



HOW TO TAKE PAYMENTS WITH THE CONVERGE MOBILE APP?

CONVERGE MOBILE USER GUIDE - **ANDROID**



VERSION 3.0

CONTACT

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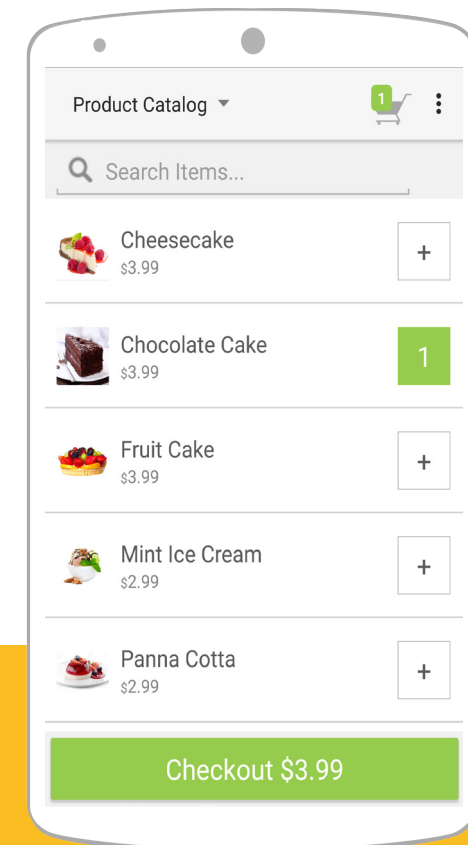


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GET STARTED WITH CONVERGE MOBILE

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What is Converge Mobile and why should I get it for my business?

Converge Mobile is a free mobile app that empowers you to accept credit, debit and cash payments anywhere, anytime. Once connected with our affordable card reader, it turns your iOS or Android smartphone or tablet to a secure Point of Sale (mPOS) solution. You can then process chip card (EMV), magstripe, and contactless ("tap and pay" via card or mobile wallet, such as ApplePay or AndroidPay) transactions.

Converge Mobile is an extension of Converge, an omni-commerce solution that allows you to process payments in multiple environments, including in-store, mobile, back office mail/phone order, and e-commerce. You can access Converge using the web application at <http://www.convergepay.com>. There, you can view additional payment management and reporting tools.



What do I need to process transactions with Converge Mobile?

Gather everything you need to jump start your payment processing.

1. An Active **Converge Mobile account** with valid sign-in credentials.

Please note, if you do not have Converge Mobile sign-in credentials yet, refer to your Welcome Kit for the training phone number to get help.

2. A supported **card reader**, such as the Ingenico RP457c, iCMP, or MagTek uDynamo, aDynamo or BulleT card reader.

Please note, certain card readers are in selected markets only. For example, RP457c card reader is not available in Canada.

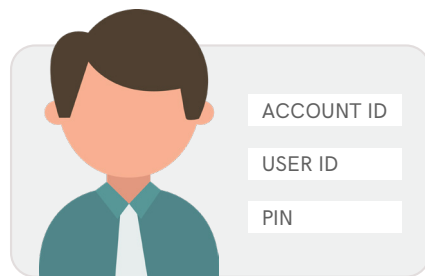
3. An **Android (5.0 and above required) smartphone or tablet** with internet connectivity.

4. The **Converge Mobile app** downloaded on your mobile device.

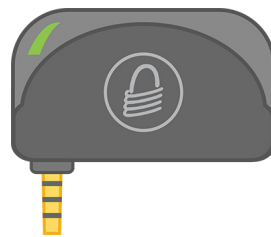
Please note, if you are an iOS user, download [Converge Mobile iOS](#) from Apple App Store and refer to the [iOS User Guide](#).

5. A supported Bluetooth receipt printer for printing receipt, such as Star SM220i and Star SMT300i.

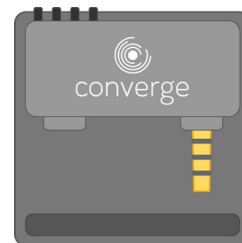
Please note, if you don't have a receipt printer yet, you can email receipt to your customers in the app.



Converge Mobile account



MagTek uDynamo



Ingenico RP457c



Ingenico iCMP



Ingenico Moby/M70







Android mobile device

What card readers does Converge Mobile support?

In the United States, Converge Mobile currently supports the **Ingenico iCMP** PIN pad via **Bluetooth** connectivity and the **Ingenico RP457c** card reader using **Bluetooth** or **audio jack**. You can swipe, insert or tap the card, with both card readers. Additionally, Converge Mobile also supports MagTek **uDynamo** and **iDynamo** card readers via **audio jack**, and **MagTek BulleT** card reader via **Bluetooth**. You can swipe magstripe cards with those MagTek card readers.

Ingenico iCMP PIN pad

The iCMP has a touch keyboard for data entry. On the right side of the keyboard, there are a set of buttons:

-  function **menu** button
-  **decline** button
-  **back** button
-  **confirmation** button

Below the iCMP screen, there are a set of buttons (F1, F2, F3, F4) that help you navigate through content on the screen.



On the right side of the iCMP, you'll see the **power button** and a **USB port** for charging and connecting the device to a computer.



Ingenico RP457c card reader

The Ingenico RP457c card reader connects with your mobile device via audio jack or Bluetooth. It accepts magstripe cards, chip cards and NFC/contactless payments, including mobile wallets like Apple Pay.



RP457c front



RP457c back

MagTek uDynamo, aDynamo and BulleT card readers

The MagTek uDynamo and aDynamo card readers connect with your mobile device via audio jack, while the BulleT card reader connects via Bluetooth. You can swipe magstripe cards with those MagTek card readers.




MagTek uDynamo / aDynamo



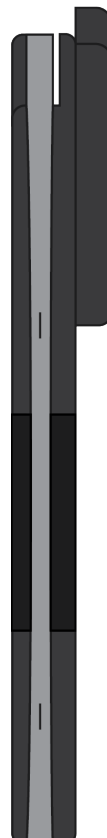
MagTek BulleT

Ingenico Moby/M70 card reader

The Moby/M70's **front** is a touch screen Android device running Converge Mobile. The **right side** of the Moby/M70 has its power button  and volume controls. The **bottom** of the Moby/M70 features a microphone and ports for security locking, power, Micro USB, and Headphones. The **top** of the Moby/M70 is an RP457c card reader ready for swipe, EMV chip, or contactless payments. The **back** of the Moby/M70 features a connector for Ingenico docking bays.



