ROAM™
POWERING MCOMMERCE

ROAMpay™ X

USER'S GUIDE

Last Modified: 12/06/2012

Contents

Welcome to ROAMpay X powered by ROAM! Now with an improved user interface and workflow, it is sure to deliver fast and easy payment processing from your mobile phone, anytime, anywhere.

ROAMpay X is an application for merchants who want to have the ability to manage their account and take payments via their compatible mobile phone.

If you have any questions about your mobile phone compatibility or how to find a phone model please visit devices.roamdata.com, or call support at 888-589-5885.

Activating ROAMpay X

To activate full service, please follow the steps below:

1 Upon signup, you'll receive an activation email which contains a username and temporary password. Follow the instructions in the email to activate your myROAM (my.roamdata.com) account.

2 To use ROAMpay X, you must first log into your myROAM account, and:

- Accept ROAM Data's Terms and Conditions
- Change your password
- Accept the recurring payment method provided

3 Download the ROAMpay X application from your phone's Market/App Store.

NOTE: Until these steps are completed, you cannot use ROAMpay X on your mobile device or PC/Mac Virtual Terminal.

If you experience any issues with the download or login, please contact your reseller.

Introduction

ROAMpay X turns your mobile phone into a payment terminal to accept credit and debit card payment transactions. (PIN debit transactions are not allowed.)

The application also allows users to both void and refund transactions.

To accommodate users who may not always have connectivity on their device, the application can run in "online" or "offline" modes. While in offline mode, credit and cash payment information is stored securely on the device and will be uploaded later to the payment server. The user assumes the risk of a credit card decline while operating in offline mode.

The ROAMpay X application has 7 major functions:

1. Credit Sale
2. Cash Sale
3. Void
4. Refund
5. History
6. Offline Sale
7. Settings

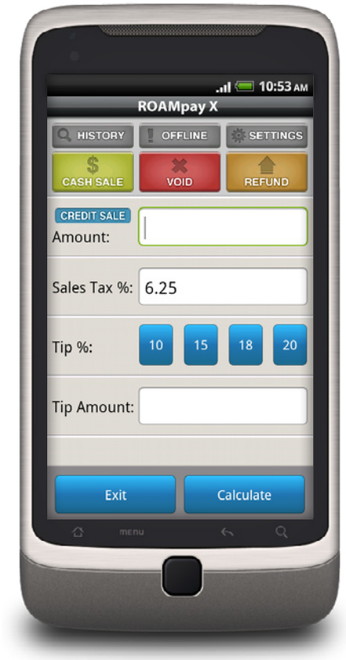


Figure 1

Purpose

This User Guide describes how to use the ROAMpay X application. It provides information and details on the functionality, and simple steps to use each function of the ROAMpay X application, and the Virtual Terminal (Desktop/Notebook version).

NOTE: Illustrations depict the application as shown on a mobile device (Figure 1) and Virtual Terminal. Different devices may display the content differently.

Key Features

- **Process all major credit and debit cards**
  ROAMpay X enables you to accept every major credit card with your mobile phone. This includes MasterCard, VISA, American Express, and Discover.
- **Process and record transactions such as voids and refunds for credit and cash transactions**
- **Set Tax rate for auto calculations to the total**
- **Accept tips (gratuity)**
- **Record cash and card transactions**
  All transactions are recorded and can be exported for better management and organization.
- **Record customer contact details and build up customer base for targeted marketing**
- **Offline transactions**
  When cellular or WiFi signal is not available, transactions can be stored securely and uploaded at a later time when your network is accessible.
- **Issue receipts to customer email**
  Receipts can be sent to customer's email addresses when making both cash and card sales. Merchants always receive a copy of the receipt for every sale.
- **Completely secure transactions**
  All payment activities are DES3 encrypted to ensure protection for you and your customers.

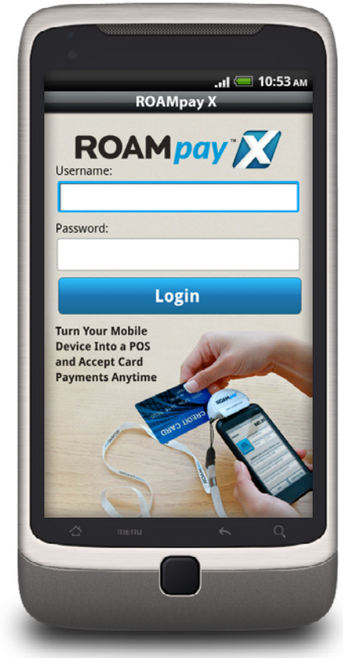


Figure 2

Figure 3

Activate

Upon completion of your registration into the ROAM Data system you'll receive a welcome email with your username and temporary password for your *iOS* or *Android* device. You'll use these to login into the app for the first time (Figure 2). After this initial activation, you will login in using the standard login screen (Figure 4).

When the download is completed, the ROAMpay X application will most likely be stored in the Application folder under the Main Menu. Dragging the icon to the Home Screen will make it easier to access the app (Figure 3).

Please review the following:

- You will need to log into myROAM (my.roamdata.com) and complete the necessary steps *before* ROAMpay X will be ready for use on your mobile phone.
- You will also be able to purchase accessories in the myROAM portal.

Please see the section in this manual for the instructions on myROAM online usage.

NOTE: If you have difficulty running the application, please visit the Device Center (http://devices.roamdata.com) to ensure that the type of phone you have is supported, or contact your reseller for more information.

