

MOBILE CHIP READER (CARDCONNECT PRO) – ORDERING, SW SETUP, ENABLING ON IPAD

Mobile Chip Readers are available for purchase through Lee Campo at Cardconnect Pro. Pricing is listed on the [order form](#). In order to integrate the mobile chip readers with SmartWare, the gateway for processing credit cards needs to be changed from Authorize.net to ePN. Cardconnect Pro will manage that transition. Using ePN as the gateway eliminates the need to update the password every 60 days. FBO's are responsible for canceling the existing Authorize.net account after the gateway has been transitioned to ePN. See below for more details.

CONTENTS

Mobile Chip Reader (Cardconnect Pro) – Ordering, SW Setup, Enabling on iPad	1
Ordering Process	1
SmartWare Setup	2
Enable Device on the iPad	4
Order Form	8

ORDERING PROCESS

1. Send completed, [signed order form](#) to lcampo@cardconnectpro.com or fax it to 877-609-7766.
2. Once the order form has been received , you will receive an email message from transactions@eprocessingnetwork.com on behalf of Cardconnect Pro.
3. This message will contain a secure Invoice link. The Invoice will provide you with your EPN Username/Account number, EPN Temporary password and EPN Restrictkey. Also, it provides you the ability to submit your credit card information online securely to order your reader(s).
4. Once you submit your payment, your reader(s) will be shipped within 2 to 3 business days.
5. Once the readers are received, proceed to [SmartWare Setup](#).

SMARTWARE SETUP

1. Go to Setup Franchise > Setup
2. Click on Options
3. Click on Territories
4. Click on the Edit button to open the Territory information

The screenshot displays the SmartWare Setup interface for 'Mr Appliance Training'. The left sidebar contains a navigation menu with the following items: Calendar & Tasks, Scripting, Dashboards, Accounting, Administrative, Communication, Customer, Dispatch, Material, Reports, Setup Brand, Setup Franchise, Setup (highlighted with a yellow callout '1'), User Defined Values, and Work Order.

The main content area is titled 'Mr Appliance Training' and is divided into two sections: 'Franchise' and 'Territories'.

The 'Franchise' section has a red header and contains a form with the following fields: Name, Franchisee Name, Franchise Consultant, Primary Territory, Return Location, and Country. A dropdown menu is open, showing a list of options including Accounting Class Codes, Address, Attachments, Bank / CC Accounts, Tasks Category, Calendars, Communication, Contact Topic, Contract, Disclaimers, Dispatch Codes, Employees, Employee Goals, Location, Manufacturers, Notes, Options (highlighted with a yellow callout '2'), Phone Lead Source, Phone System Setup, Postal Codes, Part Margin Tool, Secondary Lead Source, Service Types, SmartWare Billing Summary, SMS Setup, Specialty Scale, Tax Authority, Territories, and Zones. A yellow callout '3' points to the 'Territories' option in the dropdown.

The 'Territories' section has a red header and contains a table with the following columns: Territory and Active. The table has one row with the value 'MRA Training Territory' and a checked checkbox in the Active column. A yellow callout '4' points to the edit icon (pencil) next to the 'MRA Training Territory' row. Below the table is a search box and a status indicator '1 - 1 displayed , 1 in total'.

5. In the Payment Gateway field, select ePN from the drop-down.
6. In the Gateway Account Number field, enter the ePN account number.
7. In the Gateway Restrict Key field, enter the ePN Restrict Key.
8. Click on 'Save'.
9. Instruct Techs to do an Office Sync on the iPad to get new CC processing connection.