Moby/M70 front



Moby/M70 right side



Moby/M70 back



Moby/M70 left side



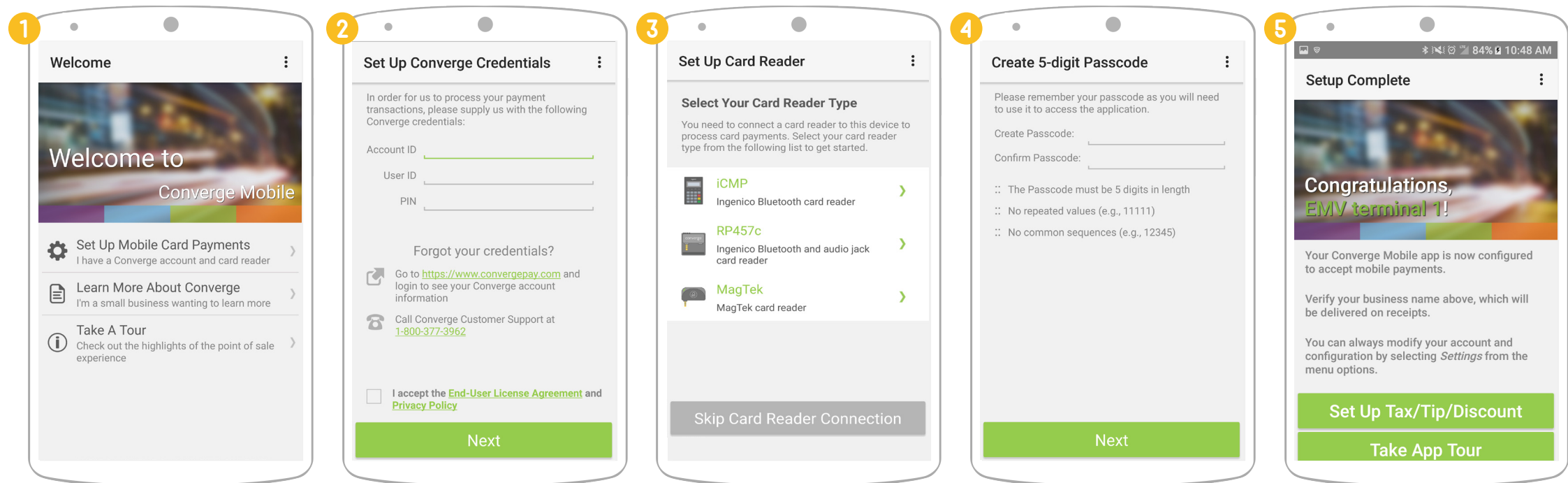
Moby/M70 top



Moby/M70 bottom

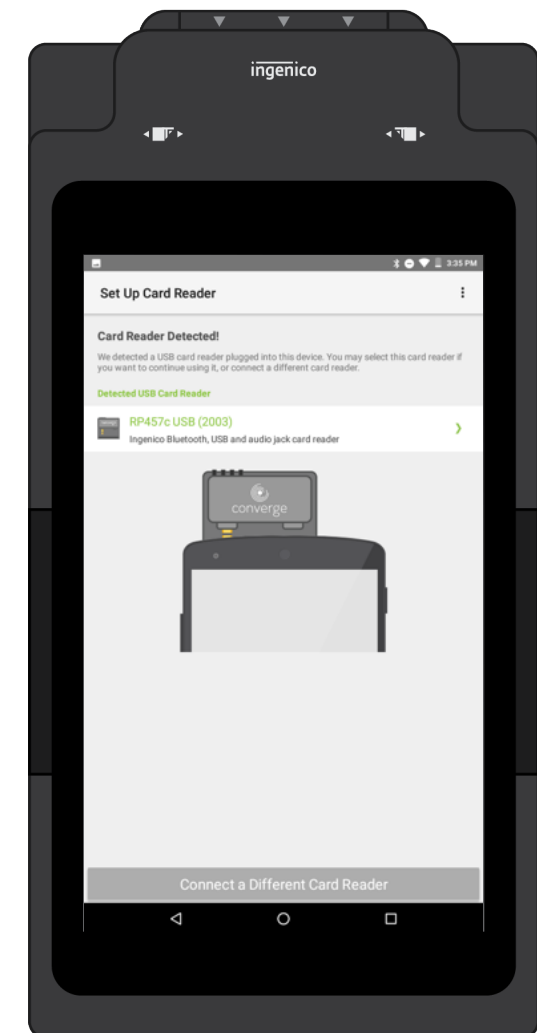
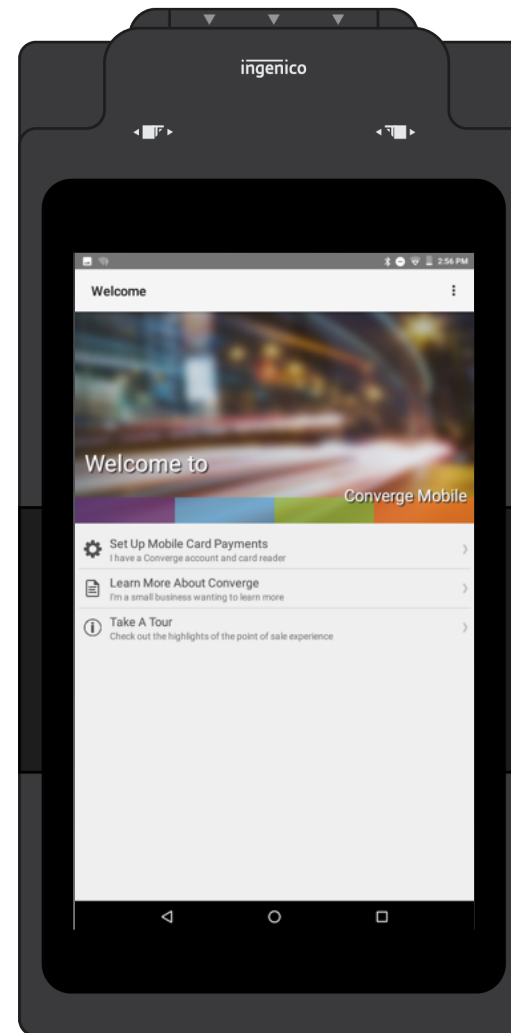
How do I set up Converge Mobile during first-time use?

1. On the Converge Mobile **Welcome** screen, select **Set Up Mobile Card Payments**.
2. Enter your Account ID, User ID, and PIN to log in. Accept the **End-User License Agreement (EULA)** at the bottom to proceed.
3. On the **Set Up Card Reader** screen, select your card reader type from the list, then follow the step-by-step instructions to connect it with your Android device. For details, refer to [page 8](#) for iCMP, [page 10](#) for RP457c, and [page 12](#) for MagTek.
4. Create your app-unlock passcode that will be used to securely and quickly access your Converge Mobile app.
5. Once your credentials are validated, you will see your business name on the **Setup Complete** screen. Make sure it is correct since it will show up on the receipts. Touch **Set Up Tax/Tip/Discount** to configure transaction settings, select **Take App Tour** to learn key features of Converge Mobile, or simply touch **Finish** to begin processing transactions.



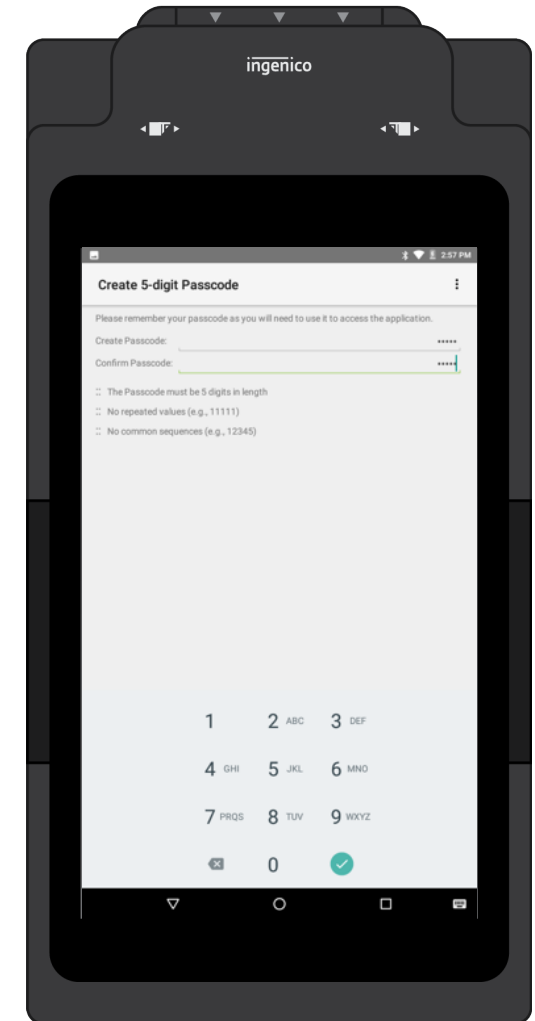
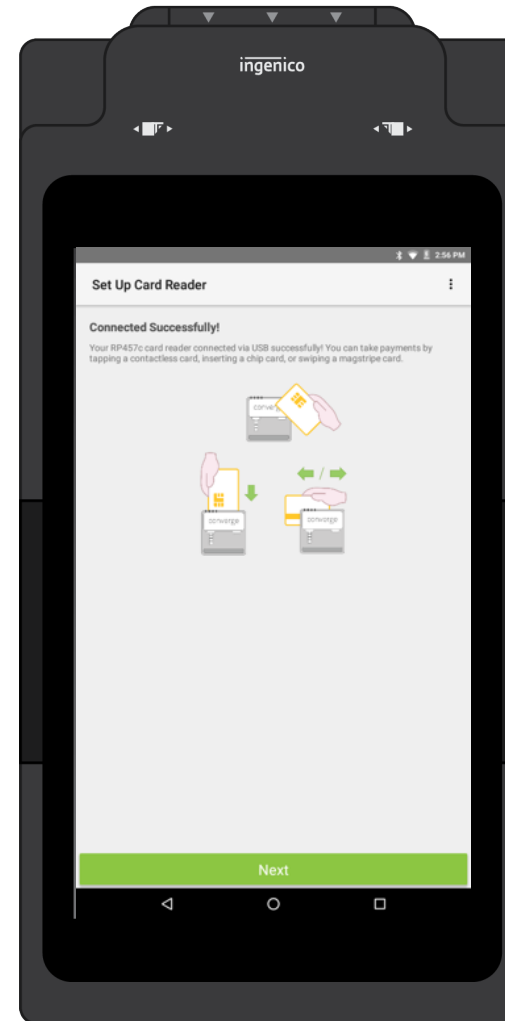
How do I set up a Moby/M70 device during first-time use?

1. Turn on the power of your Moby/M70 and open the Converge Mobile app. While installing, Converge Mobile will ask for permissions to access your device's microphone, location, and enable Google Play Protect. Accept these permissions.
2. On the Converge Mobile Welcome screen, select Set Up Mobile Card Payments.
3. Enter your **Account ID**, **User ID**, and **PIN** to log in. Accept the End-User License Agreement (EULA) at the bottom to proceed.




4. Your Moby/M70 will automatically detect its RP457C Card Reader and ask if you would like to connect. Touch **Connect** to continue.
5. Once your Moby/M70 finishes connecting to its card reader, Create your app-unlock passcode that will be used to securely and quickly access your Converge Mobile app.
6. Once your credentials are validated, you will see your business name on the **Setup Complete** screen. Make sure it is correct since it will show up on the receipts. Touch **Set Up Tax/Tip/Discount** to configure transaction settings. Select Take App Tour to learn key features of Converge Mobile, or simply touch **Finish** to begin processing transactions.

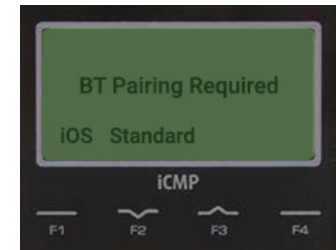
Refer to pg. 13 for more information on processing transactions with an RP457c.



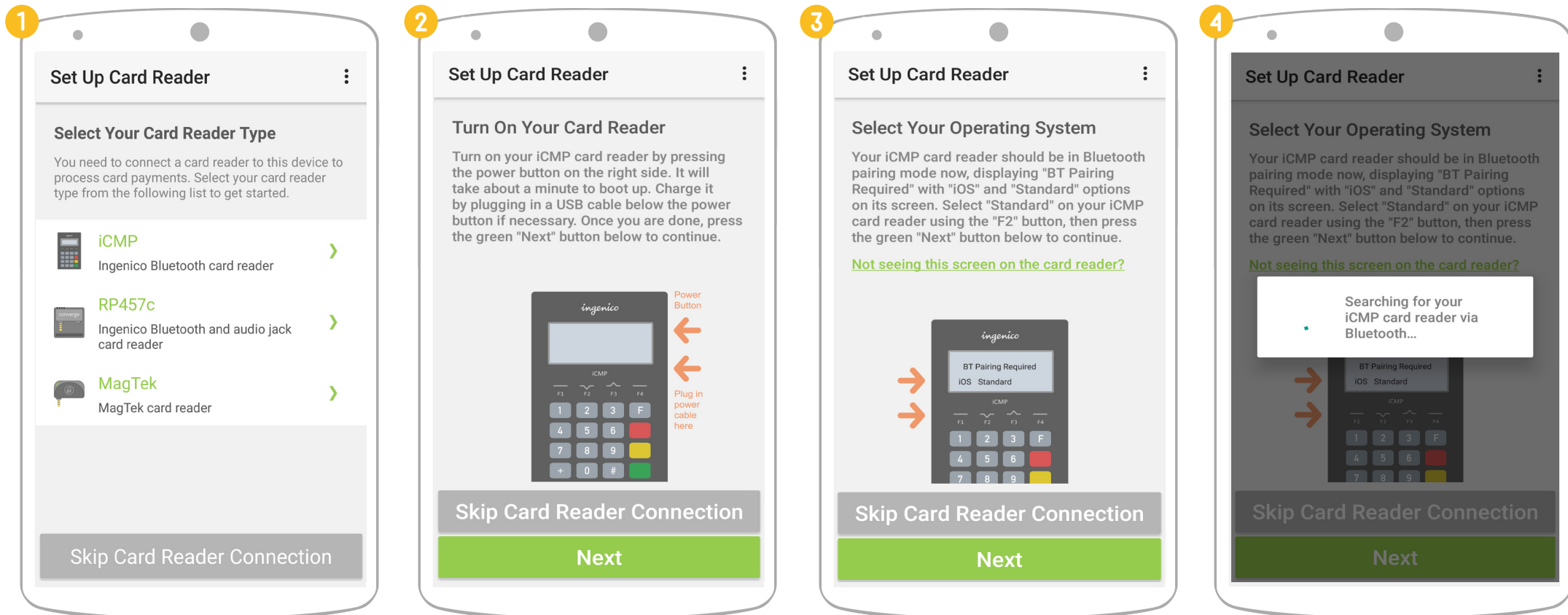
How do I connect an iCMP PIN pad during first-time setup?