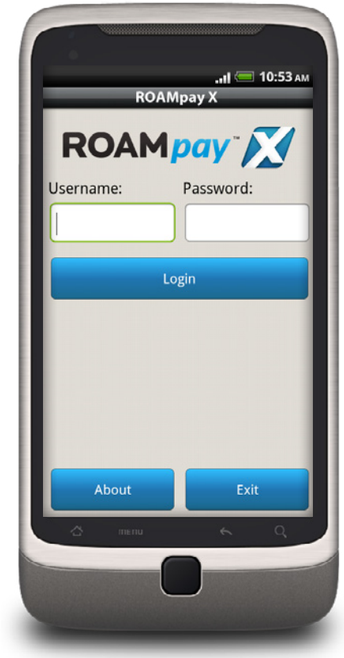


Figure 4

Once the app is loaded, the login screen will appear requesting the username and password (Figure 4). Use the same username and password you used for myROAM. *The username and password are case sensitive.*

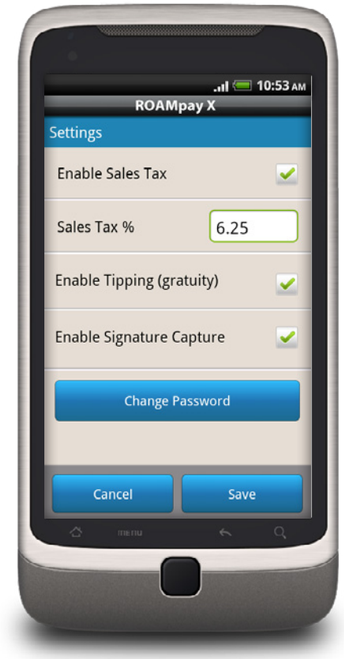


Figure 5

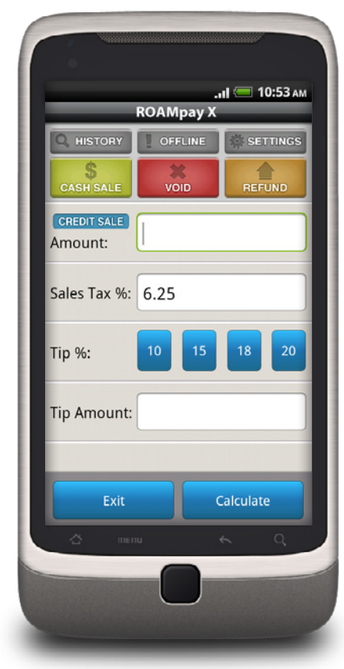


Figure 6

Using the System

Login

NOTE: All users must be authenticated using a username and password before gaining access to any functionality provided by the application. *The username and password are case sensitive.*

Launch ROAMpay X by selecting the icon from your Applications folder. Enter your user name and password.

NOTE: If this is the first time you are launching the application, you will see a screen asking you to setup your default settings (Figure 5).

These settings include:

- Enable Sales Tax
- Enter Sales Tax %
- Enable Tipping (Gratuity)
- Enable Signature Capture
- Change Password

Select the items you wish to enable and select Save. You may change these defaults later by pressing the "Settings" button in the upper menu bar.

After the initial setup above you will land on the home screen which is the "Credit Sale" screen (Figure 6).

From this screen you can produce a credit sale or move to one of the other options which are:

- Cash Sale
- Void
- Refund
- History
- Offline
- Settings

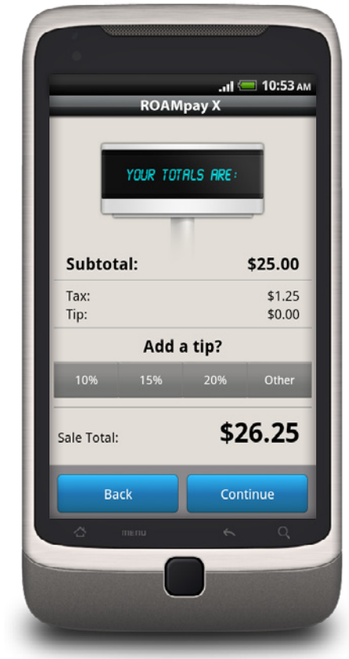


Figure 7

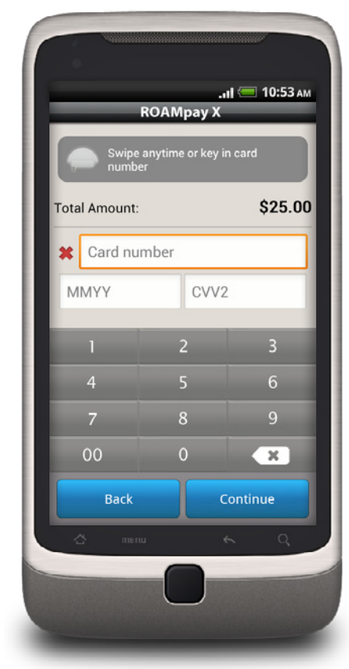


Figure 8

Credit Sale

The main page upon login is "Credit Sale" (Figure 6).
To conduct a Credit Sale please follow the steps below:

- Enter the amount of the transaction using the standard dollars and cents format (eg 10.99).
- The sales tax has been prepopulated only if the sales tax option is enabled on the Settings screen.
- Select "Calculate".
- Select a predefined tip amount by pressing one of the options (Figure 7). You can always enter a different amount by selecting the "Other" option.
- Once the amounts have added, select "Accept Total".

The next screen is where you will capture card data for either a swiped or manual transaction (Figure 8).

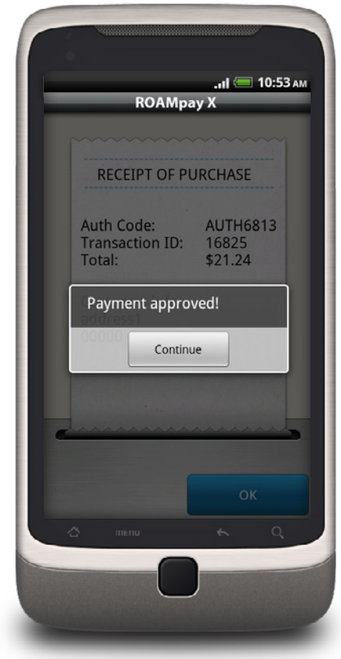


Figure 9

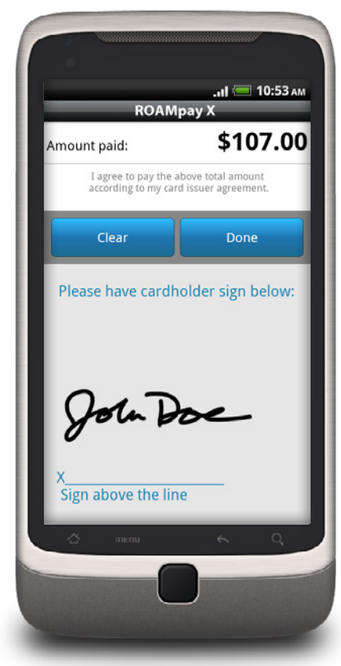


Figure 10

For Swipe-Capable Devices

The status of the swiper will display at the top of the screen.

