



MX Express User Guide

What is MX™ Merchant Express?

Application Overview

MX™ Merchant Express is a simple iOS and Android card payment application. MX™ Merchant Express features:

- Card payments with optional tip and tip adjust
- Card returns
- Payment history with void and return options
- Print, email and text receipts
- Multi-merchant option

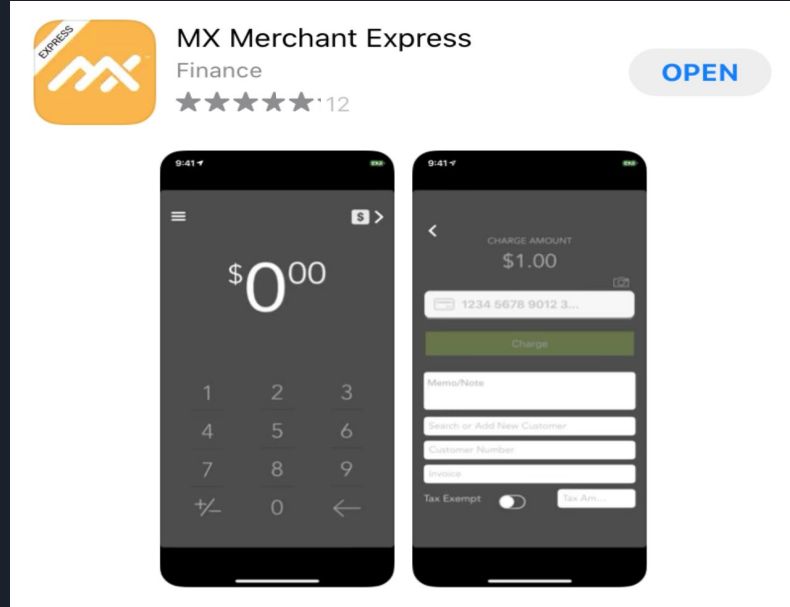
Certified Devices and Peripherals

MX™ Merchant Express is certified to work on mobile iOS devices with iOS 7.0.x or higher and Android devices 5.0 or higher. While Express is an iPhone App, it will also render on an iPad.

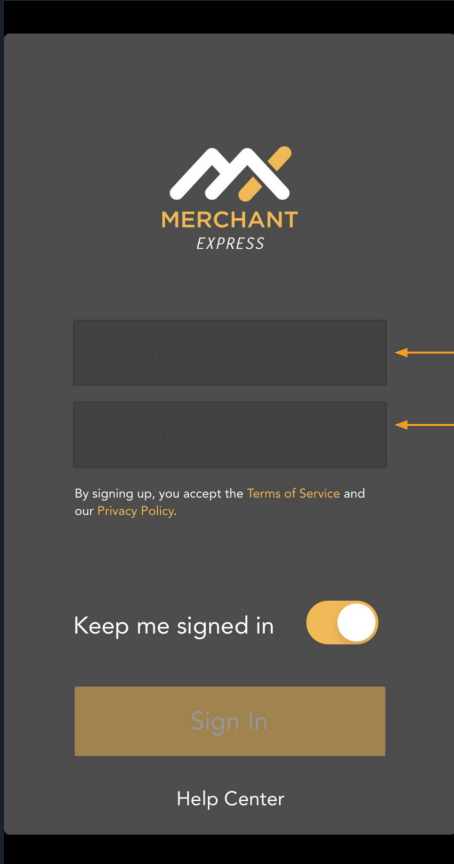


Download and Install

MX™ Merchant Express is available via Apple's™ App Store and Google's™ Play Store. Search for MX™ Merchant Express and download the App. Once installed, tap on the button to open. The first time you open the application, you are welcomed.