During first-time setup, follow **Set Up Card Reader** wizard to connect your iCMP PIN pad via Bluetooth. You can skip for now by selecting **Skip Card Reader Connection** at the bottom. You can go to **Menu** → **Settings** → **Card Reader** at any time to connect a new device.

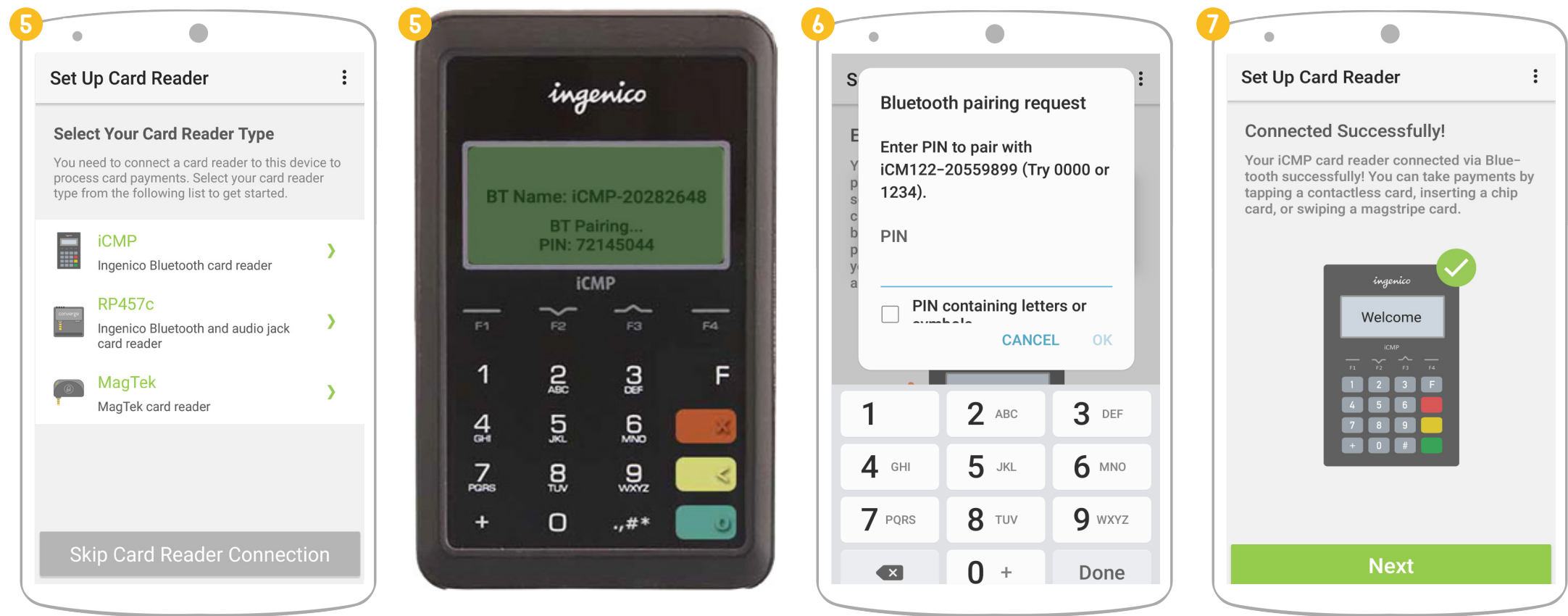
1. On the **Set Up Card Reader** page, select **iCMP** from the supported card reader type list.
2. Power on your iCMP and charge it if necessary.
3. On the iCMP, select **Standard** connection option for Android devices by tapping the **F2** button.  button.
4. Wait for Converge Mobile to search for available Bluetooth devices.



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- 5. On the iCMP screen, a **Bluetooth pairing PIN** will show up.
- 6. Enter that pairing PIN into Converge Mobile when prompted.
- 7. The iCMP will pair with your Android device.

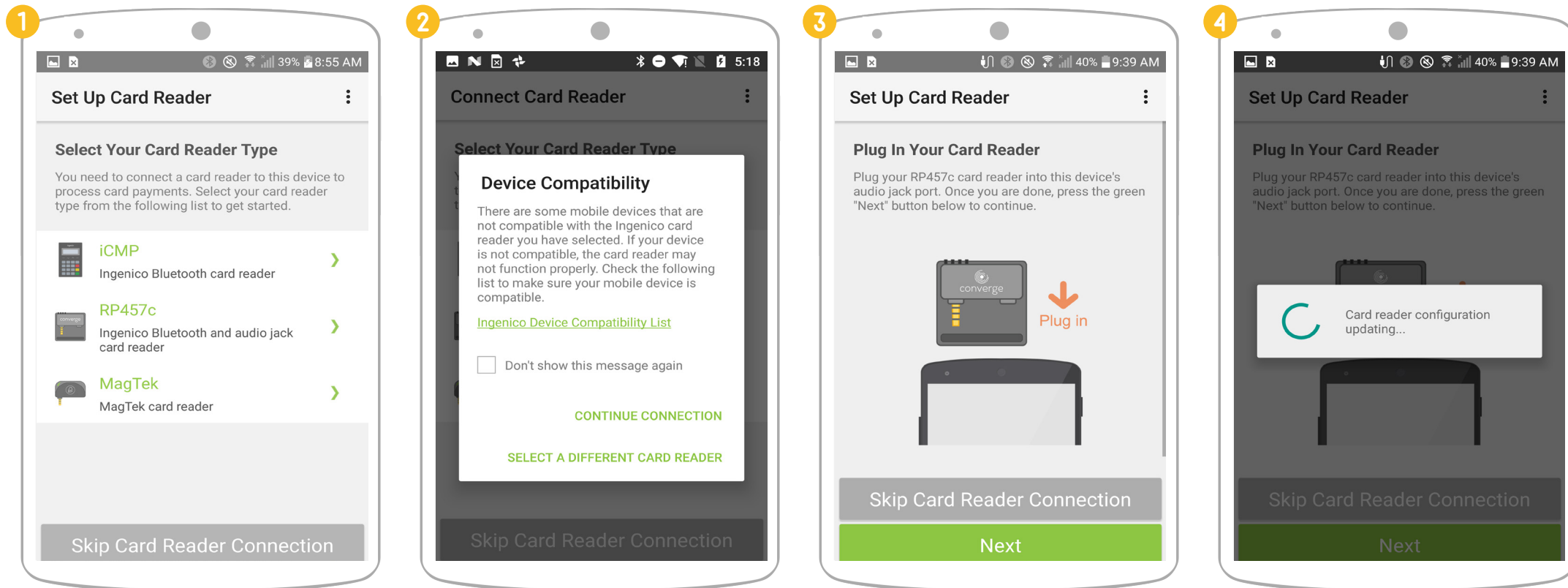


How do I connect an RP457c card reader during first-time setup?

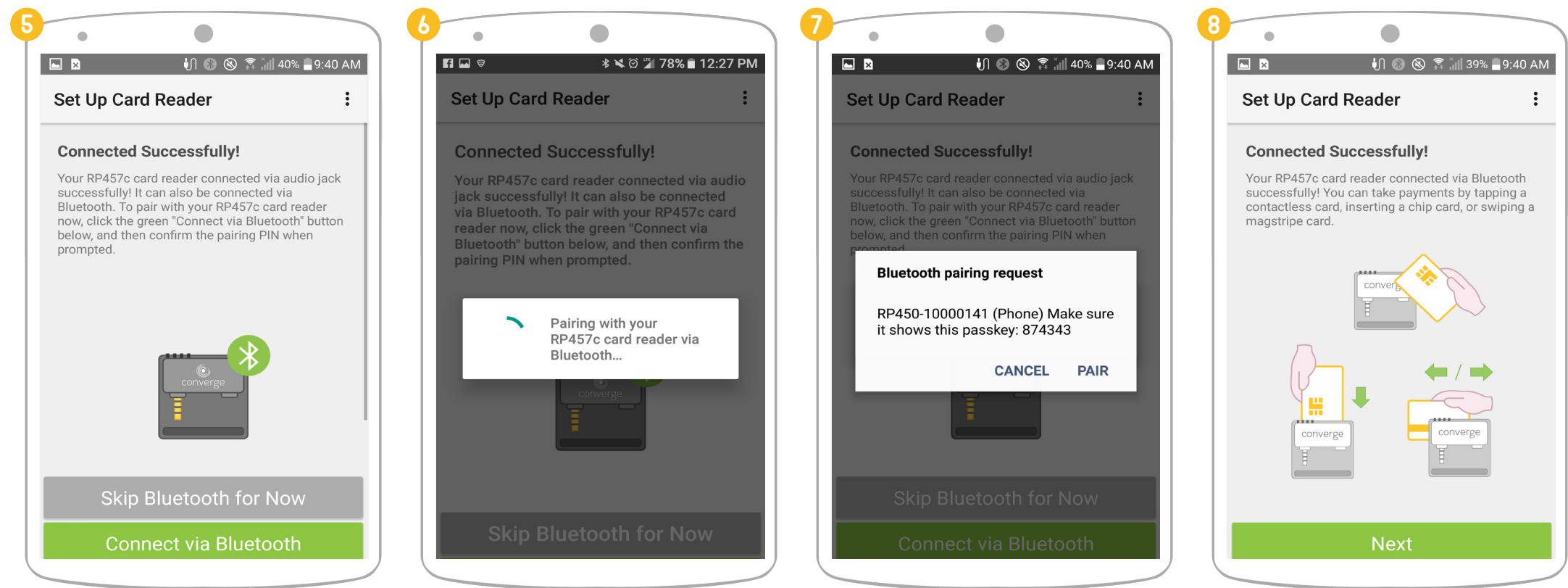
During first-time setup, follow **Set Up Card Reader** wizard to connect your RP457c card reader via audio jack or Bluetooth. You can skip for now by selecting **Skip Card Reader Connection** at the bottom. You can go to **Menu** → **Settings** → **Card Reader** at any time to connect a new device.