Swipe the card through the swiper as directed in the "Swipe Instruction Guide". The truncated card data will appear along with the expiration date and the CVV2 security code.

For Manual Entry

The user will hand-key the following:

- Credit card number
- Expiration date
- CVV2

The Payment Approved message will display (Figure 9).

The next section is optional information to be added if you wish to capture customer information:

- Name
- Address 1
- Address 2
- Zip Code
- City
- State

You may either enter the information and select "Capture", or select "Skip" to move to the next screen.

If you have enabled signature capture you will be prompted to have the card holder sign on the screen (Figure 10).

The customer signs in signature box and selects "Done".

The next screen is where you will optionally capture:

- Email Address
- Invoice/Order#
- Notes

NOTE: Entering an email address will automatically send the customer a receipt upon transaction submission.

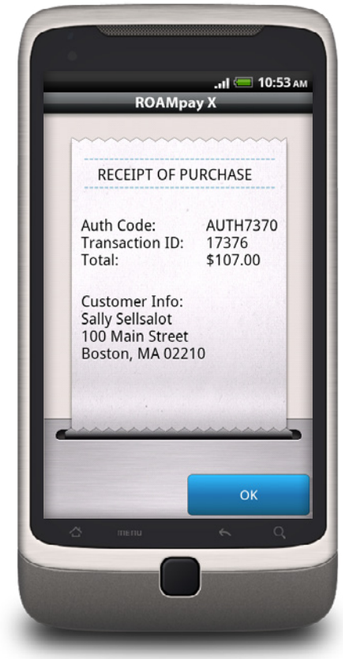


Figure 11

You may either enter the information and select "Capture", or select "Skip" to move to the next screen.

A copy of the receipt will display (Figure 11).

Select "Finish" to return to the credit sales screen.

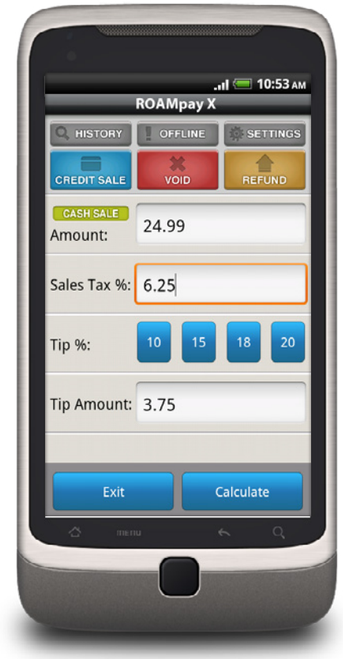


Figure 12

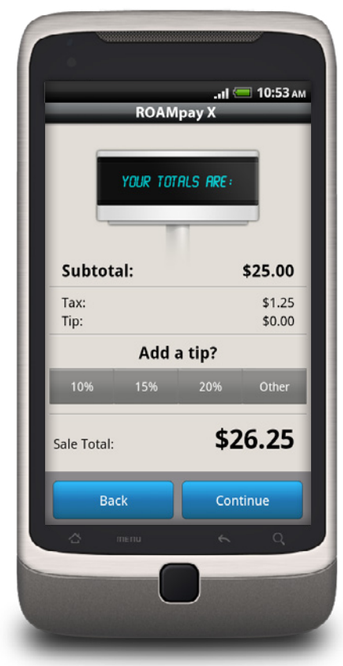


Figure 13

Cash Sale

Cash sales provide the following benefits:

- Does not go to the processor for any approval
- Used for tracking your cash sales
- Provides an email receipt for your customer
- Viewable on your myROAM account

Select the "Cash Sale" button to start your transaction.

- Enter the amount of the transaction using the standard dollars and cents format (eg 24.99) (Figure 12).
- The sales tax has been prepopulated only if the sales tax option is enabled on the Settings screen.
- Select "Calculate".
- Select a predefined tip amount by pressing of the options. You can always enter a different amount by selecting the "Other" option.
- Once the amounts have added, select "Accept Total".
- The Subtotal, Tax and Tip are displayed along with the Sale Total (Figure 13).
- Select "Accept Total" if the information is correct or, "Back" if the information needs to be changed.

The next section is optional information to be added if you wish to capture customer information:

- Name
- Address 1
- Address 2
- Zip Code
- City
- State

You may either enter the information and select "Capture", or select "Skip" to move to the next screen.

The next screen is where you will optionally capture:

- Email Address
- Invoice/Order#
- Notes

NOTE: Entering an email address will automatically send the customer a receipt upon transaction submission. You may either enter the information and select "Capture", or select "Skip" to move the next screen.

Reverse Phone Lookup

NOTE: This function is optional and not required to process with the exception of manual key entry which requires address and zip code entry. It shows up in "Cash Sale" mode only.

Select "Next" and you'll see the Reverse Phone Lookup screen. You may lookup a phone number to collect the data for your records. To collect the data check "Collect Cust. Data".

You can use any listed landline phone number with this feature. If listed, the address fields will automatically fill in with address information found under that number.

If you check the "Collect Cust. Data" without entering a phone number you can manually enter the customer information. This information includes:

- Name
- Address 1
- Address 2
- Zip Code
- City
- State

Select "Continue" and the request will be submitted. You will receive a "Payment Submitted" response, select "OK."

Void Transaction

A void means clearing a transaction that was recently performed. Voids must be performed prior to settlement occurring. For some processors this must occur in as little as 20 minutes. If a void cannot be performed you may process a refund instead.

