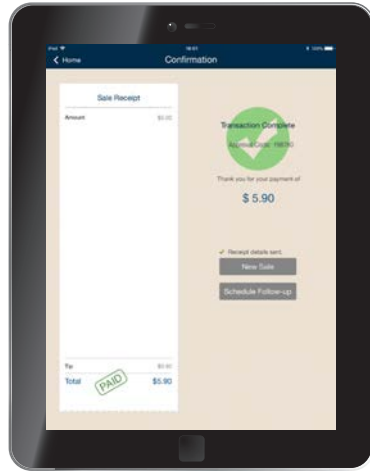
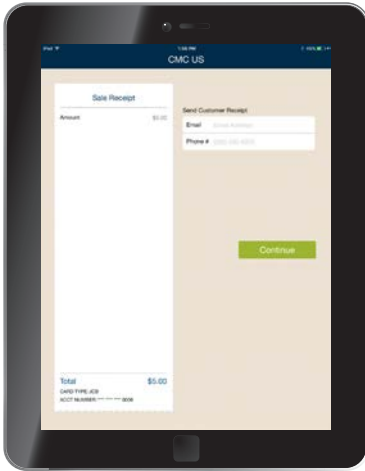


4. The card information will be recognized and will populate the card fields on the iPad. Manually enter other fields determined in **User Preferences**.
  - a. *If tip processing is enabled:*

- I. Tap **Continue**.
- II. Present the iPad to the customer to confirm the sale amount.
- III. Once the amount is confirmed, an **Add Tip** field will display.
- IV. The customer can select a predefined tip percentage or key in a custom amount and tap **Authorize**.



- b. *If tip processing is disabled:*
  - I. Tap **Authorize**.
  - II. If **Signature Settings** is enabled in **User Preferences**, the customer should use their finger or stylus to sign and then tap **Continue**.
5. When the customer has completed signing, they can enter their email address or mobile phone number for the digital receipt, and tap **Continue**.
6. Once the transaction is authorized, a confirmation screen will appear.



7. Tap **Home** or **New Sale**.
8. Tap **OK**.
9. Tap **Home** or **New Sale** again to return to the **Payments** home screen to continue processing additional transactions.

**NOTE: CARD SWIPING** – If swiping the card, remember you can swipe in any direction, though the magnetic stripe should be in direct contact with the silver tab inside the reader.

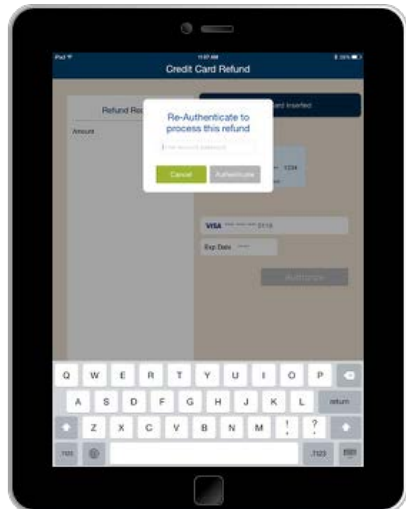
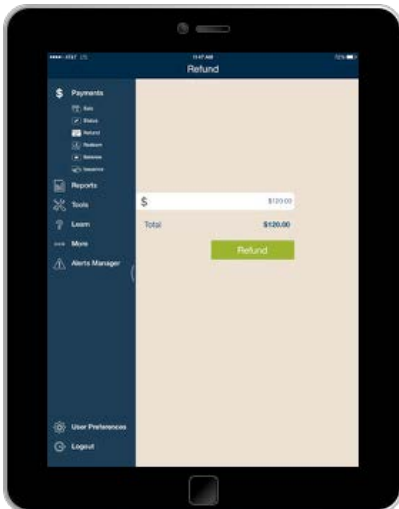
## PROCESSING A REFUND OR VOID

There are two ways to process a refund in Chase Mobile Checkout.