Please note, in order to connect your RP457c card reader via Bluetooth, you **MUST** establish an audio jack connection first.

1. On the **Set Up Card Reader** page, select **RP457c** from the supported card reader type list.
2. Some Android devices may have compatibility issues with the RP457c card reader. You can view [the complete list of compatible devices](#) or by clicking on the link shown in the app.



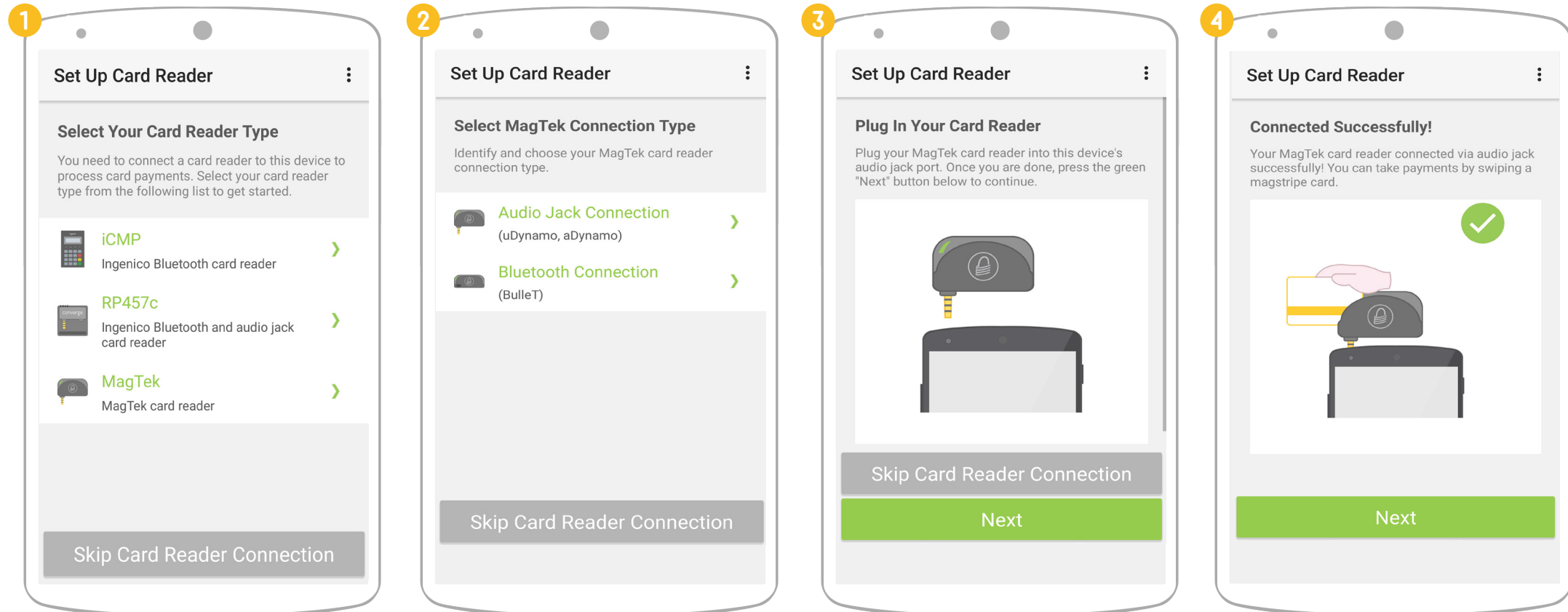
- 3. Plug your RP457c card reader into your Android device's audio jack port, then press the green **Next** button to continue.
- 4. Your Android device will start searching for the RP457c card reader and try establishing a connection with it.
- 5. Once it connects, you can start processing transactions with your RP457c connected via audio jack, or you can continue connecting your RP457c via Bluetooth, so that it doesn't need to be plugged in to your Android device.
- 6. Touch the green **Connect via Bluetooth** button on your Android screen to initiate Bluetooth pairing.
- 7. Confirm the Bluetooth pairing code once it appears.
- 8. If it connects successfully, you will see the **Connected Successfully** screen. Touch the green **Next** button to move on to app-unlock passcode setup step. If not, you can skip it for now and try Bluetooth pairing through the **Settings** menu later.



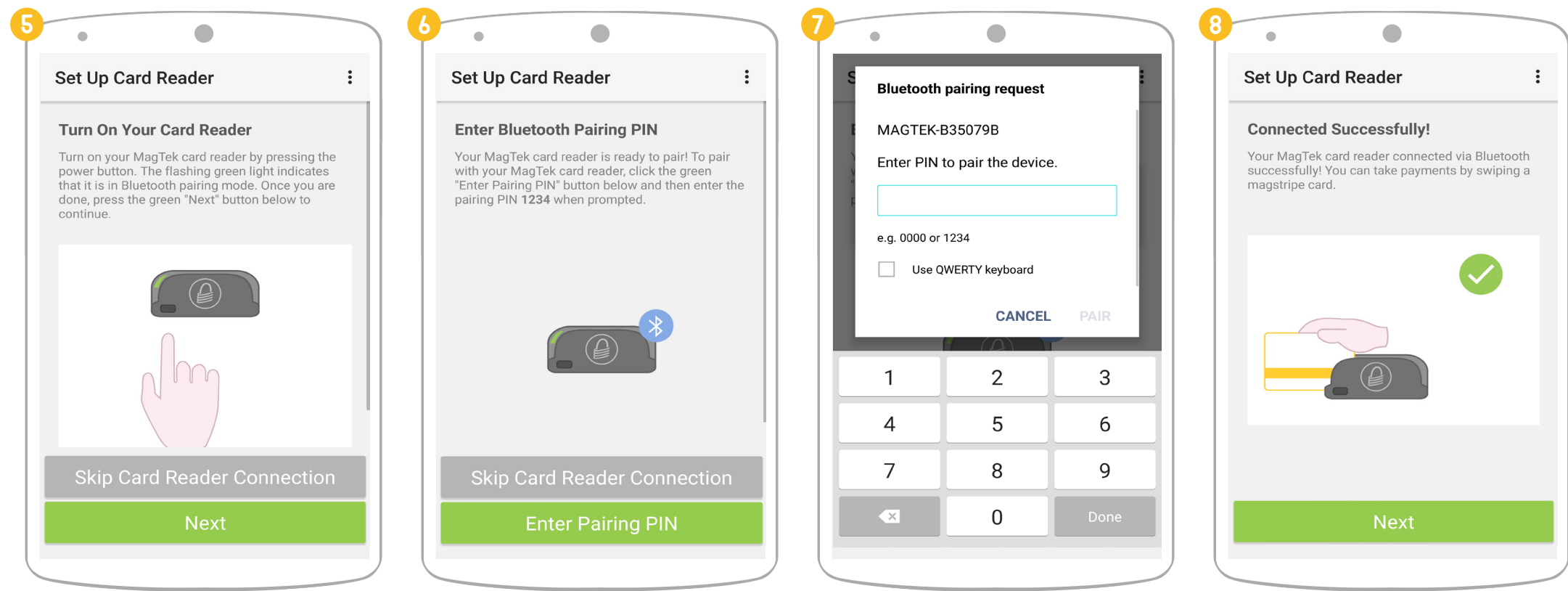
How do I connect a MagTek card reader during first-time setup?

During first-time setup, follow **Set Up Card Reader** wizard to connect your MagTek card reader via audio jack or Bluetooth. You can skip for now by selecting **Skip Card Reader Connection** at the bottom. You can go to **Menu** → **Settings** → **Card Reader** at any time to connect a new device.

1. On the **Set Up Card Reader** page, select **MagTek** from the supported card reader type list.
2. Different MagTek card reader models have different connection types. Select **Audio Jack Connection** if you have a MagTek uDynamo or aDynamo; otherwise, select **Bluetooth Connection** if you have a MagTek BulleT.
3. For **Audio Jack Connection**, plug the MagTek into your Android device's audio jack port, then press the green **Next** button to continue.






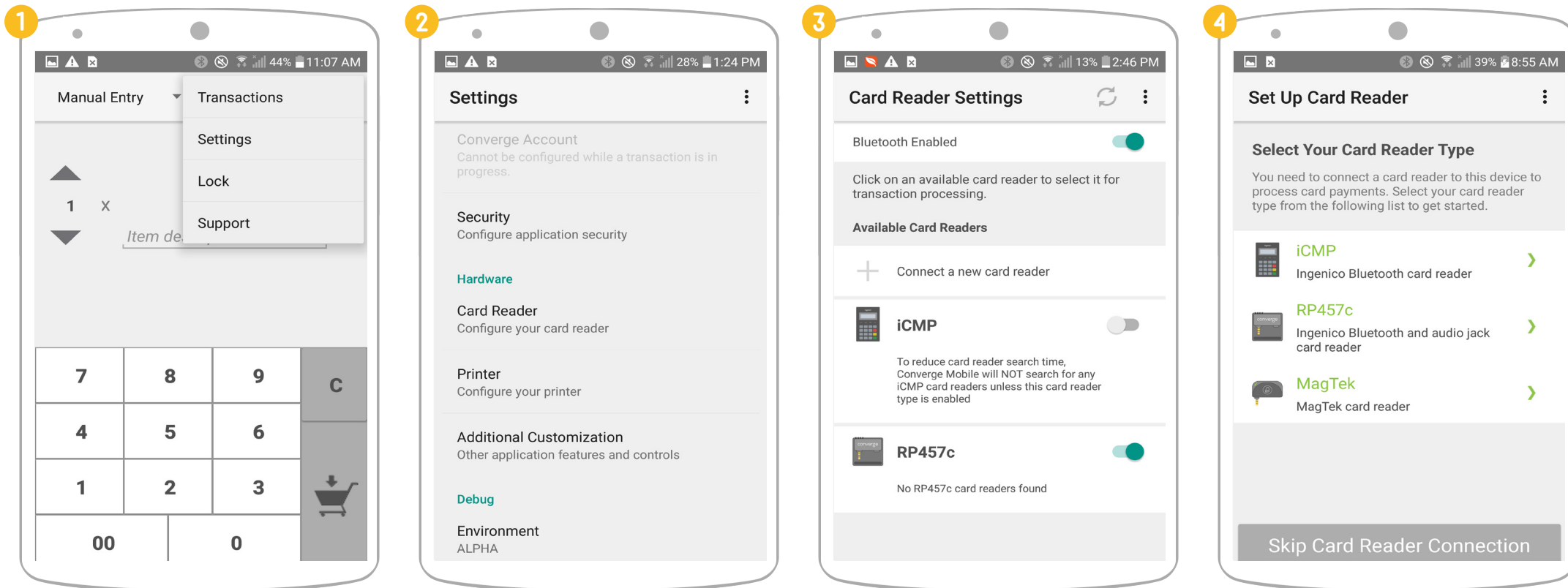
- 4. Once it connects, you can start processing transactions with your MagTek card reader by swiping magstripe cards.
- 5. For **Bluetooth Connection**, power on your MagTek card reader. The flashing green light indicates it is in Bluetooth pairing mode.
- 6. Wait for Converge Mobile to search for available Bluetooth devices. Once found, touch the **Enter Pairing PIN** button to continue.
- 7. Enter that pairing PIN **1234** into Converge Mobile when prompted.
- 8. The MagTek will pair with your Android device. You can start processing transactions with your MagTek card reader by swiping magstripe cards.