- Select the Void button. This will bring up the latest transactions and their amounts.
- Select the transaction.
- Press the "Void Now" button and you will be prompted to verify the transaction to void.
- Select the "Void Now" button and the application will request a void. If the request was approved the screen will display "Transaction voided" and the authorization code. If declined, the decline will be displayed.
- Select "Continue" to proceed back to the Void screen.
- Select "Back" go back to the home screen.

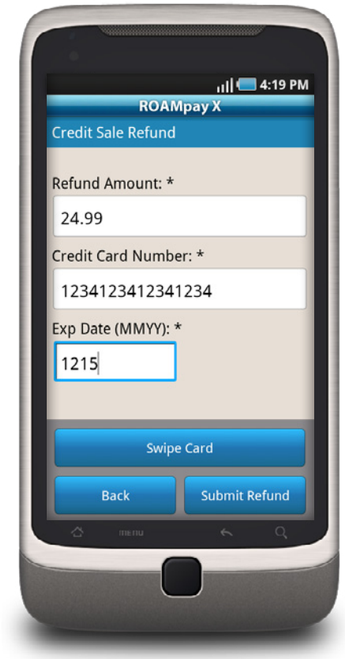


Figure 14

Refund

A refund is a credit reverse which allows you to credit the card for any amount.

- Credit
- Cash

To perform a refund, select "Refund" from the home screen which will bring you to the refund selection screen (Figure 14).

For Swipe Credit Returns

- Enter the amount to be credited.
- The device will initiate the swipe and display "Swipe anytime..."
- Swipe the card. The data will be displayed with the expiration date and amount to be refunded.
- Select "Submit Refund" to transmit the refund request. If successful and approved you will receive an approval message and an authorization code.
- Select "Continue" to return to the refund selection screen.

For Manual Entry Credit Returns

- Enter the amount to be refunded.
- Enter the credit card number.
- Enter the expiration date.
- Select "Sumbit Refund" to transmit the refund request. If successful and approved you will receive an approval message and an authorization code.
- Select "Continue" to return to the refund selection screen.

For Cash Refund

- From the refund menu, select "Cash Sale Refund."
- Enter the amount of the cash refund.
- Select "Submit Refund" to transmit the refund request. You will receive a message if the refund was successful.
- Select "Continue" to return to the refund screen.

Figure 15

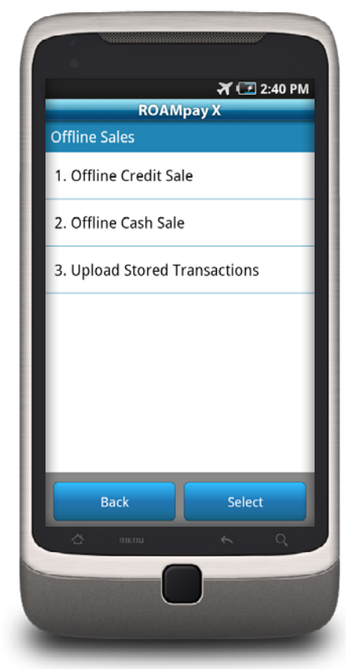


Figure 16

Offline

Offline transactions (also known as Store and Forward) are for times when there is no method of transmitting the credit card information to the processor. This allows the user to store the card data in the application and run the transaction at a later time when data transmission is available.

NOTE: Offline transactions will not perform an authorization at the time of swiping or entering the card data. The merchant assumes all risks if the card is declined or lost in transmission. It is highly suggested that all offline transactions also include the card data and merchant contact information being captured for possible recreation of the transaction if needed.

There are 2 methods for entering Offline mode:

1. Forced into Offline due to no coverage (Figure 15)
2. Logging in and selecting Offline

If you have network coverage and are able to login but wish to perform offline transactions select "Offline" in the upper menu bar.

If you do not have connectivity, you will be asked to enter "Offline Mode" (Figure 15) when logging in and must select "Continue." You will receive a second message indicating you are in offline mode. Select "Continue."

There are 3 options under Offline (Figure 16):

1. Offline Credit Sale
2. Offline Cash Sale
3. Upload Stored Trxs (transactions)

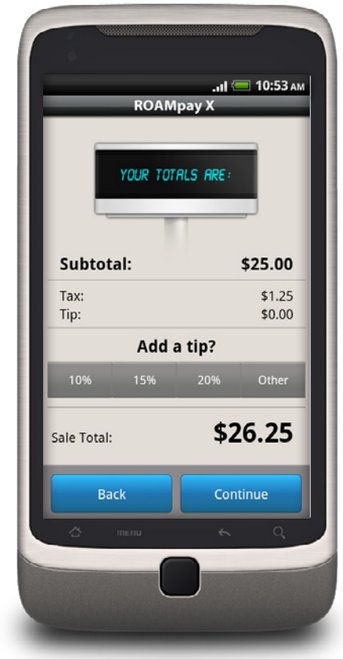


Figure 17

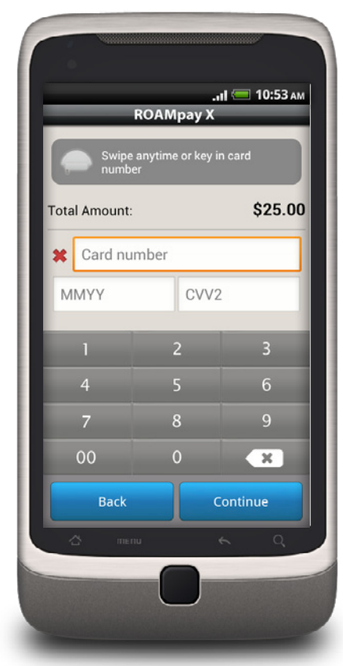


Figure 18

Offline Credit Sale

This allows you to capture the credit card information which will be stored until the device is able to transmit and an upload can occur.

From the Offline Sales menu:

- Enter the amount of the transaction in the "Amount" section using the standard dollars and cents format (e.g., 10.09). The sales tax has been pre-populated only *IF* the sales tax option has been enabled in the setup.
- Tip amount can be added using a predefined percentage or enter a custom tip amount *IF* Tipping has been enabled in settings menu.
- Once the amounts have been added in the respective fields select "Calculate."
- The Subtotal, Tax, and Tip will be displayed along with the Sale Total (Figure 17).