### TO PROCESS THE REFUND FROM THE PAYMENTS HOME SCREEN\*:

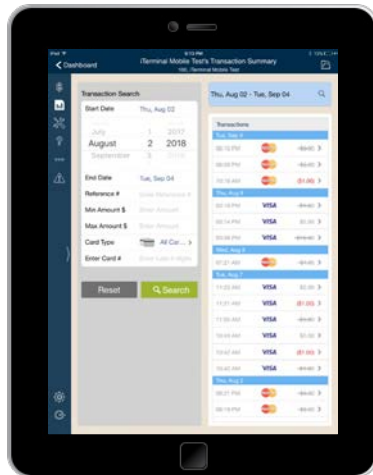
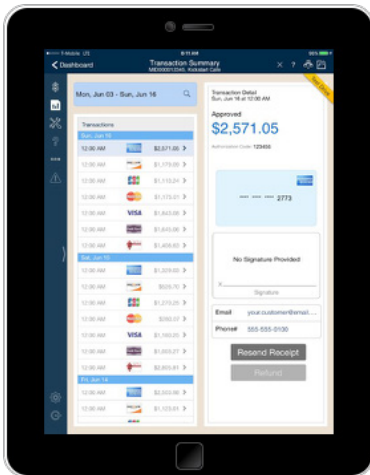
1. Tap the arrow on the left-hand navigation, then tap **Refund** under **Payments** (\$ icon).
2. Input refund amount, tap **Done** and **Refund**.
3. Insert, swipe or enter the card information. If manually entering the card, touch the card entry field to bring up the keypad on the iPad®.
4. Enter the reference number if required, and tap **Authorize**.
5. If **Signature Settings** is enabled in **User Preferences**, present the iPad to the customer. The customer can use a stylus or their finger to sign for the refund.
6. After the customer has given you back the iPad, tap **Continue**.
7. Once the transaction is complete, a confirmation screen appears.
8. Tap **Home** or **New Sale**. You will see a prompt to remove the inserted card. Tap **OK** and remove the card. Tap **Home** or **New Sale** again to return to the **Payments** home screen to continue processing additional transactions.

\*For refund transactions, users will need to re-enter their password for sessions lasting longer than 15 minutes.



**TO PROCESS THE VOID OR REFUND FROM THE TRANSACTION SUMMARY SCREEN:**

1. Tap the arrow on the left-hand navigation, then tap **Transaction Summary** under **Reports** (**Graph** icon).
2. Locate the transaction in the listing, and tap to select. You may also tap the **Magnifying Glass** icon and select a date range to find the transaction.
3. Scroll on the right-hand side of this screen, and tap to either **Void** or **Refund** the transaction.
  - a. If the transaction has not been submitted for settlement, and is still in your open batch, the **Refund** option will be a **Void** option instead.
  - b. If you select **Void**, a confirmation box will appear, tap **Yes**.
4. When you select **Refund** an **Enter Refund Amount** box appears. You can edit the amount showing or just tap **Refund**.
5. Present the iPad to the customer. The customer can use a stylus or their finger to sign for the refund. The customer can enter their email address or mobile phone number to send a digital receipt of the refund.



6. After the customer has given you back the iPad, tap **Continue**.
7. Once the transaction is complete, a confirmation message appears.
8. Tap **Home** or **New Sale** again to return to the **Payments** home screen to continue processing additional transactions.

## VIEWING TRANSACTION REPORTS

Chase Mobile Checkout allows you to review your account details on your iPad®. These details are accessed through various transaction reports.

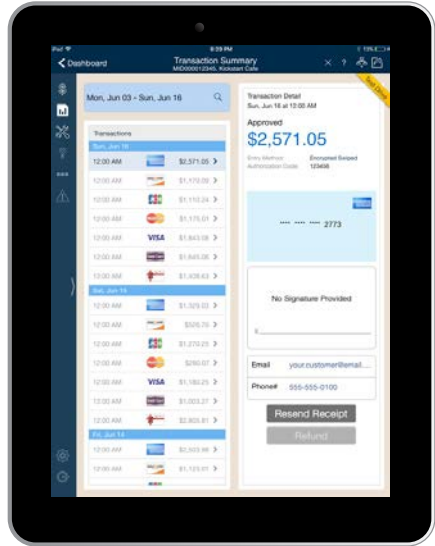
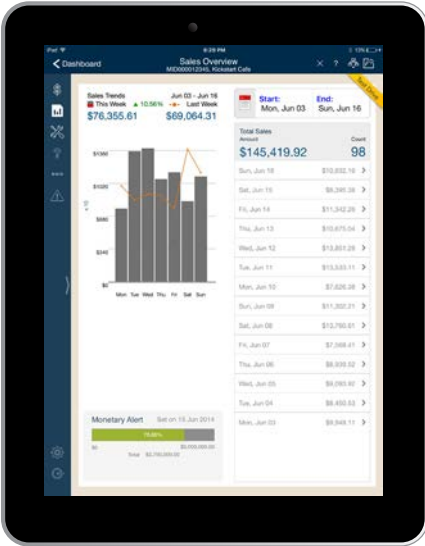
The **Transaction Summary** screen shows transaction details for both current and historical transaction data.