How do I connect a card reader from Settings?

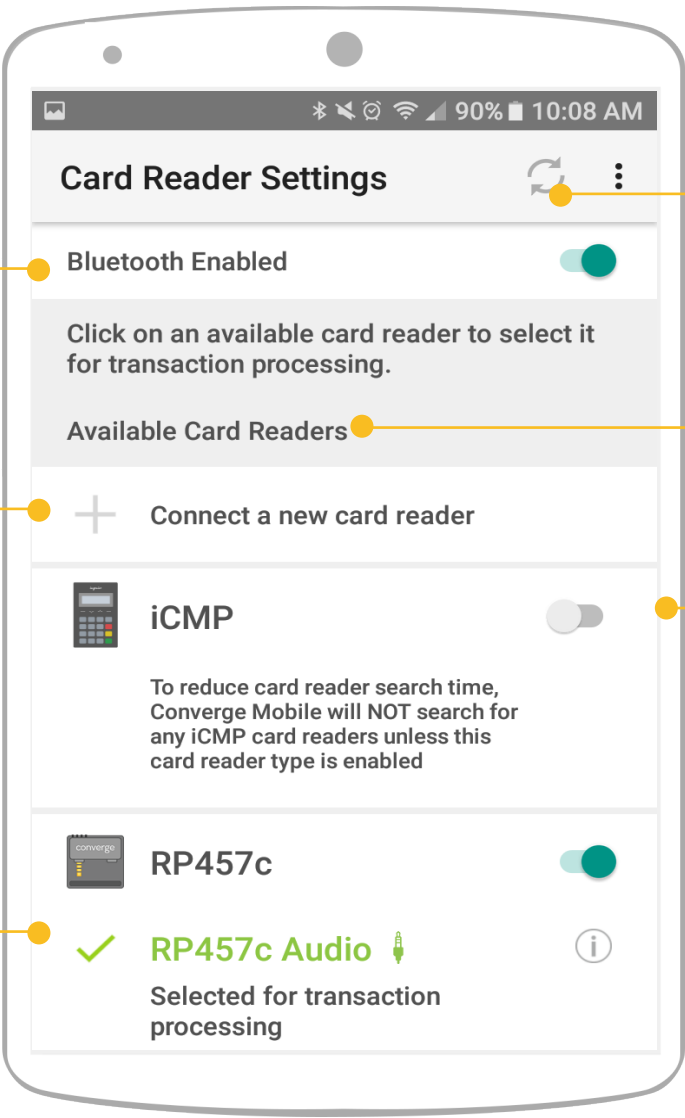
If you skipped card reader connection during first-time setup, or the attempt failed, you can always connect a card reader from settings.

1. Touch the **Menu**  icon on the top right corner of your Converge Mobile screen, then select **Settings**.
2. Select **Card Reader** from the menu options.
3. On the **Card Reader Settings** page, you will see connected card readers if you have any, with an icon ( / ) on the right indicating its connection type. Touch the **Connect a new card reader** option to add a new card reader.
4. Select your card reader type and follow the setup steps. Refer to [page 8](#) (iCMP), [page 10](#) (RP457c), and [page 12](#) (MagTek) for details.



Card Reader Settings Page

Card Reader Settings page is where you can view, edit and manage all your card reader related settings.



Bluetooth enable/disable toggle switch

Easily turn on/off Bluetooth without going to Android Settings.

Connect a new card reader

Follow the setup wizard to connect a new card reader via audio jack or Bluetooth, and it will be selected for transaction processing.

Selected card reader for transaction processing

Please note, only **one** connected card reader could be selected for transaction processing, which will be highlighted in green with a checkmark on the left.

Refresh

Redo a search and refresh the list of available card readers.

Available Card Reader list


Where you will find all connected card readers that are available for use.

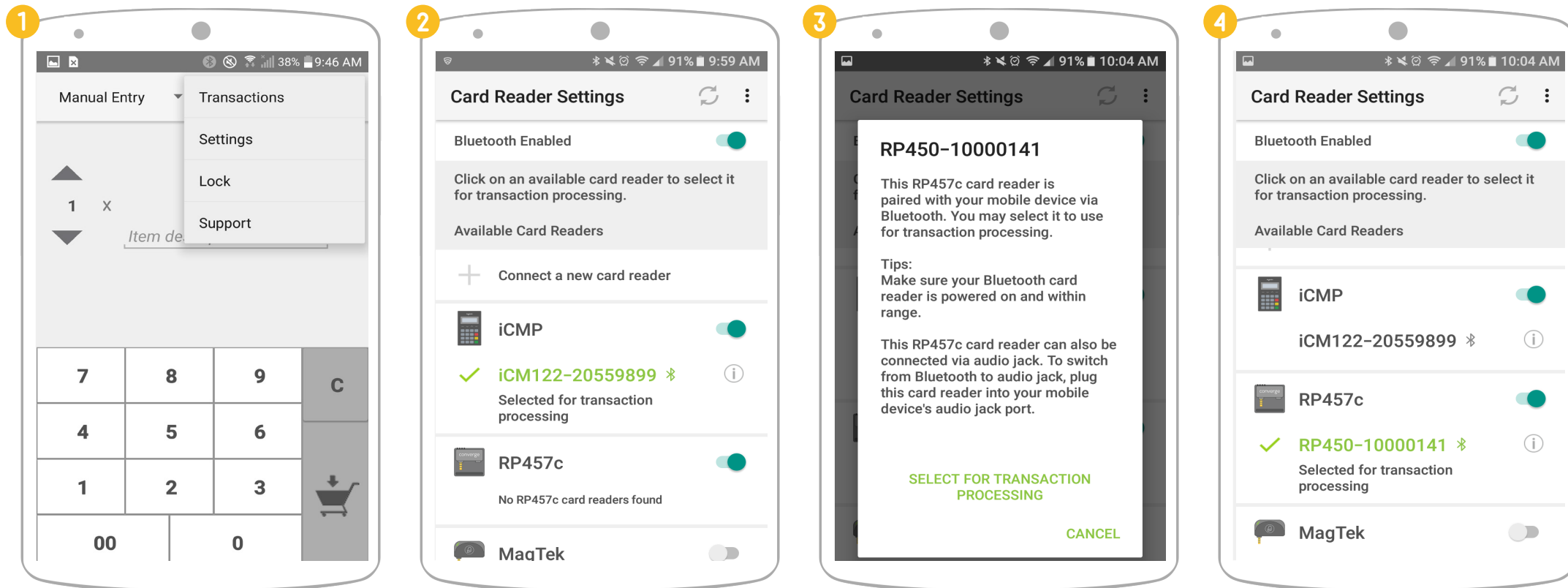
Card reader type enable/disable toggle switch

To reduce card reader search time, Converge Mobile will **NOT** search for card readers unless the card reader type is enabled.

How do I select a different card reader for transaction processing?

If you want to select a different card reader to process transactions, you can do it through **Card Reader** settings anytime. **Please note**, if the card reader you want to switch to has **NOT** been connected with Converge Mobile yet, refer to [page 14](#) to connect it, and it will be automatically selected for transaction processing. Otherwise, follow the steps below.

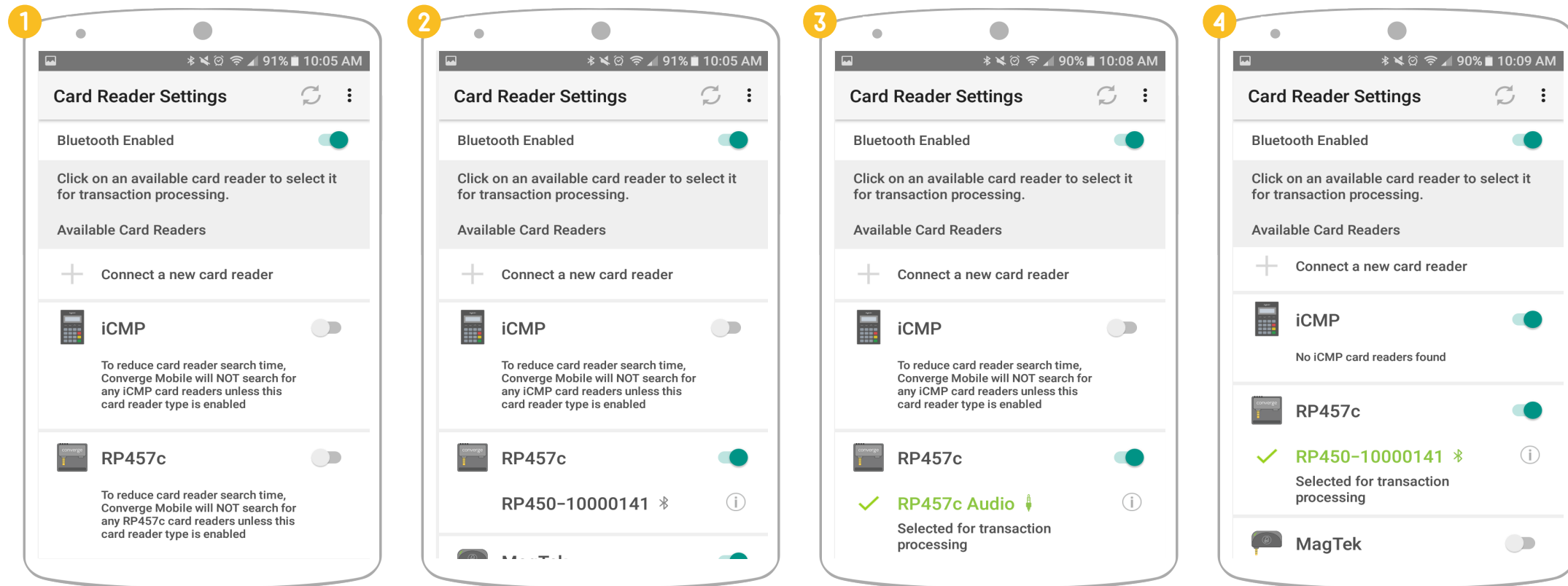
1. Touch **Menu** → **Settings** → **Card Reader**.
2. Touch any card reader from the **Available Card Readers** list to select it. The selected one will be highlighted in green with a checkmark on the left. A line of text "Selected for transaction processing" will also show up underneath the card reader name.
3. You may also touch the **information icon** () of the available card reader. A popup will show details of the card reader, at the bottom of which you will find the **Select for Transaction Processing** button.