Login



The image shows a mobile app login screen for Merchant Express. At the top is the Merchant Express logo, which consists of a stylized 'M' made of two white and orange lines, with the words 'MERCHANT' and 'EXPRESS' below it. Below the logo are two input fields for 'Email' and 'Password'. Below these fields is a line of text: 'By signing up, you accept the Terms of Service and our Privacy Policy.' Below this text is a toggle switch for 'Keep me signed in', which is currently turned on. Below the toggle is a large orange 'Sign In' button. At the bottom of the screen is a link for 'Help Center'.

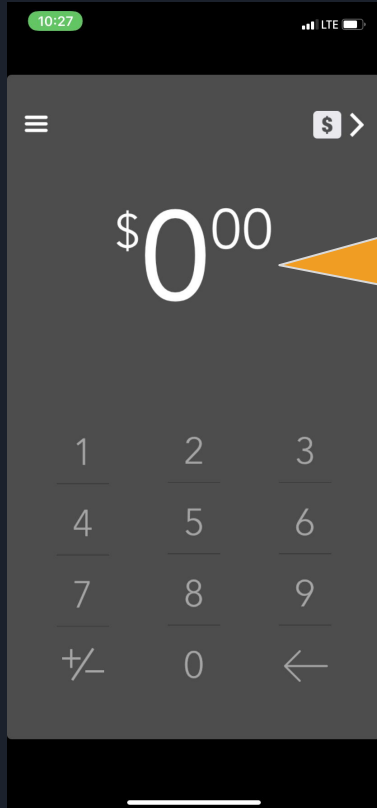
Enter your MX Merchant login credentials and select **Sign In**. Please note that by signing in you are accepting the EULA which is available by tapping on **Terms of Service**.

On the first Sign In, the App will ask to access the microphone. If you are using a card reader that connects through the headphone jack, select ok.

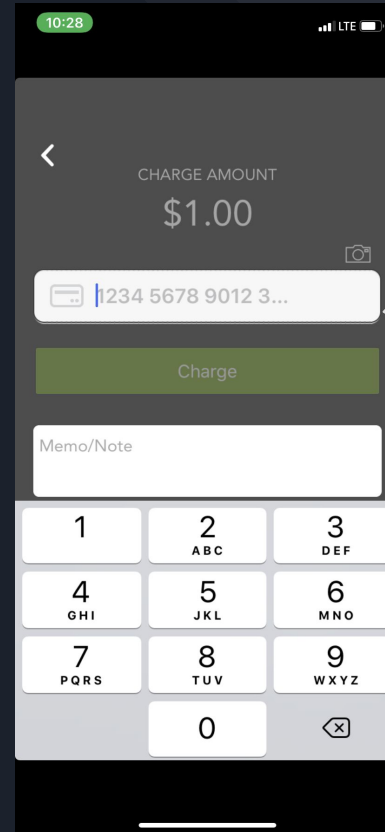
Multi-Merchant Note: If credentials provide access to multiple merchants, the initial sign on will prompt for merchant selection. To switch to processing for another merchant, go to **Menu->Settings->Location** and tap on the desired merchant.

If you require assistance with credentials or Sign In, call for support: 1-855-813-5293

Processing a Payment



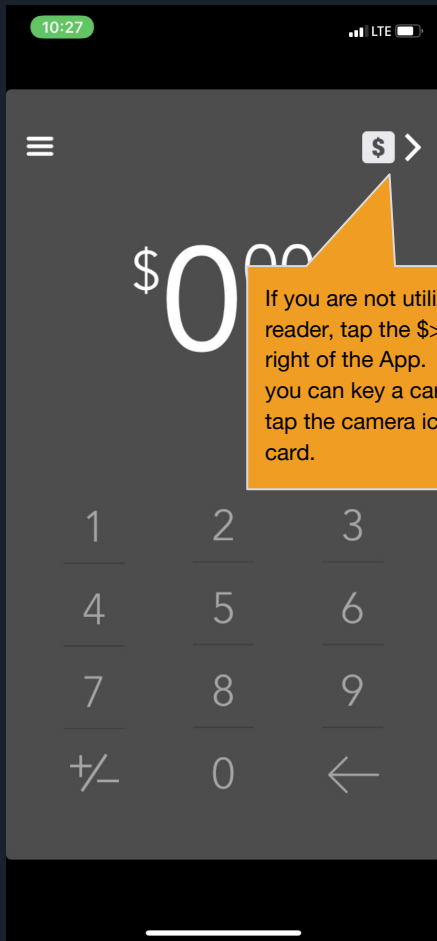
MX™ Merchant Express provides two ways to enter a card payment: keyed, or swiped. To take a payment, first use the keypad to enter the amount. If a mistake is made press the bottom right button to start over or delete a single digit.