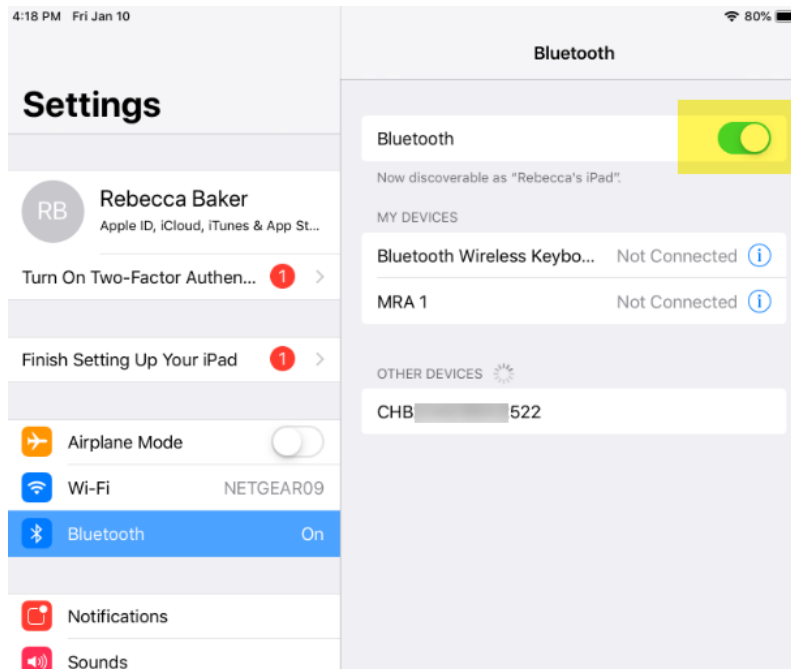
Territories

Save Discard

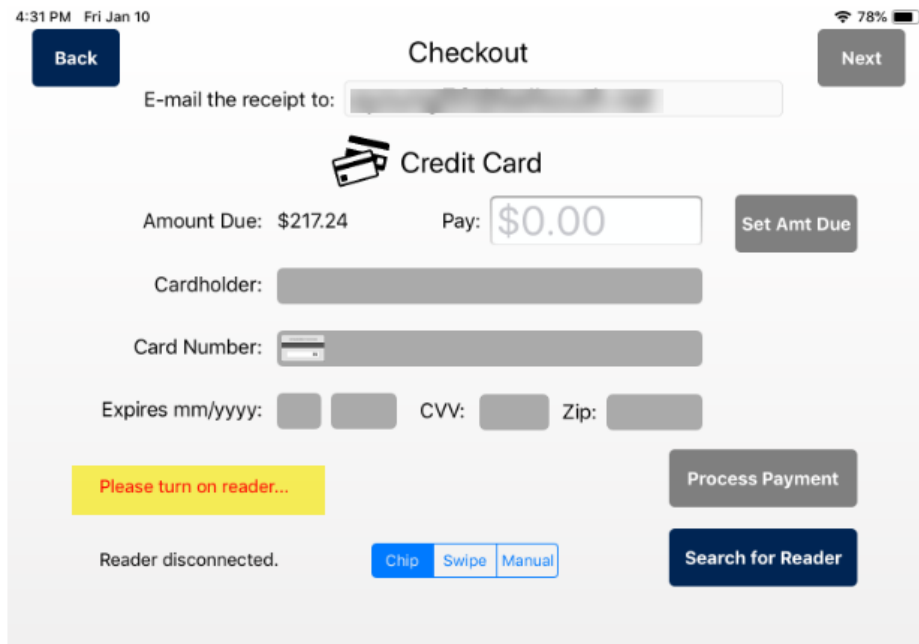
Name:	MRA Training Territory
Address:	Office - 1010 N. University Parks Dr
Office Inventory Location:	
Phone Number:	Main Phone - 5425233232
Email Address:	
Territory Time Zone:	(UTC-06:00) Central Time (US & Canada)
Accounting Class Code:	
Company Code:	QBO
QuickBooks Company Name:	
5 Payment Gateway:	ePN
6 Gateway Account Number:	10 21
7 Gateway Restrict Key:	ZRa2r QHe Hide Password
Marcone Username:	140873
Marcone Password: Show Password
Shipping Method:	UPS Ground
Net Promoter Score:	
License Number:	www
Default Price Book:	Basic
Confirmation Email Info:	<input type="checkbox"/>
Specialty Code:	<input type="checkbox"/>
Active:	<input checked="" type="checkbox"/>