How do I enable/disable a card reader type?

To reduce card reader search time, Converge Mobile will **NOT** search for card readers unless the card reader type is enabled. Touch the toggle switch to enable/disable the type. If you disable a card reader type, the connected card readers of the type will be disconnected and removed from the **Available Card Reader** list. If you enable a card reader type and no card reader of that type are found, you will see **"No card reader found"** text underneath the type.

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SECTION 2


PROCESSING TRANSACTIONS WITH CONVERGE MOBILE

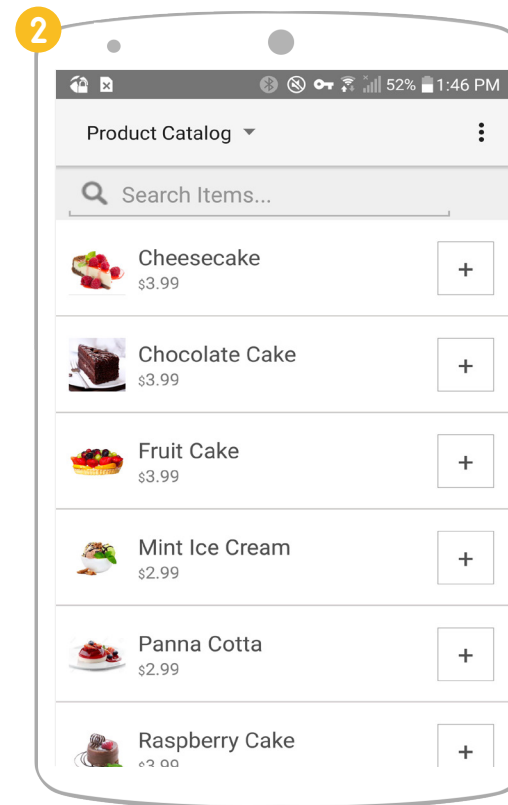
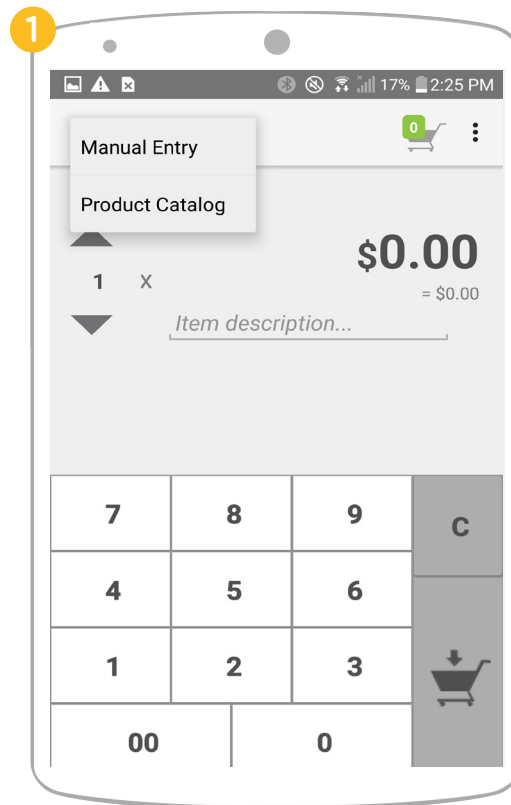
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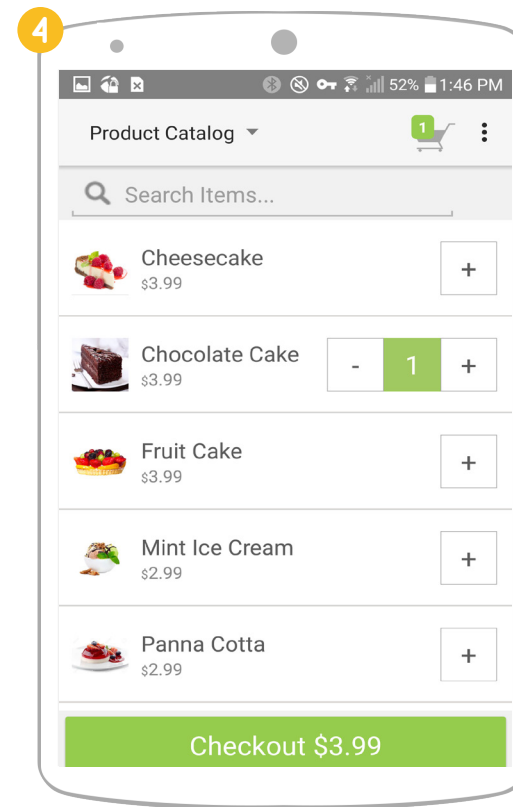
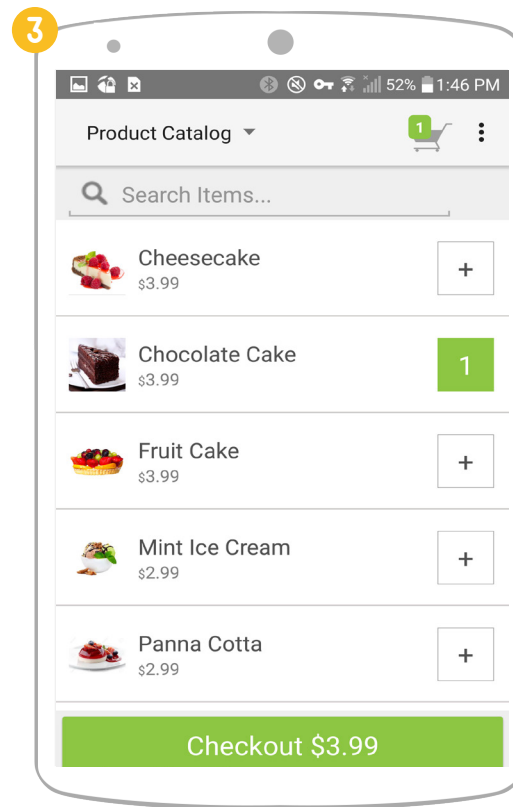
How do I add an item to checkout from the Product Catalog?

You can add multiple items from the Converge Product Catalog to checkout before processing a transaction. To add/remove items to/from checkout, follow the steps below.

1. Touch the **Dropdown Menu** at the top left corner of the screen. From the drop-down menu, select **Product Catalog**.
2. In the **Product Catalog**, touch the **plus** button  next to the item you wish to add to the **Shopping Cart**.

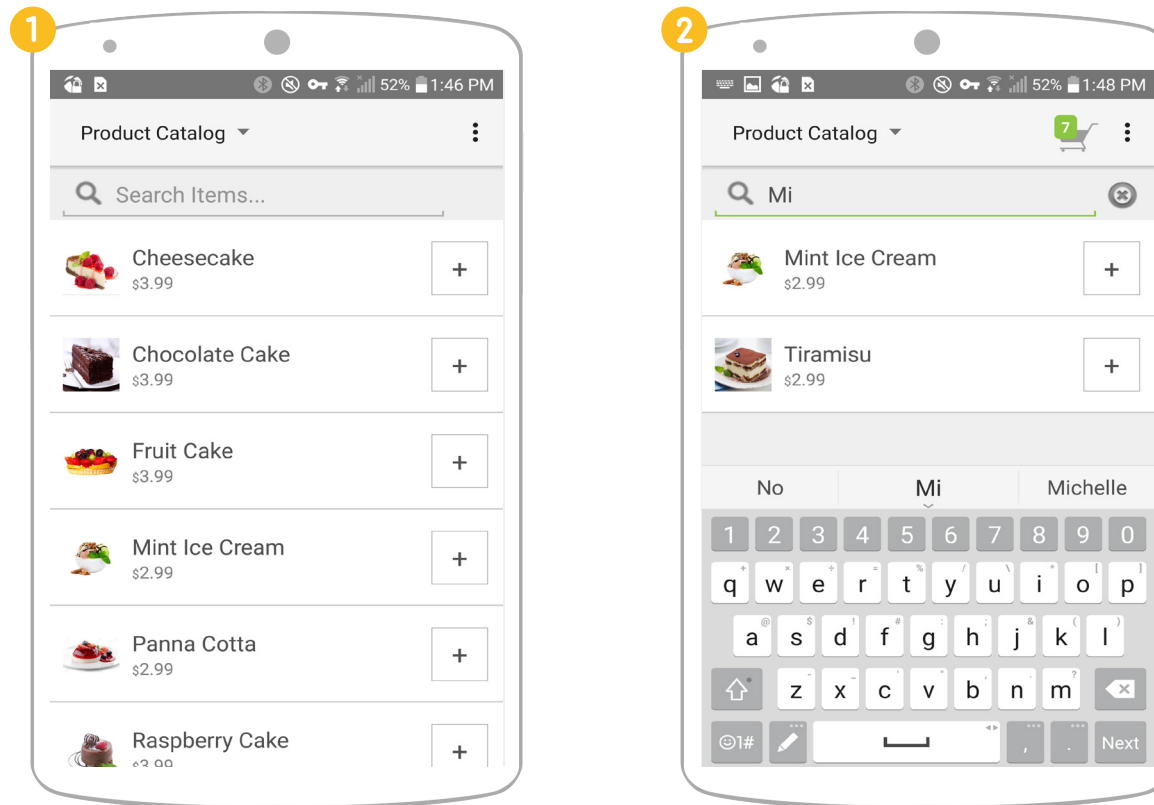


3. Touch the **Number Button** **1** next to the item to open up quantity edit options.
4. Add or remove additional copies of the selected item by touching the **plus** or **minus** buttons **- 2 +** next to the current item quantity.
5. Touch **Checkout** at the bottom of the page to complete the transaction.