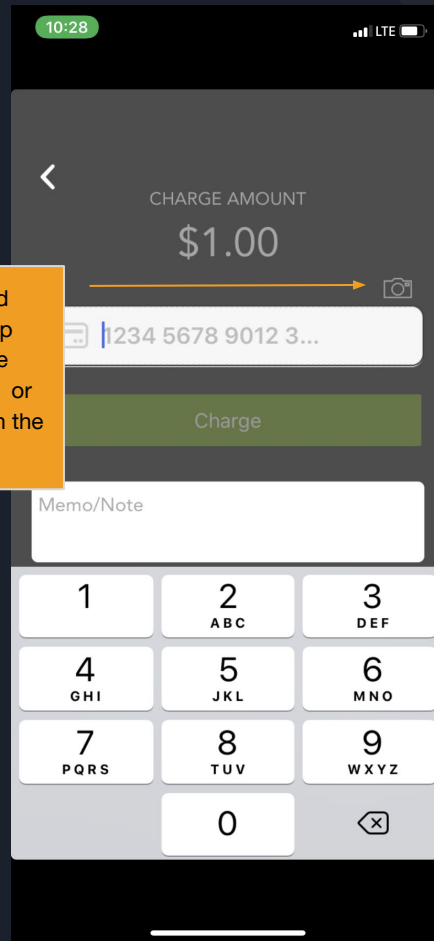
If a card reader is attached, enter the amount due and press the dollar sign to insert the card. The number and expiration date are populated from the card swipe.

*Please note, MX™ Merchant Express reads swipes from encrypted and unencrypted card readers. However, if you are using an encrypted reader, it must be encrypted with the Priority key.

Processing a Payment



If you are not utilizing a card reader, tap the \$> on the top right of the App. From here you can key a card number or tap the camera icon to scan the card.

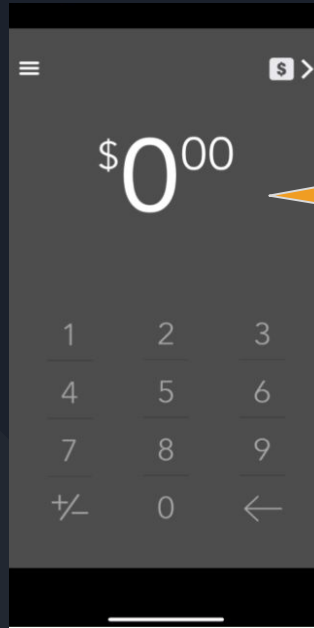
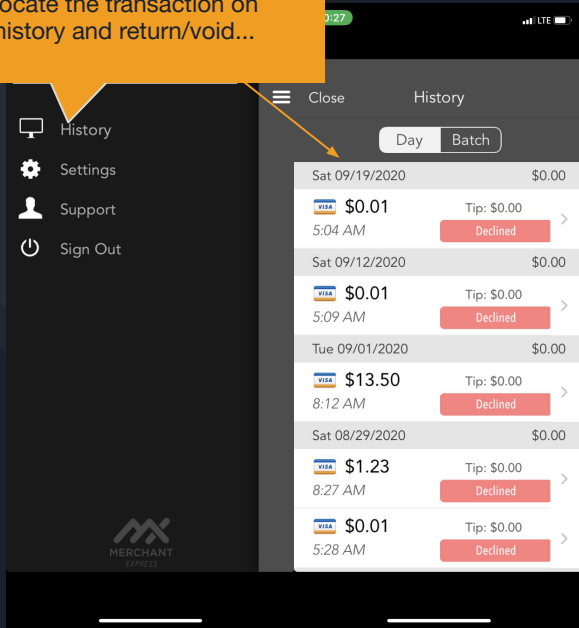