Select "Continue" if the information is correct or "Back" if the information needs to be changed.

The next screen (Figure 18) is where you will capture the following:

- Card data – *Manual or Swipe*
- Expiration Date
- CVV2 Number

Card data may be entered manually or by swiping the card if your device is swipe-unit capable.

For Swipe Capable Devices

- Select the Icon "Swipe Card" (Figure 18).
- The user will be prompted to "Swipe Card Now."
- The user will swipe the card through the swiper as directed in the "Swipe Instructions Guide." The truncated card data will appear along with the expiration data and security code data.
- If the user wishes to enter any of the optional data then do so at this time and select "Submit Payment."

For Manual Entry

The user will hand-key the:

- Credit card number
- CVV
- Expiration date

The user will also be required to enter in the customer data fields:

- Address
- Zip code

All other fields for address are optional.

For either Manual or Swipe-Capable Device entry:

- Select "Continue"
- Enter Notes (*optional*)
- Enter Email address and check Send Receipt (*optional*)
- Select "Submit"
- Receipt of Purchase Notification displays
- Select "OK"

The transaction has been stored.

NOTE: The transaction will need to be uploaded to the processor once network connectivity is available.

Offline Cash Sale

This option allows you to perform a cash sale to keep the information for your records and send a receipt to your customer. This will only occur when the transactions are uploaded.

From the Offline Sales menu:

- Select "Offline Cash Sale."
- Press "Select."
- Enter the amount of the sale.
- Enter tip amount into the respective fields.
- Select "Calculate." The totals screen will be displayed allowing you to continue or go back to change the information.
- Select "Continue."
- Enter Notes (*optional*).
- Enter an email address if you wish to send an email receipt to your customer (*optional*). Assure you check the "Send Email" box.
- Select Next.
- Enter phone number if you want to perform a reverse phone number lookup (*optional*).
- Select "Collect Cust. Data" if you wish to collect the customers address information (*optional*).
- Checking the "Data Collection" box and selecting "Next" will bring you to a screen allowing data entry for name, address, zip, city, and state.
- Enter any or all data and select "Continue."
- The transaction will be saved after acknowledgement.

Upload Offline Trxs

This option allows you to upload any transactions stored while in offline mode. You must have connectivity available for this to be performed.

From the Offline Sales menu:

- Select Upload Stored Trxs.
- Press "Select."
- All stored transactions (if any) will be displayed.
- You may view the details of a specific transaction by selecting the transaction and press the "Details" icon.
- Select "Upload All." The transactions will upload and display the approval or decline.
- Select "Continue" for each transaction uploaded. A completion message will be displayed.
- Select "OK."
- Select "Back" to go back to the main Offline Cash Menu.

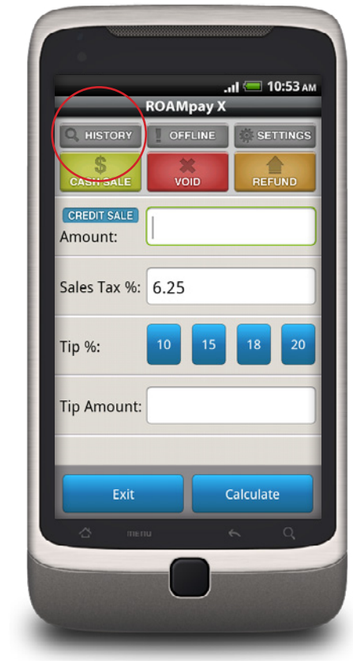


Figure 19

History

History of transactions can be viewed from the device by selecting the "History" icon (Figure 19) in the upper menu bar.

You must have connectivity to use this feature.

The History function allows for the following functions:

- Last 30 Days
- Current Batch

Last 30 Days

Select the "Last 30 Days" and press "Select." This will load the transactions on the device. You can view any of the transactions in the list by selecting the transaction and pressing the "Select" button. This will provide a view of the transaction including the authorization number. When there are multiple pages of transactions use the arrow buttons to scroll through the transactions.

Current Batch

Select the "Current Batch" from the History Menu and press "Select." This shows the latest batch of transactions the processor has. This will change depending upon the processors batching schedule. You can view any of the transactions in the list by selecting the transaction and pressing "Select". This will provide a view of the transaction including the authorization number.

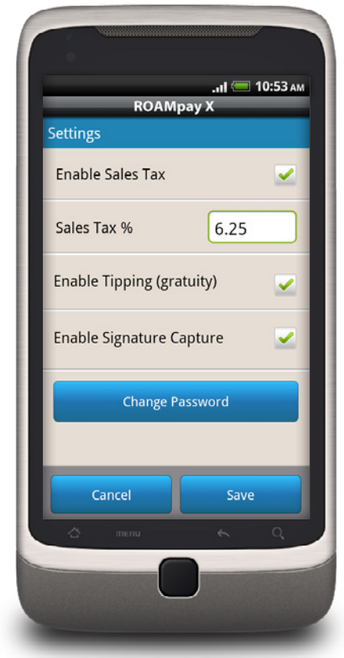


Figure 20

Settings

The settings function allows changes to the following settings (Figure 20):

- Enable Sales Tax
- Enter Sales Tax %
- Enable Tipping
- Enable Signature Capture
- Change Password

These are the same settings which were enabled in the original setup and can be changed or modified at any time.

Enable Sales Tax

Select to enable or disable sales tax. If the check box is checked, sales tax is enabled, if not it is disabled.

Enter Sales Tax %

Enter the % of sales tax used.

NOTE: This option is dependent upon the "Enable Sales Tax" option being checked.

This option enables tipping while entering the charge. If the check box is checked, Tipping is enabled, if not it is disabled. Select "Save" to save the changes.

Enable Tipping

This option enables tipping while entering the charge. If the check box is checked, Tipping is enabled, if not it is disabled.

Enable Signature Capture

This option enables signature capture when the transaction is complete.

