



MERCHANT *express*

USER GUIDE

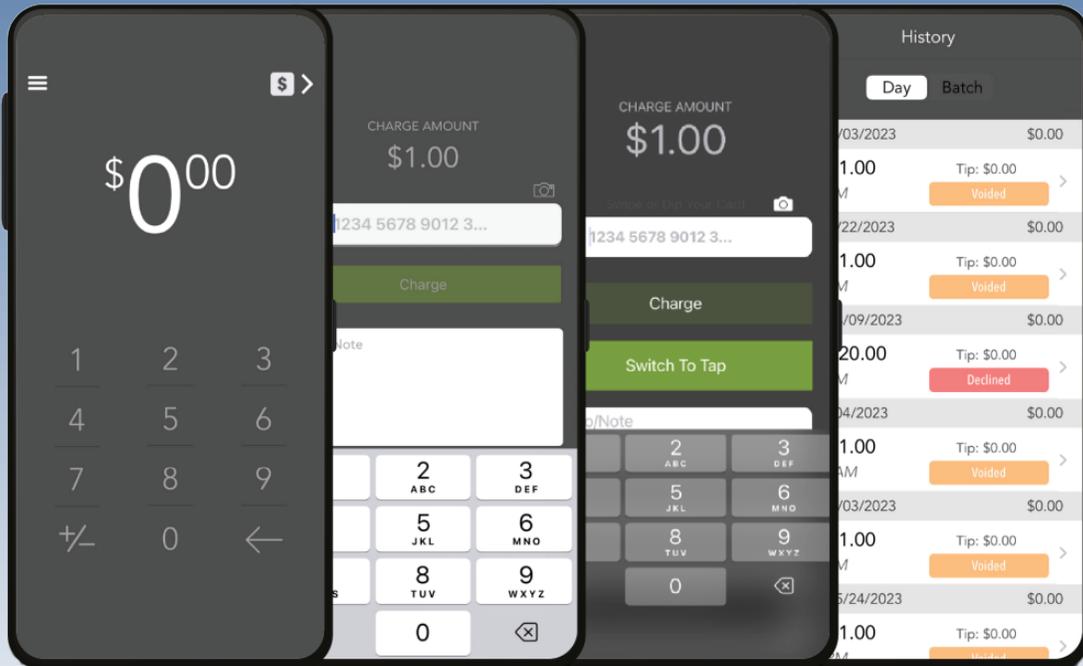


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// APPLICATION OVERVIEW

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

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

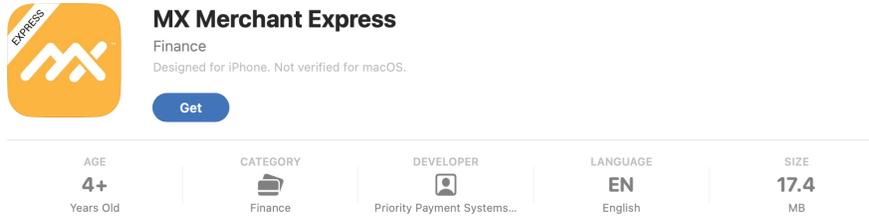
✓ Certified Devices and Peripherals:

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.

Apple App Store:

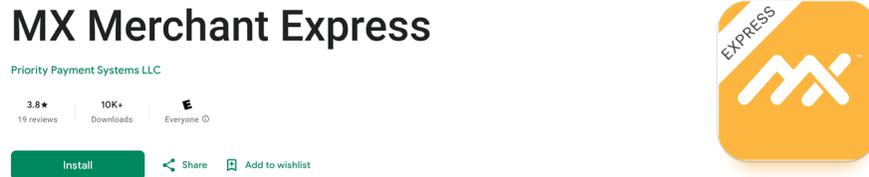


MX Merchant Express
Finance
Designed for iPhone. Not verified for macOS.