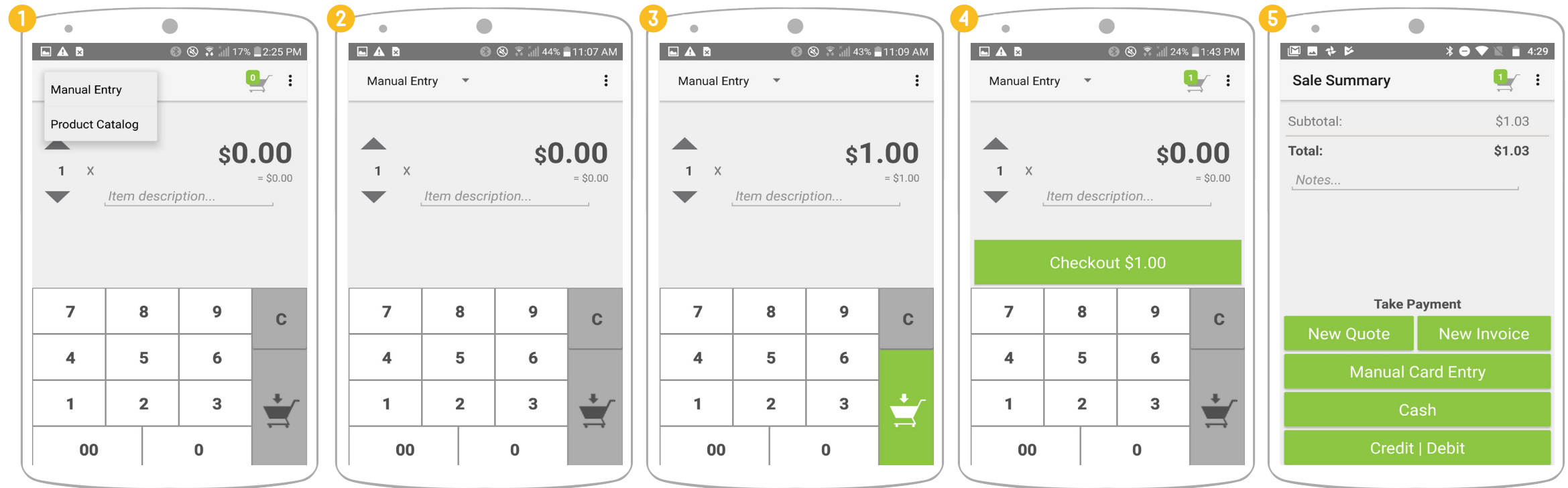
How do I search for items in the Product Catalog?

1. In Converge Mobile, touch the **Search Field** near the top of the screen.
2. Enter the name of the item you want to search for.
 - The Converge Mobile search bar can also search for partial terms.







How do I manually add an item to checkout?

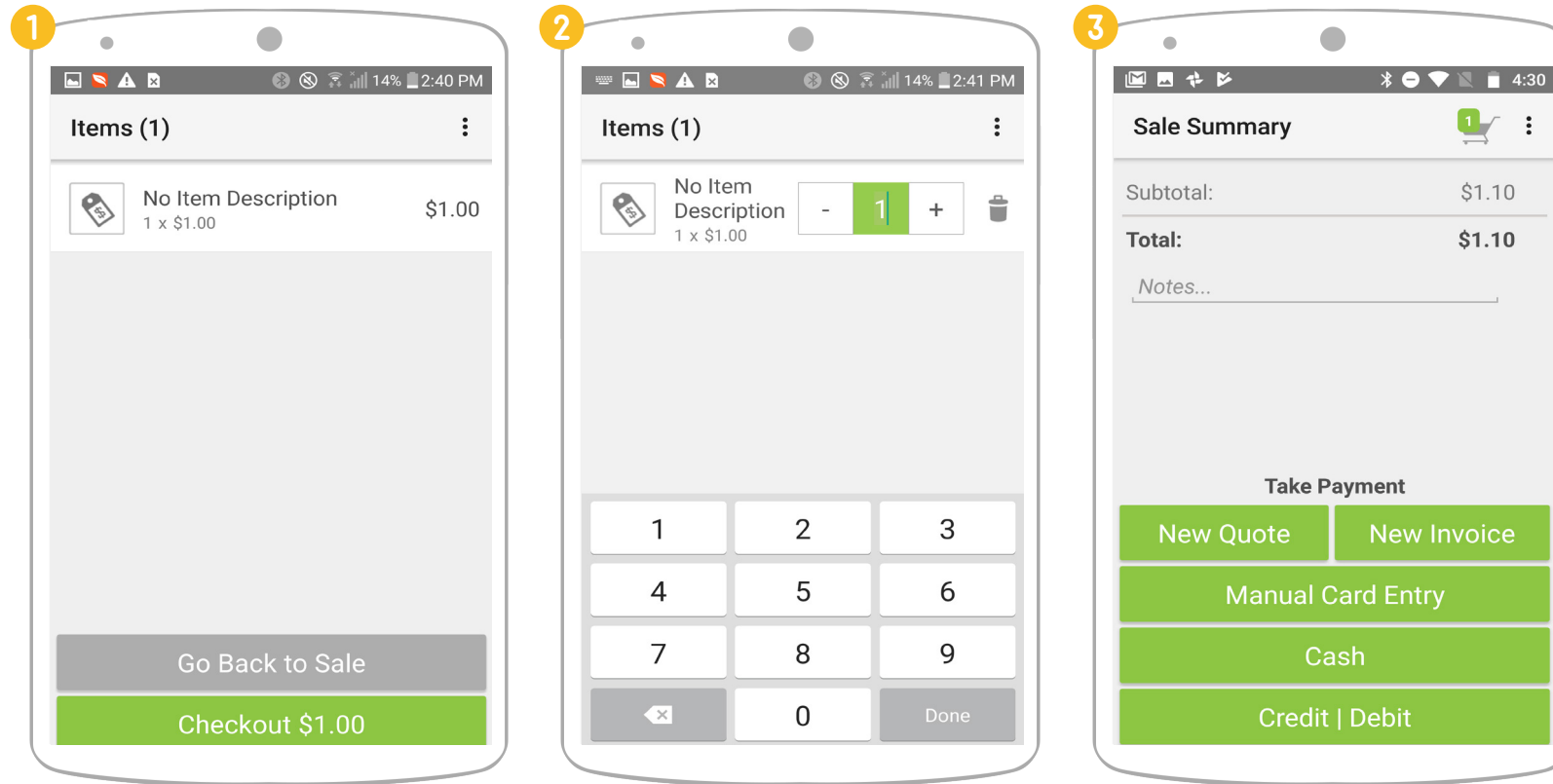
1. Touch the **Dropdown Menu** at the top left corner of the screen. From the drop-down menu, select **Manual Entry**.
2. To set a price for the item, Type in the item price. To enter a description for the item, touch the description field.
3. Touch the **Up**  or **Down**  arrows to increase or decrease the quantity. Touch the **Add to Cart**  button to add it to the current sale.
4. Touch the **Shopping Cart**  icon on the top right corner to review items.
5. Touch the **Checkout** button to initiate the payment process. You will see the **Sale Summary** screen with the sale details.



How do I finish a purchase with the Product Catalog?


When you are finished adding items from the catalog, you can review the checkout list before finalizing the transaction. To review your transaction and checkout, follow the steps below.

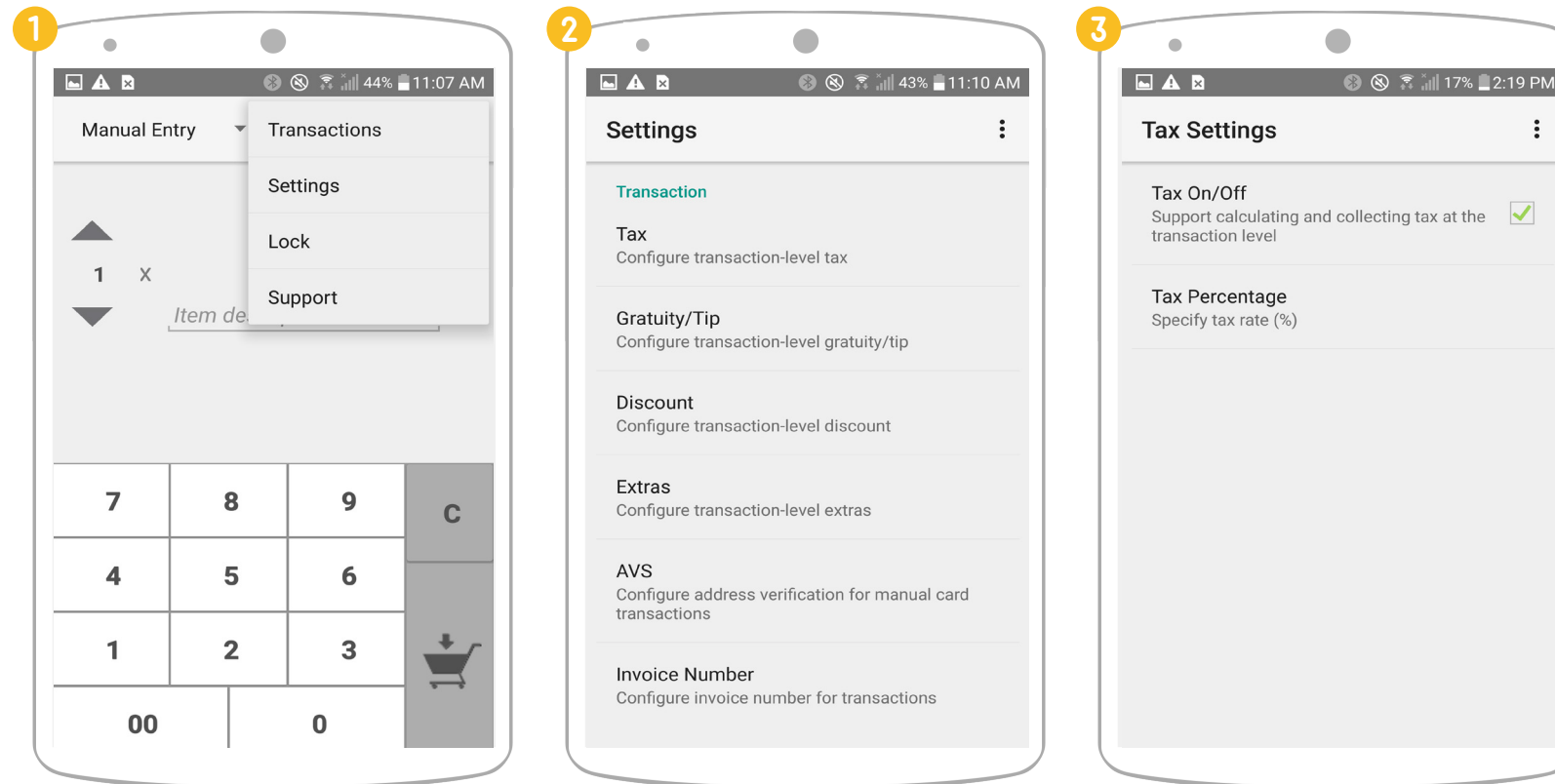
1. In Converge Mobile, touch the **Shopping Cart**  icon to view the **Checkout List**.
2. To edit the items in checkout, touch the item, then use the **plus** or **minus**    buttons to change the number of items.
3. When you are ready to pay, press the **Checkout Button**. Converge Mobile will display a review screen for the transaction and a list of options for payment.