- If the check box is checked, Signature Capture is enabled. Select "Save" to save the changes.
- If the check box is not checked, Signature Capture is not enabled.

Change Password

This option allows you to change your existing password. You cannot change your password while in Offline Mode.

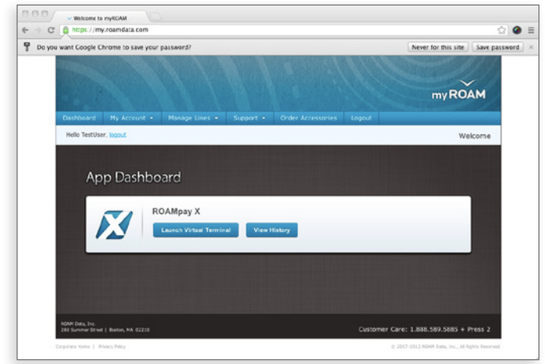


Figure 21

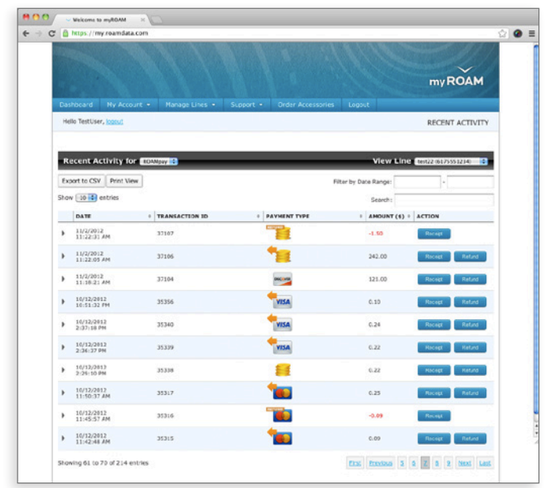


Figure 22

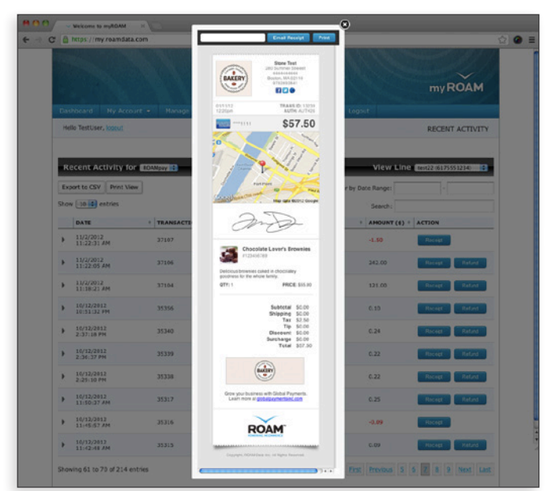


Figure 23

myROAM

Dashboard

The **App Dashboard** (Figure 21) allows you to log into the Virtual Terminal, or to view the history of your transactions.

Click the **Launch Virtual Terminal** button to launch the Virtual Terminal.

Click the **View History** button to display a list of all your transactions (Figure 22). When logged in as a masterline you can view the transactions for each or all of your sublines by using the drop-down menu to select a subline. When logged in as a subline you will only see your transactions.

Use the drop-down menu in the upper left corner of the page to change the number of entries displayed. Use the Filter by Date Range fields to search for transactions during a specific time period. Use the Search field to search for a specific transaction or type of transaction, e.g. type mastercard to view all MC transactions. Click on the column heads to sort your transactions.

To view the details of a transaction, click anywhere on the transaction row. To close the transaction details window click on the row again.

You can export to a .csv file or print the transaction list using the buttons in the upper left corner of the page. When there is no search or filter in the transaction history table, the export will display in the report all available transactions up to 1,000 transactions. If only a partial list is displayed because of a keyword search or a filter, only that partial list will be displayed.

If you're logged in as a masterline you can export a report for each subline separately or all sublines in one report.

You can view the receipt (Figure 23) for each transaction by clicking the **Receipt** button located on the right in the transaction history table (Figure 22). To send the receipt to a customer, click the button; enter the customer's email address and click the Email Receipt button. If a customer email address was previously entered, it will be prepopulated. You can print the receipt by clicking the Print button.

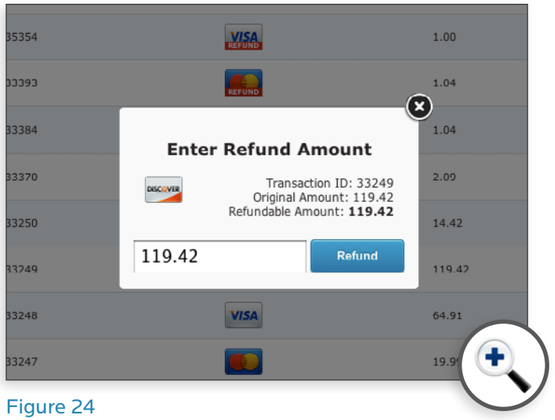


Figure 24

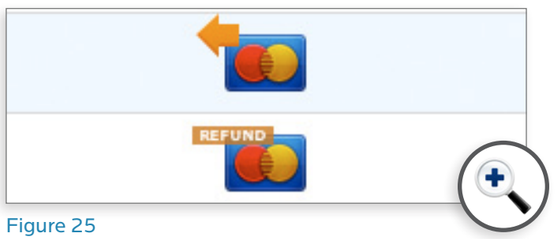


Figure 25

Figure 26

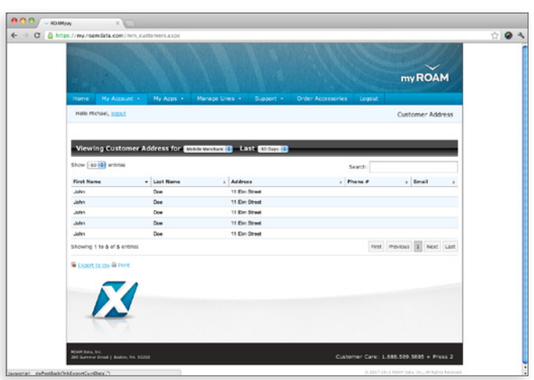


Figure 27

To issue a refund for a transaction, click the **Refund** button located on the right in the transaction history table. When the dialog box displays (Figure 24), enter either the full or partial amount to be refunded, click the Refund button, then confirm the refund. A partial refund for an unsettled transaction will not be permitted. Once the refund has been issued an orange arrow displays at the top left corner of the Payment Type icon in the original transaction. A new transaction will be created for the refund transaction and "Refund" in orange will appear on the payment type icon (Figure 25).