Get

AGE	CATEGORY	DEVELOPER	LANGUAGE	SIZE
4+ Years Old	Finance	Priority Payment Systems...	EN English	17.4 MB

Google Play Store:



MX Merchant Express
Priority Payment Systems LLC

3.8★
19 reviews

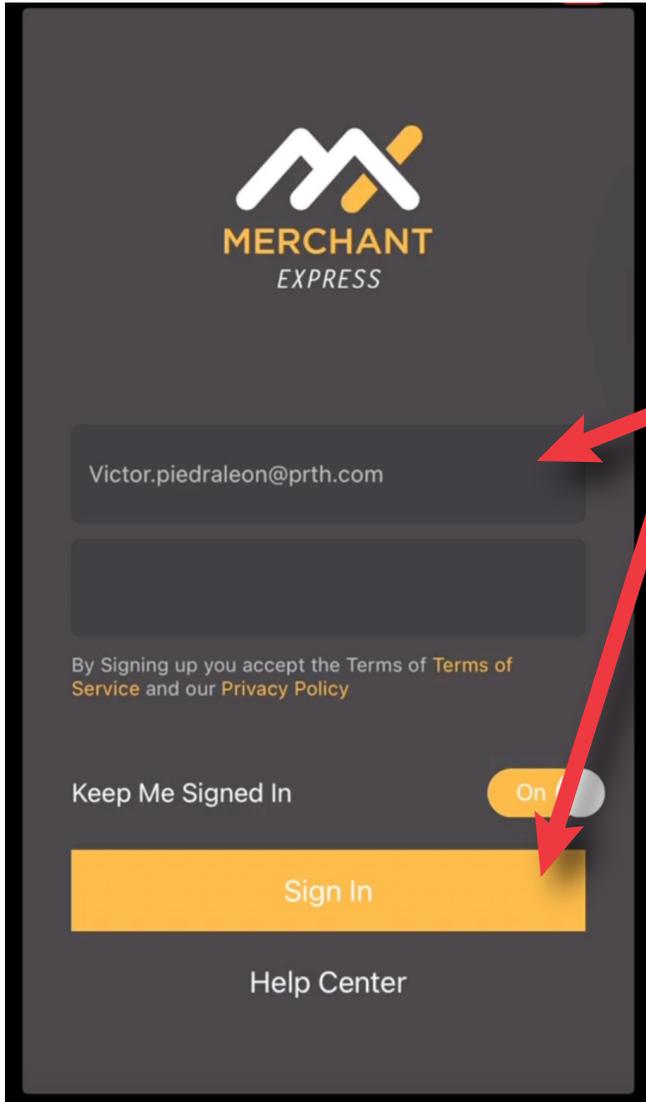
10K+
Downloads

Everyone

Install Share Add to wishlist



// LOGIN



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**.

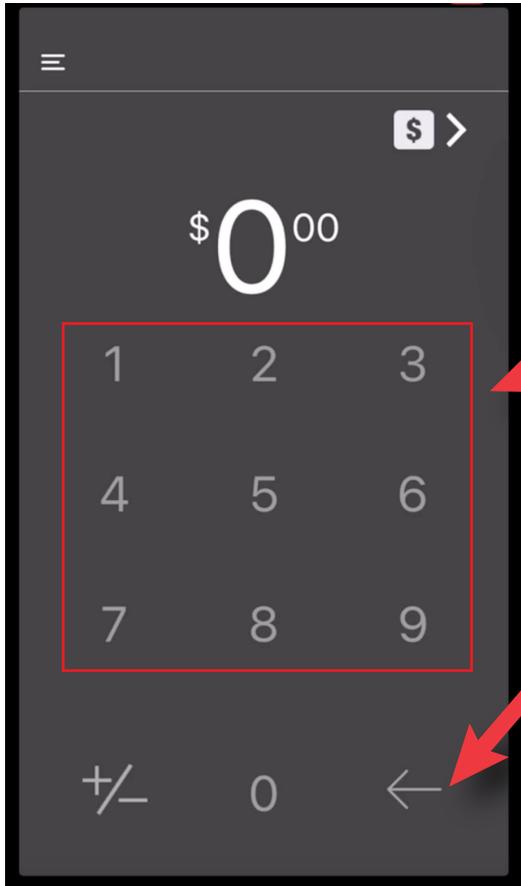
- On the first Sign In, the App will ask to access the microphone. If you are using a card reader that connects through the headphone jack, select ok.

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

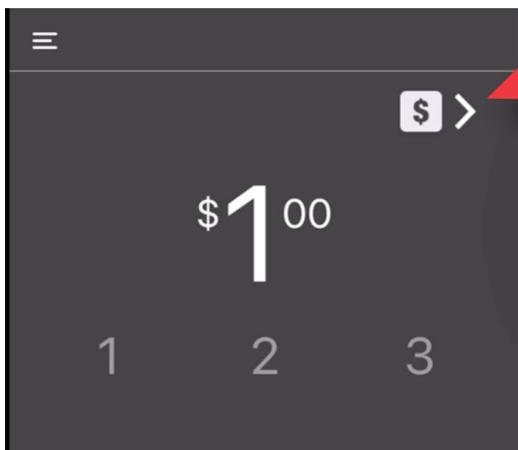
✓ MX™ Merchant - Express provides two ways to enter a card payment: keyed, or swiped.