ENABLE DEVICE ON THE IPAD

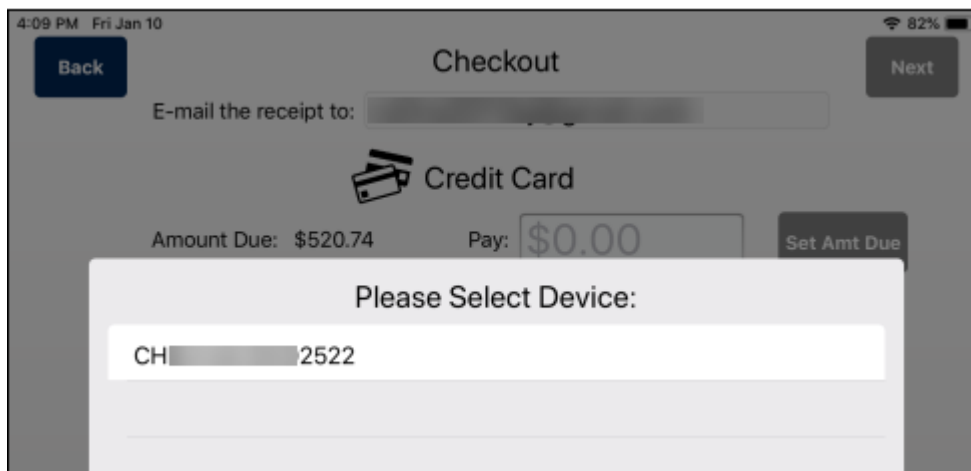
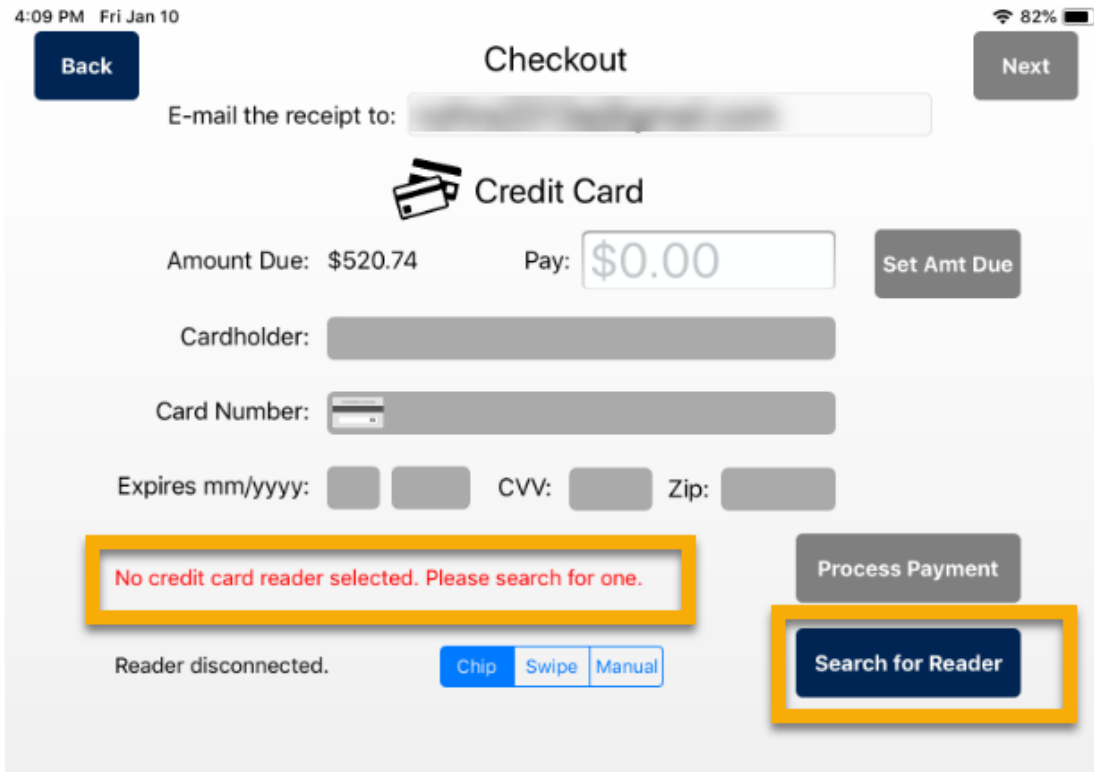
1. Do an Office Sync to get updated credit card processing info.
2. On the iPad, under settings, turn on Bluetooth.