- Tap the arrow on the left hand navigation, then tap **Reports (Graph icon)**, then tap **Transaction Summary**.
- The current transactions in your open batch are listed with the most recent transaction at the top.
- You can search historical transactions by tapping the **Magnifying Glass** icon, then selecting a start date and end date.
- Tap the **Search** button to view the results.
- You can select a specific transaction by tapping it in the listing.

The **Sales Overview** screen offers a glance into a day-to-day sales summary.

- From the home screen, tap **Reports (Graph icon)** then **Sales Overview**.
- The current sales for the specified time period are listed with the most recent transaction at the top. You can see historical sales per day by tapping the **Calendar** icon and selecting a start and end date, and then tapping **Done**.
- You can select a specific sale by tapping it in the listing.
- You can view the information in a graph that is scrollable horizontally.
- Tapping on a specific data point will overlay the sales amount for that day.
- There is also a box for **Sales Goal** that can be configured in **User Preferences**.





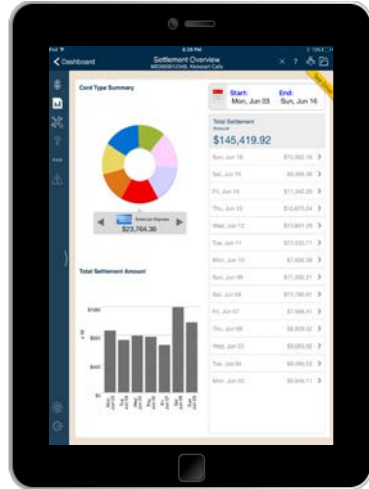
## VIEWING SETTLEMENT REPORTS

Chase Mobile Checkout allows you to review various summaries of your account. These reports can help you understand the overall activity of your account by keeping track of all batches in your Merchant Services account.

A settlement operation is used to close out the current batch of transactions and open a new batch. You don't need to settle your batch manually; Chase Mobile Checkout automatically settles for you at 11:30 p.m. EST every day.

You can access these reports from under **Reports (Graph icon)** on the left-side navigation home screen, and then tapping the applicable report.

- The **Settlement Overview** provides deposit information for the last week with a grand total at the top as the default view. To change the date range, tap the **Calendar** icon and select a start and end date, and then tap **Done**.
- The **Funding Overview** provides actual funded data based on deposits from Chase on behalf of the merchant.
  - Selecting a date reveals the fees by card type, non-bankcard, authorizations and other fees broken down.
  - To change the date range, tap the **Calendar** icon and select a start and end date, and then tap **Done**.
- The **Fees Overview** will show all fees summarized by date for the last week as the default.
  - Selecting a date reveals the fees by card type, non-bankcard, authorizations and other fees broken down.
  - To change the date range, tap the **Calendar** icon.
- The **Chargeback Summary** gives individual chargeback listings. Change the date range by tapping the **Calendar** icon, selecting a start and end date, and then tapping **Done**.



NOTE: PERMISSIONS – To request changes to user access, your merchant account administrator must call us for support, using the telephone number located in the **Contact Us** panel.



## USING THE eDYNAMO CARD READER

Minimum compatibility requirements to use Chase Mobile Checkout with the eDynamo are an iPad® using iOS 9.0 and Bluetooth® 4.0.

These two tables will assist you in understanding the status of the reader based on two indicator lights.