When a transaction is performed in offline mode and gets declined (an **"offline decline"**) a red decline bar will appear on the top left corner of the payment type icon (Figure 26).

My Account

This contains the following links:

- My Customers
- Edit Billing Information
- Edit Merchant Information
- Reprovision Phone
- Edit Email Receipt
- Account Setup

My Customers

Use this page to review your saved customers list including customer name, address and phone number information (Figure 27). Use the drop-down menus to change the number of entries and number of days of entries displayed.

On the bottom left corner select Export to .csv to export your customer information in spreadsheet format, or, select Print to print a report.

Edit Billing Information

This page allows you to change the way your ROAM Data fees are deducted. You can choose to be billed via ACH (checking account) or credit card.

NOTE: This option may not be available for certain merchant providers.

If your billing information is not correct and the account becomes delinquent, your account can be deactivated. This does not affect how your funds are deposited as ROAM Data does not handle funding.

Edit Merchant Information

Use this page to change information such as your phone number, email, or mailing address.

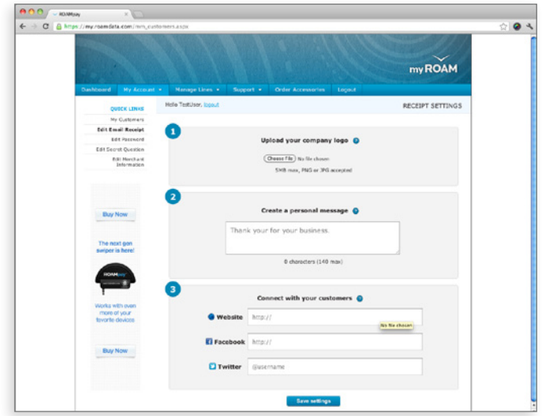


Figure 28

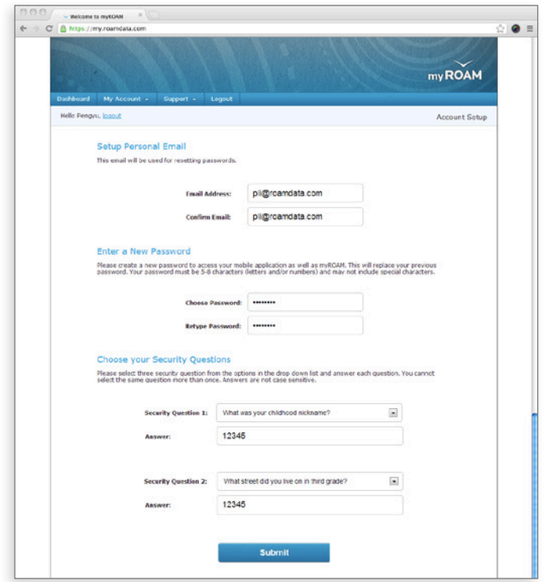


Figure 29

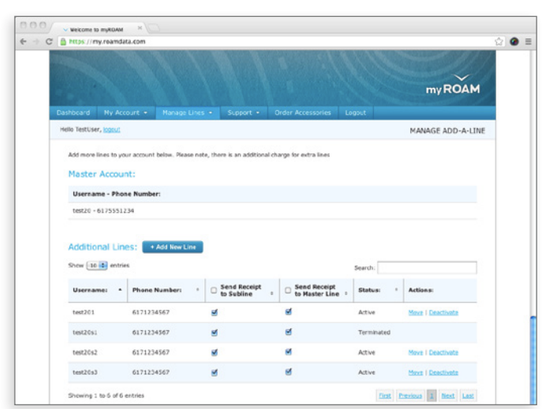


Figure 30

Reprovision Phone

Use this page to generate a new activation code. This is only for ROAMpay users, not ROAMpayX users.

For ROAMpay X users, this page gives you information on what app stores you can use to download the new app.

Edit Email Receipt

This page allows you to customize your email receipt by adding your company logo, a personalized message to the buyer, and your business website and social media information (Figure 28).

Account Setup

Use this page (Figure 29) to setup **(1)** a personal email that will be used in case you need to reset your password, **(2)** your password, which will be used to access the myROAM site as well as your mobile application, **(3)** your two security questions which will be used if you need to reset your password as well as for identification purposes if you call technical support.

Manage Lines

Use the **Manage Add-a-Line** page to add, view and manage your sublines (Figure 30). Use the Search field to search for a specific subline.

You can deactivate or activate each subline, as well as move a subline to reassign it to a different user. For each subline you can also determine who will receive a receipt of that subline's transactions you (as the masterline) and/or your subline.

Support

This tab has seven categories:

- Getting Started
- Training Videos
- Helpful Documentation
- FAQs
- Terms of Usage
- Return/Warranty Info
- Contact Us

Getting Started

This page has links and helpful advice on how to process transactions via the web or device.