To take a payment, first use the keypad to enter the amount.

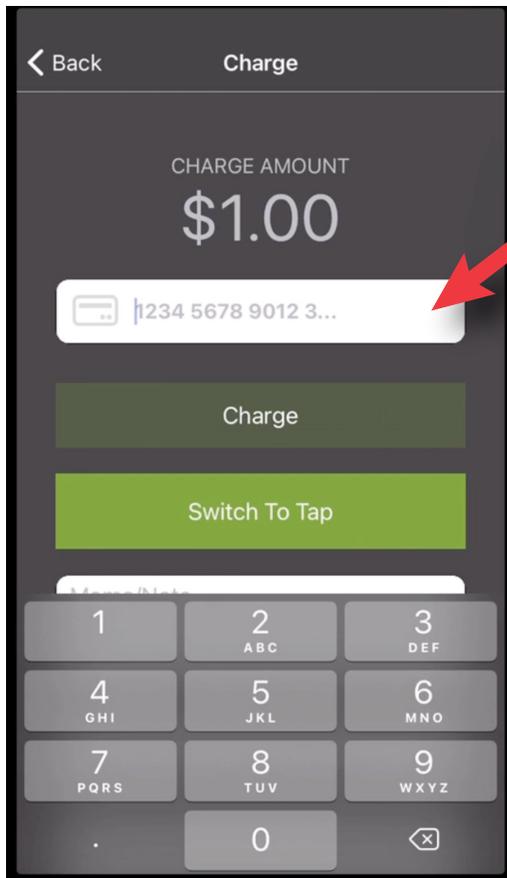
If a mistake is made press the bottom right button to start over or delete a single digit.

✓ With the amount due entered, press the dollar sign.



// PROCESSING A PAYMENT

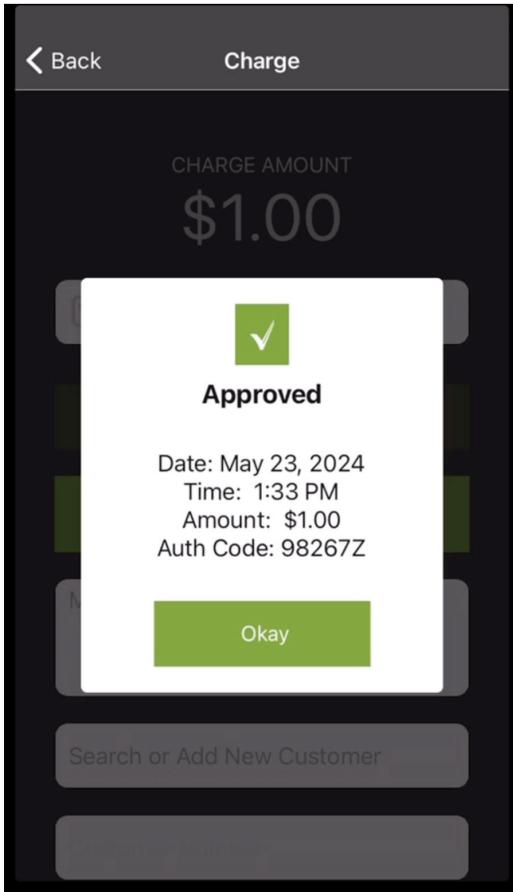
- ✓ If you are not utilizing a card reader you can manually enter the card information here.



- ✓ If a card reader is attached, the card information is 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

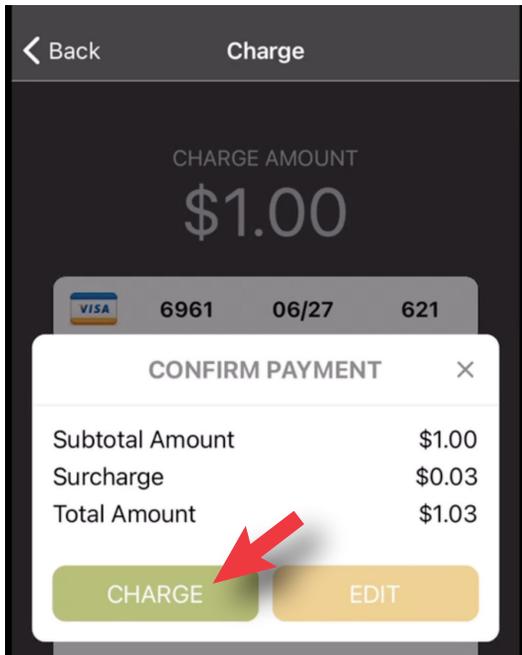
- After the credit card information is entered, press the 'Charge' button. When the charge is approved you will see this screen:



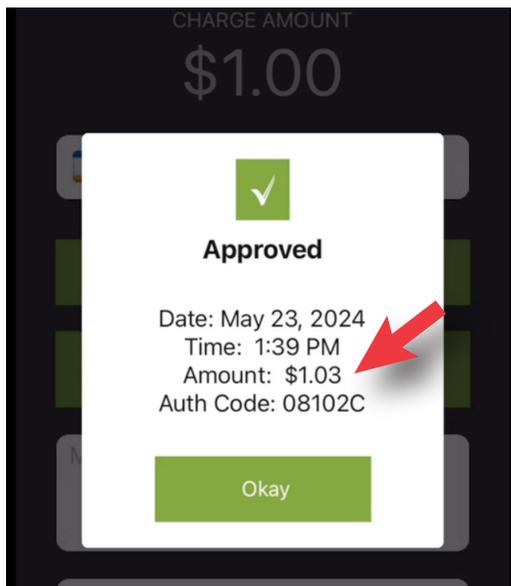
// PROCESSING A PAYMENT - SURCHARGE

- ✓ If you have surcharging enabled with MX™ Merchant - Advantage, the fee that you and your sales representative agreed upon will be applied to credit card transactions only.

Note: When manually inputting credit card information with surcharge activated, a “CONFIRM PAYMENT” pop up will appear, showing the subtotal, surcharge amount, and total amount. Select “CHARGE” to process the payment.

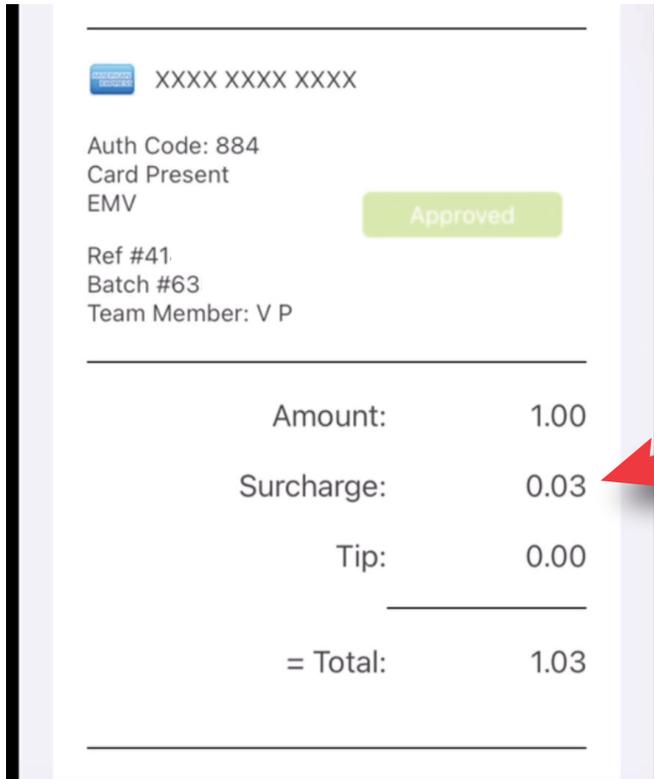


- ✓ The surcharge amount will automatically be applied to the amount on the “Approved” screen as shown below:



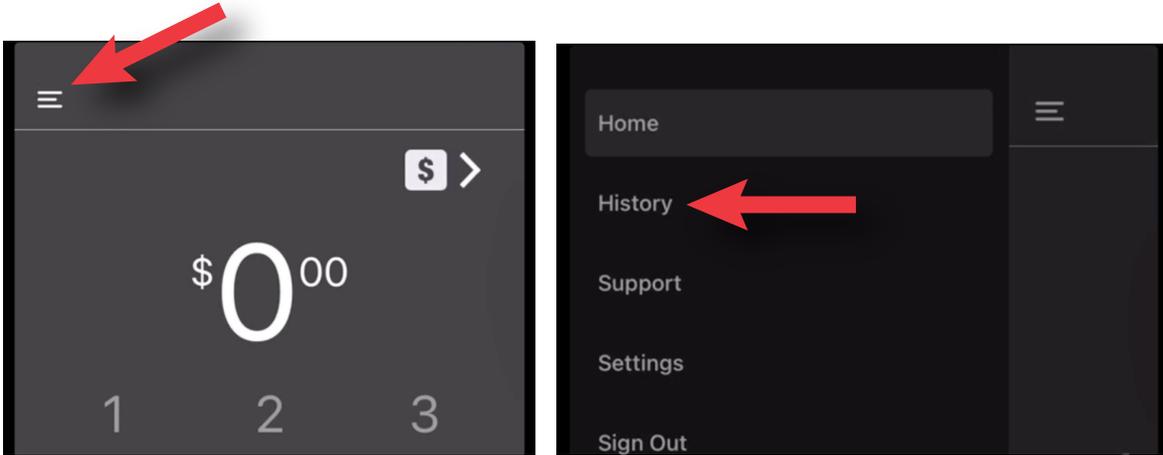
// PROCESSING A PAYMENT - SURCHARGE

✓ The surcharge amount will also be shown on the receipt:

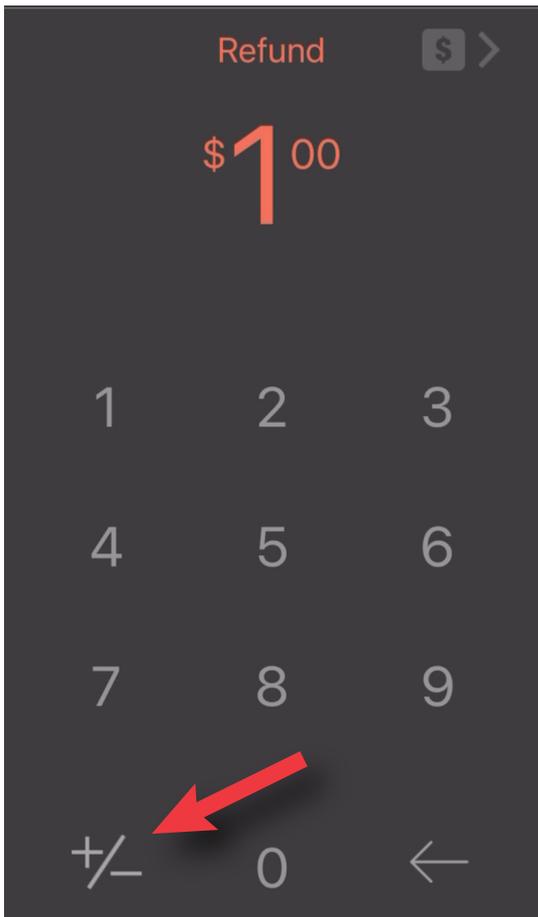


// PROCESSING A RETURN

- There are two ways to process a return on MX™ Merchant - Express. You can either locate the transaction on **history** from the menu and return/void.

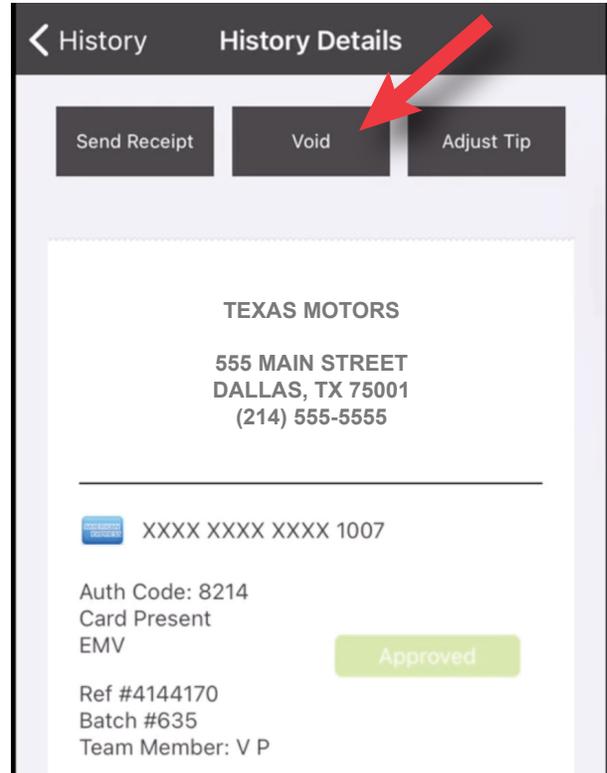
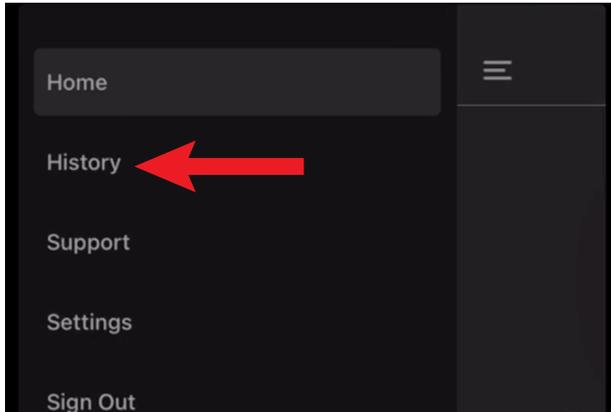