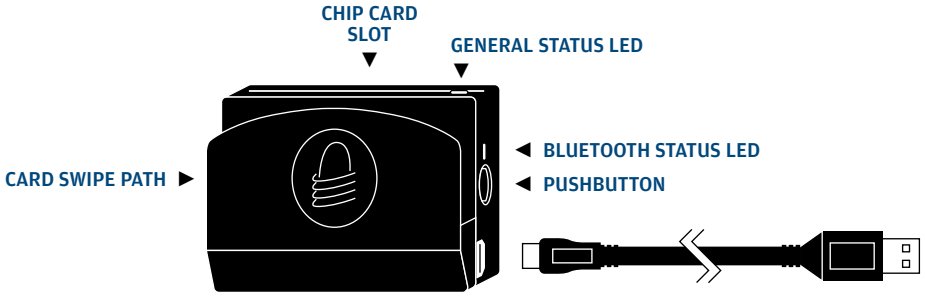
- The General Status LED tells you the general status of the battery and transaction.
- The Bluetooth Status LED tells you the status of the Bluetooth connectivity.

### GENERAL STATUS LED

COLOR	FLASHING PATTERN	MEANING
Green	Slow Blinking	When plugged in, indicates the device is charging.
Green	Solid On	When plugged in, indicates the device is fully charged.
Green	Solid On	During transaction, it indicates the device is ready for card entry.
Red	One Second Flash	During a transaction, it indicates the reader has failed to decode data on a card. Try the swipe or insert again.
Red	Rapid Flashing	During a transaction and when operating on battery power, it indicates a card has just been swiped or inserted but the battery must be recharged.

### BLUETOOTH STATUS LED

COLOR	FLASHING PATTERN	MEANING
Blue	Solid On	When the Pushbutton is quickly pressed, it indicates that the reader is functioning. Do not hold the button for too long (5 to 10 seconds) or the reader will be placed in Airplane mode. To restore it, quickly tap the Pushbutton. Refer to the <b>Pairing Your Mobile Device</b> section for more information.



**NOTE:** The Bluetooth Status LED indicates key steps in pairing with a mobile device. For a full description of the pairing process, see page 6.

## TROUBLESHOOTING

Minimum compatibility requirements to use Chase Mobile Checkout with the eDynamo are an iPad® using iOS 9.0 and Bluetooth® 4.0.

### **I cannot log on to the application.**

Ensure that you:

- have signed a merchant agreement with Chase
- have a mobile account
- are connected to the Internet
- have an active username and password\*

\*Your username and password were emailed separately when your account was first activated. The password email contains a one-time use password that will require a reset when you log on for the first time.

### **My password isn't working.**

Ensure you:

- are spelling it correctly
- enter the case correctly

\*You can reset your password by tapping **Forgot Password** on the home screen.

### **I cannot process transactions.**

Ensure:

- you are connected to the Internet
- the reader hasn't been placed in Airplane mode (quickly tap the Pushbutton to restore it)
- you are in the United States and not close to a border
- your GPS and location services features are not disabled

### **The eDynamo chip card reader doesn't seem to be working.**

The reader can be used by only a single mobile device at a time to perform a transaction. No more than nine mobile devices can be paired to a single reader. If a tenth device is paired, then the first device will be unpaired.

You also may want to ensure:

- the reader is fully charged
- the mobile device's Bluetooth is enabled

- you've paired the mobile device using the one-time pairing code of six nines (9 9 9 9 9 9) (refer to the **Pairing Your Mobile Device** section for more information) and the reader is set as default reader
- the reader hasn't been placed in Airplane mode (quickly tap the Pushbutton to restore it)

If you still cannot process transactions, try turning off your mobile device and starting over.

## SETTING UP USERS

Individual user profiles can be configured in ways that only grant them access to portions of Chase Mobile Checkout.

- To request the setup of additional users, please call Chase Mobile Checkout Support at 1-866-428-4967.
- To ensure the security of your sensitive data, this can only be completed by the account contact Chase Merchant Services has on record.



## FREQUENTLY ASKED QUESTIONS (FAQs)

Please review these commonly asked questions about Chase Mobile Checkout (CMC).

**What mobile devices can I use with Chase Mobile Checkout?** iPad® minimum compatibility requirements for CMC is iOS 9.0. If a business owner wants to use our new chip card reader, the mobile device must be at least Bluetooth® 4.0 capable.

**Why am I asked to change my password every 90 days?** With the guidance from the Payment Card Industry Data Security Standard (PCI-DSS), Chase asks users to change their password every 90 days. Frequent password renewal decreases the chances for malicious individuals to gain access to your sensitive data.

**How do I know my password is about to expire?** During login, the application will notify you when you are five days away from your password's expiration date and again a day before your password expires. Tapping this notification will take you through the password reset process. You can skip these notifications until the password finally expires. The password can be changed at any time from the "Forgot your password?" link on the login screen.