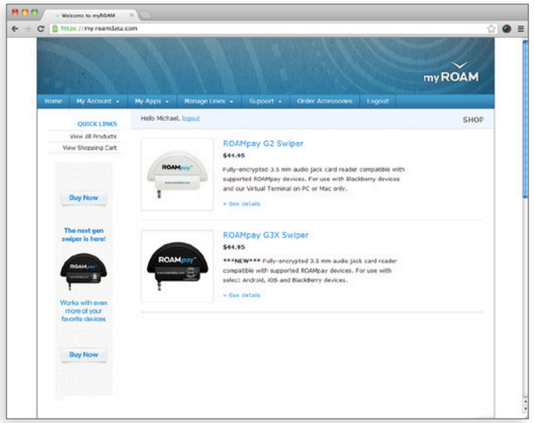


Figure 31

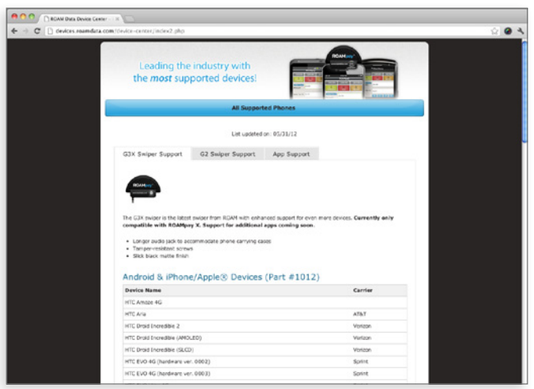


Figure 32

Training Videos

Video tutorials of the installation and use of the application are available on this page. These videos must be viewed via a computer, and are not for viewing on a mobile device.

Helpful Documentation

User guides and installation instructions are available on this page. This user guide can be found in this section.

FAQs

The Frequently Asked Questions section provides answers to general questions. More FAQs can be found at www.roamdata.com/support.

Terms of Usage

The terms and conditions on this page are the same set accepted when signing up for the ROAMpay application. They are displayed here for general reference.

Return/Warranty Info

This section provides ROAM Data's repair and warranty policy.

NOTE: Your reseller may have provided hardware which is not covered by ROAM Data. Contact your reseller for information regarding repair or warranty.

Contact Us

Most issues can be resolved by contacting your merchant service provider. Please contact them for all questions, including training, funding, and fees.

If you're unable to resolve your question or problem via your merchant service provider, use the online form on this page to contact us.

Order Accessories

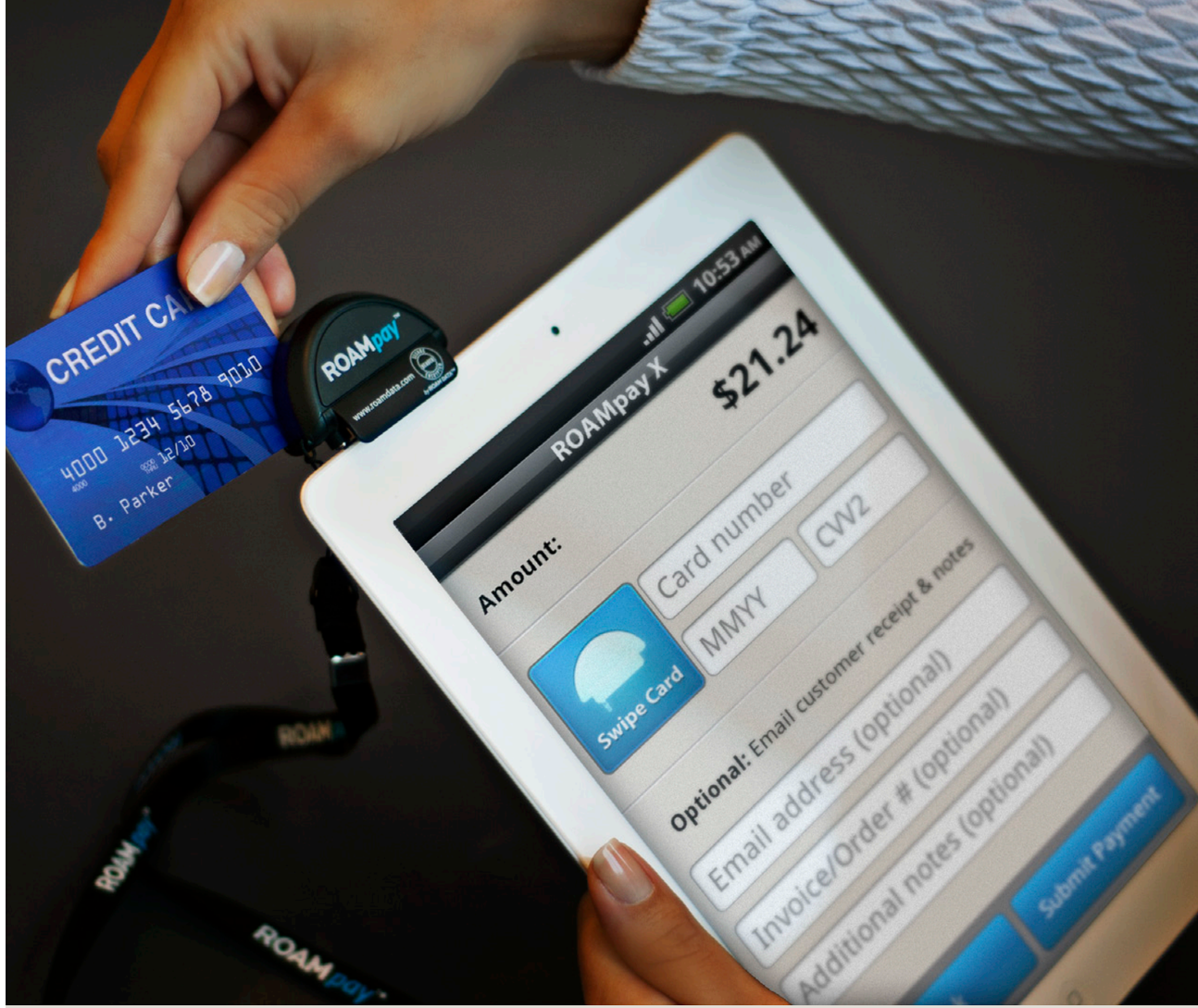
You can purchase a ROAM reader for your mobile device via this page (Figure 31).

To ensure your device is supported, please visit devices.roamdata.com (Figure 32).

If Order Accessories is not visible, please contact your merchant service provider for information about accessories.

Logout

Click this tab to log out of myROAM.



Contact Us

For supported devices:
devices.roamdata.com

For sales inquiry:
888.589.5885 + press 1

Customer support:
support@roamdata.com

General inquiry:
info@roamdata.com

Check out our blog:
http://blog.roamdata.com/

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