- Or on the keypad tap the +/- key and enter the return amount.



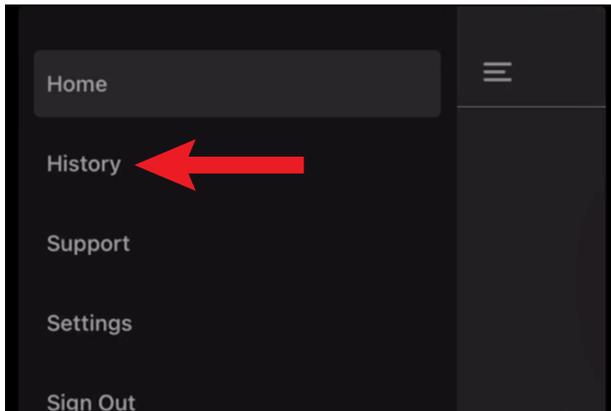
// PROCESSING A VOID FOR OPEN BATCH TRANSACTIONS

- From the menu go to **History** and locate a payment to be voided, then press **Void**. Note that this is not for settled sales.



// MENU

- **History** provides a list of payments and batches with status. Payments are listed by day with payment and tip total provided by date. **History** is where you can view and send receipts, void and return payments, and adjust tip amounts.

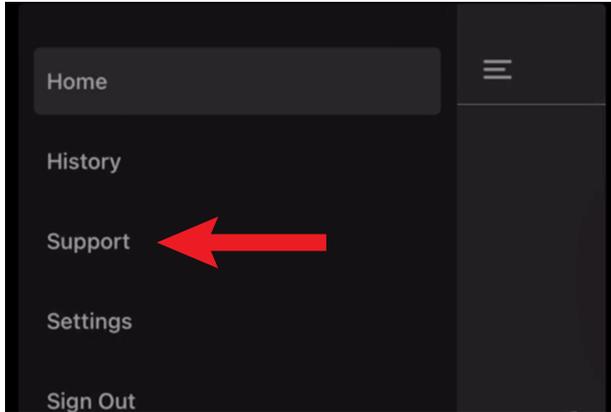


• Receipts:

- 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 one or enter a new mobile number.
- Printed receipts are printed by selecting print. The receipt prints to a connected WiFi or Bluetooth Printer.

// MENU

- Settings allows you to change and adjust various components of MX™ Merchant- Express, such as location, signature, tips, printers, and more.



Location:

Location displays the DBA and MID of all merchants associated with current sign on. The selected merchant (DBA with a checkmark), 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. To 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**.

// MENU

✓ 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 check mark 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 check mark 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.

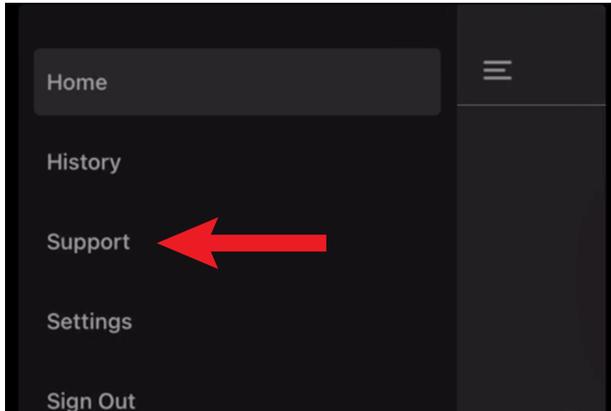
Advanced:

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

- ✓ **Support** gives information on how to contact customer support. 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.



- ✓ **Sign Out** allows you to sign out of the App if you tap Sign Out. The current user will be signed out and you will be returned to the Sign In screen.