**How do I locate my log on credentials?** Once you've signed a merchant agreement with Chase and your account is established, you'll receive two separate emails from us containing your username and your password. The password email contains a one-time use password that will require a reset when you log on for the first time. See the Getting Started section for more information.

**Can I use an external application to store my account credentials?** Utilizing the secure credential storage systems built by some third-party password managers, you can now paste your account credentials directly into CMC's login page. However, we still recommend that you take the necessary security precautions in protecting your account credentials and never leave them in a publicly accessible place.

**Can I share log on credentials among my employees?** While mobile devices and card readers can be shared by your employees, each user should have their own user credentials tied to their own email address.

**Can I log on to my Chase Mobile Checkout account from multiple mobile devices?** Yes, but you may need to complete the device authentication process whenever you access CMC from a new mobile device for the first time.

**Will my current log on credentials work each time a new version of CMC is released?** Yes. We frequently issue new versions to ensure the application is up to date with security and feature enhancements. Simply visit the Apple® App Store<sup>SM</sup> and download the new version to receive the latest updates.

**Will my current log on credentials ever expire?** Please keep your CMC credentials active by logging on at least every 90 days. Otherwise, we protect your mobile account by locking the credentials and requiring the password to be reset.

**How do I get a card reader?** Contact the Chase Mobile Checkout Support team at 1-866-428-4967 to request a card reader.

**I already have a blue reader but I've heard about a new chip card reader. Will my blue reader still work with the application?** Your blue reader (uDynamo) will still work with CMC, but it will only process magnetic stripe transactions. We encourage users to upgrade to our new EMV-compliant reader (eDynamo) so you can offer your customers a more secure chip card transaction.

**What does it mean that CMC now has an improved chip card transaction?** Chase has reduced the time a chip card remains inserted for EMV transactions. Cardholders will be instructed to insert their card and, within seconds, the application will prompt them to remove their card.

**Why am I no longer prompting for a signature during transactions?** Starting in April 2018, the payment brands have made signature capture for transactions optional for all EMV-enabled terminals. Now, when using our eDynamo card reader the signature is no longer required for EMV/Chip or magnetic stripe based transactions. We did make this an option for you, however, so you can enable the signature capture in the User Preferences under the option for Signature Settings.

**What are AVS settings and how do I enable them?** Address Verification Service (AVS) is a service provided by the payment brands that determines the match or partial match of the consumer's address information. The responses are returned to you during the authorization process via your transaction processing software/hardware, and can help determine your next action: approval, exception or decline. CMC allows users to modify them by visiting User Preferences, then Transaction Settings.

**How does the application allow me to set unique tip and tax settings?** Users can enable CMC to prompt for a tip during each transaction. This setting can even be customized to allow your customers to select from up to three suggested tip amounts. Users can also enable unique tax settings per product or on the entire purchase amount.

**Does Chase Mobile Checkout allow me to accept transactions outside of the U.S.?** Chase Mobile Checkout can only be used by U.S. and Canadian merchants. The application you are using currently is only available for U.S.-based businesses. There is a separate application that can only be downloaded by businesses located in Canada.

**Can I add my business logo to my receipts?** Yes, your CMC account credentials will also supply you access to Online POS Terminal (OPT). There, you can customize the receipts emailed to your customers, including the addition of your business logo. Uploaded logos can be no larger than 75px high x 350px wide and must not exceed a file size of 80 KB.

**Do I have to have a network connection to process transactions?** Yes. You will need to have access to a cellular or Wi-Fi® network to process transactions. Additionally, location services must be enabled on your mobile device to process transactions.

**Why do I see the notification “Card Reader Not Responding”?** Once a card reader is selected in the User Preferences, the application will expect it to be on and available during the transaction process. This notification is displayed if the application is unable to communicate with the card reader for any reason. Reasons may include lost data connection or power. If you find that communications do not recover, see the Troubleshooting section (The eDynamo chip card reader doesn't seem to be working) for more options.

**Can I use my Chase Mobile Checkout card reader with Online POS Terminal?** No. The CMC card reader is only for use with a mobile device. You cannot use it with a computer-based credit card processing application. Contact us at 1-866-428-4967 to discuss purchasing a separate reader for Online POS Terminal (OPT) or receipt printer for your computer.