When you key a valid card number the entry field slides to accept entry of expiration date and CVV2. To use card.io to read the card, hold the card under the frame until the entire box turns green. When the entire card is read, a photo of the card is displayed with entry fields for expiry date and CVV2.

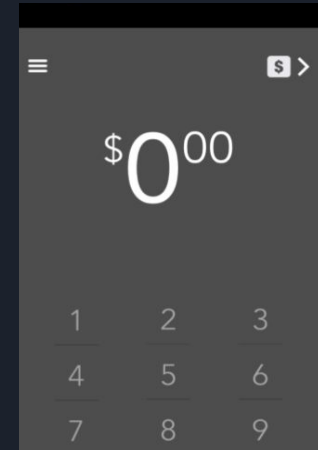
*Note that the card scan function currently only works with indented card numbers and not printed card numbers.

3 Options for Processing a Return

To process a return on MX™ Merchant Express, either locate the transaction on history and return/void...

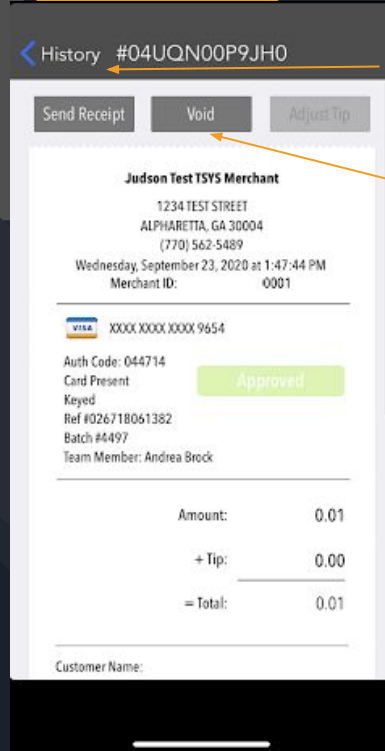


... or on the keypad tap the +/- key and enter the return amount.



If a card reader is attached, simply swipe the card. If you are not utilizing a card reader, tap the \$> on the top right of the App. From here you can key a card number or tap the camera icon to scan the card. When you key a valid card number the entry field slides to accept entry of expiry date and CVV2. You may use card.io to read the card as well and as explained above.

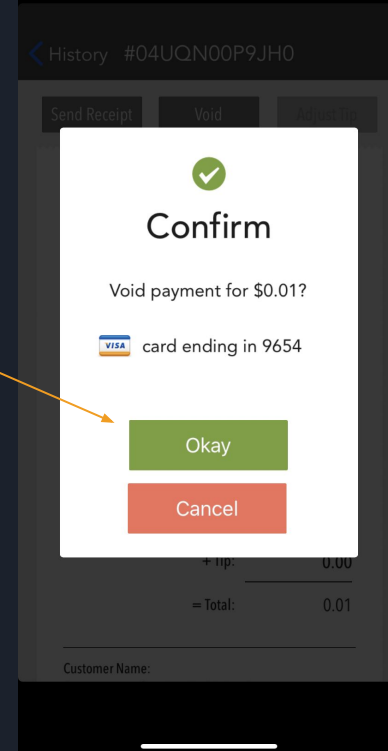
Processing a Void for Open Batch Transactions



From the menu go to History and locate a payment to be voided*.

**Note that this is not for settled sales.*

Then click on Void and Confirm



Menu

The MX™ Merchant Express Menu provides access to the History, Settings and Support



History



Settings



Support



Sign Out



History provides a list of payments and batches with status. Payments are listed by day with payment and tip total provided by date.