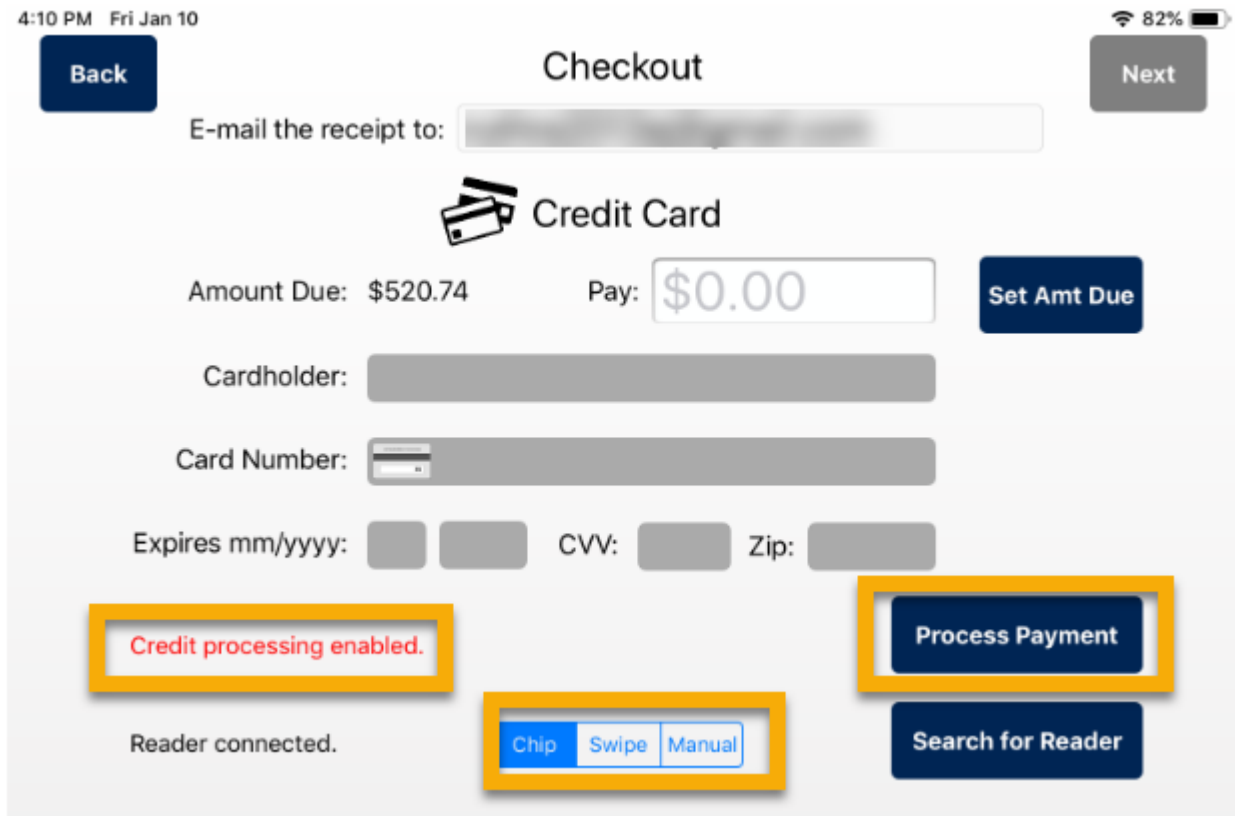
3. On the payment screen of the work order, select Credit Card.
4. Turn on the card reader with the power button located on the side. A blue light will begin flashing on the reader.



5. If there is red message stating “No credit card reader selected. Please search for one.”, click on the Search for Reader button. Select the device from the list. This typically happens for the initial connection to the app. Subsequent uses should connect automatically when the reader is turned on.