- Tap on the payment, to
 - View or send receipt
 - Void or return payment
 - Adjust tip

Receipts - MX™ Merchant Express offers email, text, and printed receipts

- Email Receipts may be sent by entering a valid email address and selecting send. By default, the email address is associated with the card and is selectable next time the card is used for payment. If you do not wish to associate the email with the card, toggle the selection off. If there are one or more emails listed, select one or enter a new email address.
- Texting receipts may be sent by entering a valid mobile number and selecting send. By default, the mobile number is associated with the card and is selectable next time the card is used for payment. If you do not wish to associate the mobile number with the card, toggle the selection off. If there is one or more mobile numbers listed, select on or enter a new mobile number.
- Printed receipts are printed by selecting print. The receipt prints to a connected WiFi or Bluetooth Printer.

Menu



Location

- Location displays the DBA and MID of all merchants associated with current sign on. The selected merchant (DBA with ✓), is the merchant account currently processing. To switch processing to another merchant, simply tap on the merchant.

Signature

- Signature is required for all transactions over \$25. The signature can be captured on a printed receipt or digitally on the App. collect signature via the App, tap on the orb. To collect via printed receipt, refer to IX.C Print Receipt.

Tips

- Tips may be collected on the App or on the printed receipt. To collect on the App, Digital Signature and Tips must be on. Refer to Signature to turn on digital signature. To turn tips on, tap on the orb . Tips are defaulted to automatically calculate at 15%. Tap on any other setting to change this default.
- Tip Collection setup will display the default tip. To modify the tip, Tap on:
 - No Tip to remove tip
 - 15% to adjust tip to 15%
 - 20% to adjust tip to 20%
 - 25% to adjust tip to 25%
- If the tip is collected on the printed receipt, connect to a printer, turn off digital signature and turn tips on. The receipt will print on the selected printer. The customer will manually enter the tip, total the ticket and sign.
 - To adjust the payment to include this tip, go to Menu-> History, locate the payment, and select Adjust Tip. Enter the tip amount specified by the customer on the printed receipt and select Apply.



History



Settings



Support



Sign Out



Menu



History



Settings



Support



Sign Out



Printers

- MX™ Merchant Express will print receipts to a Bluetooth or network printer. To connect to a Bluetooth printer you must first pair the Bluetooth printer to your device and then select the printer in Express.
 - To setup up Bluetooth printer:
 - Turn on your Bluetooth printer
 - In Settings on your device select and turn on Bluetooth
 - To pair with the printer, tap on the printer in the Device list
 - The status displays as connected displays when successfully paired
 - Sign in to Express and got to Menu->Settings->Printers
 - Tap + and select Bluetooth Printer
 - Select the paired Bluetooth Printer (the ✓ denotes the selected printer)
 - To connect to a Network printer:
 - Select + and Network Printer. The App will list printers available on your WiFi network. Tap on the desired printer to connect (the ✓ denotes the selected printer)

Card Readers

- Tap on Card Readers to see any attached reader. Tap on a reader for detailed reader information.

Appearance

- If you wish to change the default display color for the App, tap on Appearance and tap on the color of your choice.

Advanced

- Advanced allows advanced data to be collected when processing a payment such as adding a memo, adding a customer, entering a customer number, invoice number and if tax exempt.
- Card present may be set to Always, Never or Ask

Menu

- 
-  History
 -  Settings
 -  Support
 -  Sign Out



To contact Customer Support, please tap on Support to access customer support phone number and email address. Tap on the phone to dial support. Tap on the envelope to email customer support. To better assist you, diagnostic information is provided. This information is automatically included if you tap on email support@mxmerchant.com to send email. If you call, the client services representative may ask for any or all of this information.

Menu

 History Settings Support Sign Out

To sign out of the App, tap Sign Out. The App signs out the current user and returns to Sign In.