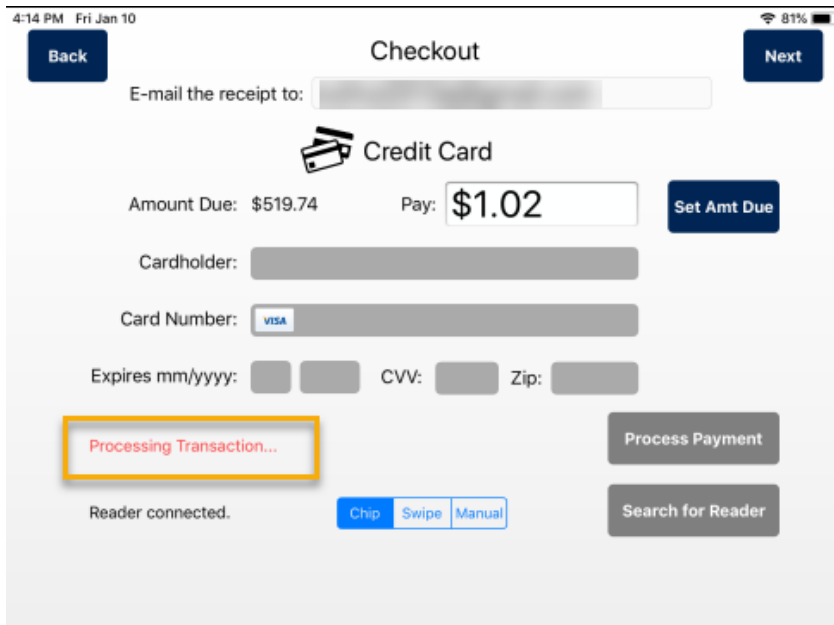
6. Once connected, the red message will change to say 'Credit processing enabled.'



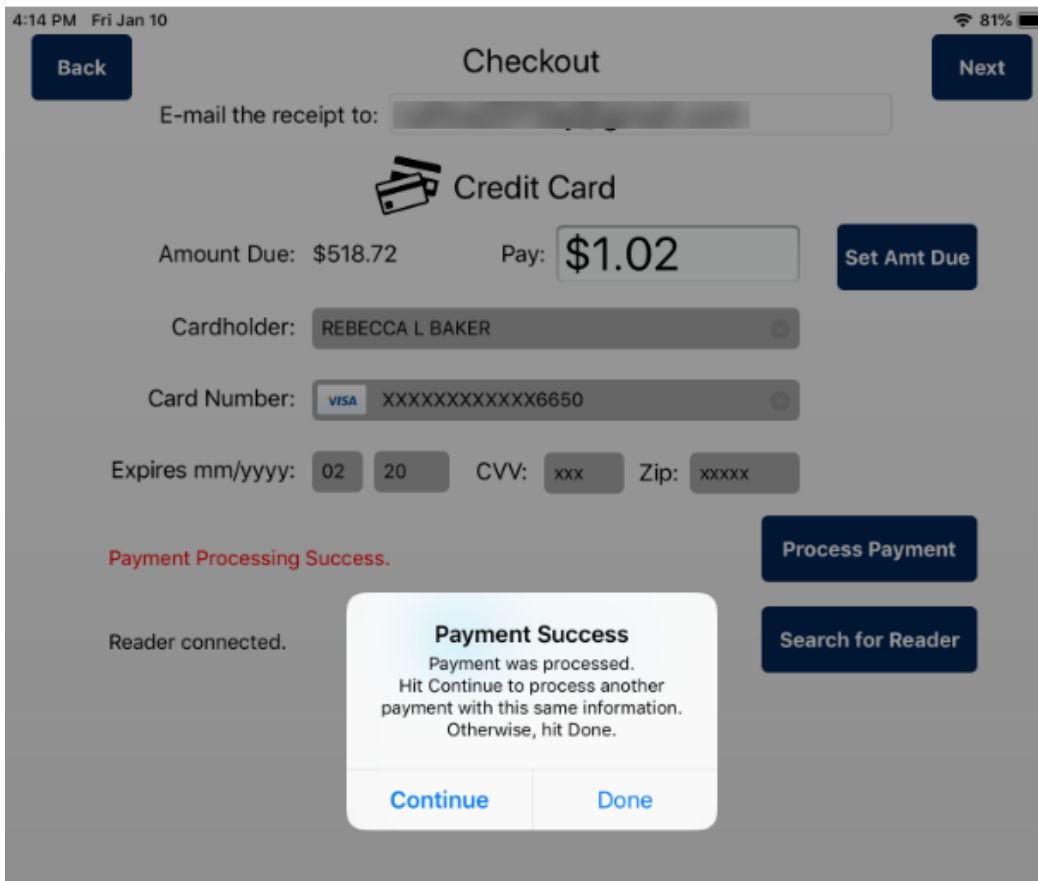
7. Select the processing method: Chip, Swipe or Manual. Chip is the default method. The chip method can also be used for Apple Pay, Google Pay and Tap-and-Go. Tap-and-Go cards have the symbol circled below. For Apple Pay, Google Pay and Tap-and-Go, simply hold the card or device near the reader and select the Process Payment button. For cards with a chip, insert card as shown. A pin number is not required.



8. After pressing the Process Payment button, the message will read "Processing Transaction".



9. Once payment has been processed, a message will pop up saying "Payment Success". Hit "Done" to complete transaction.



For technical issues, please contact SmartWare Support at smartwaresupport@servantsystems.com or 855-999-4003.



CARDCONNECT PRO MOBILE CHIP READER ORDER FORM

IN ORDER FOR CARD READERS TO WORK THROUGH SMARTWARE, YOU WOULD CONVERT YOUR CURRENT GATEWAY FROM AUTHORIZENET TO THE EPROCESSINGNETWORK (EPN) GATEWAY. YOUR EXISTING CARDCONNECT PRO MERCHANT ACCOUNT WOULD REMAIN THE SAME.

COSTS ASSOCIATED WITH THE CONVERSION:

EPROCESSINGNETWORK (EPN) GATEWAY COST: \$15.00 MONTHLY GATEWAY FEE, \$0.05 PER TRANSACTION, \$36.00 ANNUAL PCI FEE

MOBILE CARD READER COST (BBPOS BLUETOOTH CHIP READER): \$119 PLUS SHIPPING AND SALES TAX PER READER (SWIPE, CHIP & NFC CONTACTLESS VERSION) THIS HARDWARE IS PROVIDED THROUGH EPN AND INCLUDES A 6 MONTH WARRANTY.

CHECK ALL THAT APPLY AND COMPLETE ALL SECTIONS BELOW:

ONCE COMPLETED, PLEASE SEND THIS FORM VIA EMAIL TO LCAMPO@CARDCONNECTPRO.COM OR FAX IT TO 877-609-7766.

ONCE RECEIVED, YOU WILL RECEIVE A SUBSEQUENT EMAIL MESSAGE FROM TRANSACTIONS@EPROCESSINGNETWORK.COM. THIS IS A SECURE **INVOICE** LINK THAT PROVIDES YOU WITH THE ABILITY TO SUBMIT YOUR CREDIT CARD INFORMATION ONLINE TO ORDER YOUR READER(S). ONCE YOU SUBMIT YOUR PAYMENT, YOUR READER(S) WILL BE SHIPPED WITHIN 2 TO 3 BUSINESS DAYS. **ALSO, THE INVOICE PROVIDES YOU WITH YOUR WITH YOUR EPN ACCOUNT NUMBER, EPN TEMPORARY PASSWORD AND EPN RESTRICTKEY REQUIRED FOR YOUR SMARTWARE SET UP.**

_____ PLEASE SET UP MY EPN GATEWAY ACCOUNT

_____ I WOULD LIKE TO ORDER _____ BBOS MOBILE READER(S)

(Specify the number of readers)

BUSINESS NAME: _____ PHONE: _____

SHIPPING ADDRESS: _____

CONTACT NAME: _____ EMAIL: _____

SIGNATURE: _____ DATE: _____