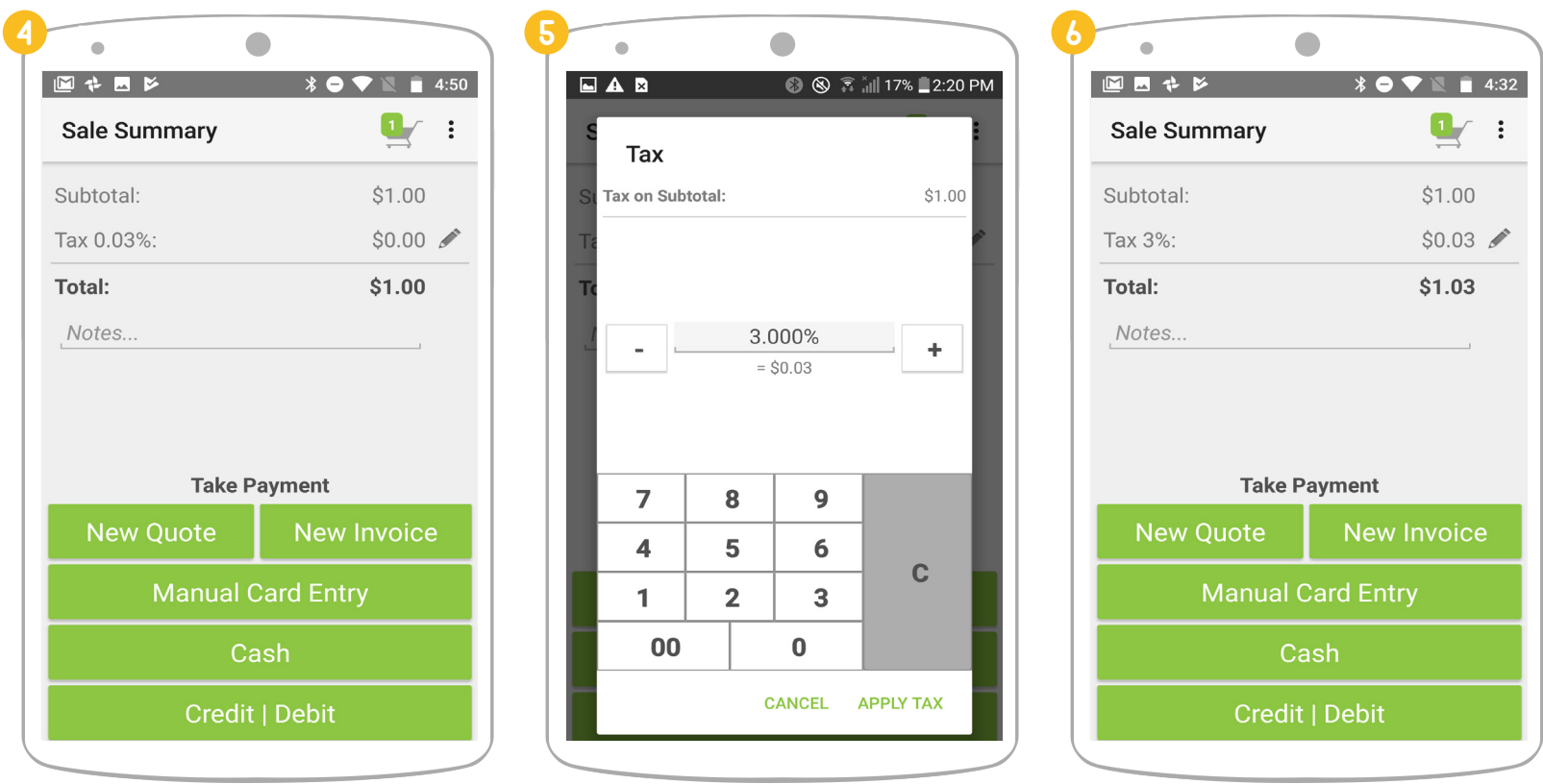
How do I modify tax settings and specify tax for a transaction?

Converge Mobile supports various business types by allowing users to add tax, discount and gratuity easily. These options are enabled and modified from the **Settings**.



1. Touch the **Menu**  icon and select **Settings**.
2. Select **Tax** from the menu options.
3. Toggle the **Tax On/Off** checkbox and specify a default tax percentage. Your options will be saved and automatically applied to each individual transaction.

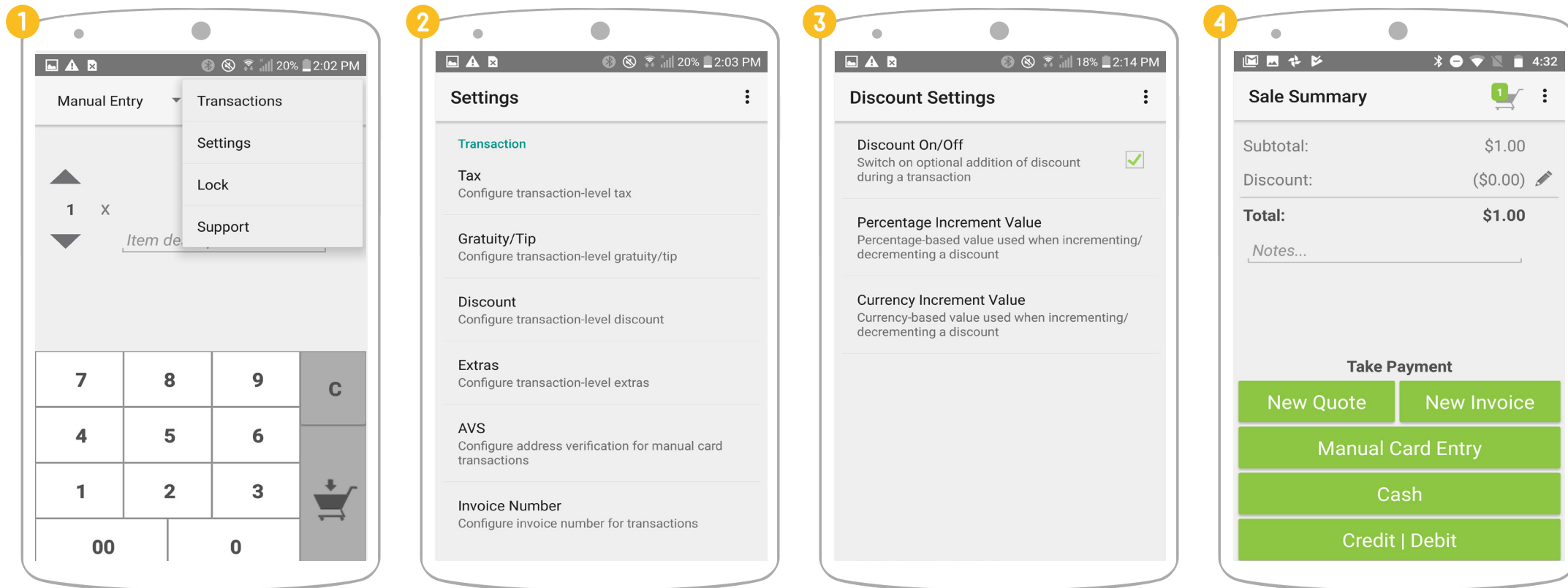


- 4. Once tax is enabled, you can edit sales tax for each individual transaction without changing the default tax percentage. Touch the **Edit** (Tax)  icon on the **Sale Summary** page.
- 5. Enter tax percentage as desired.
- 6. Touch the **Apply Tax to Current Sale** button and you will see the tax updated on the **Sale Summary** screen.




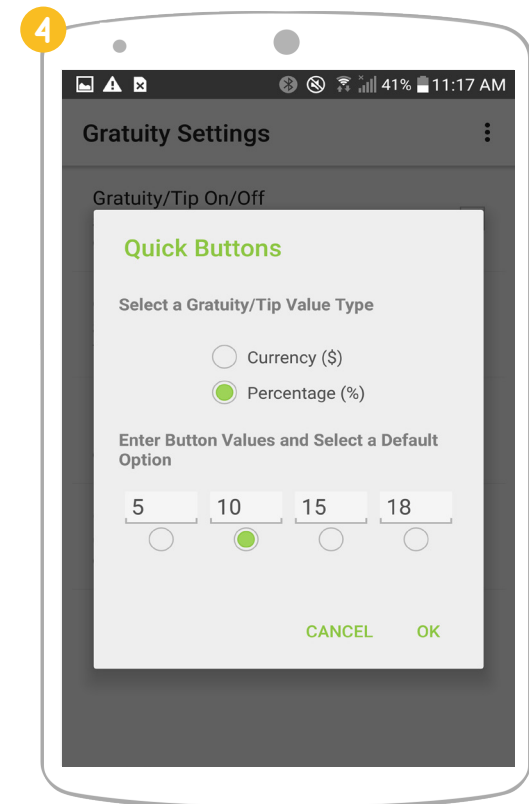
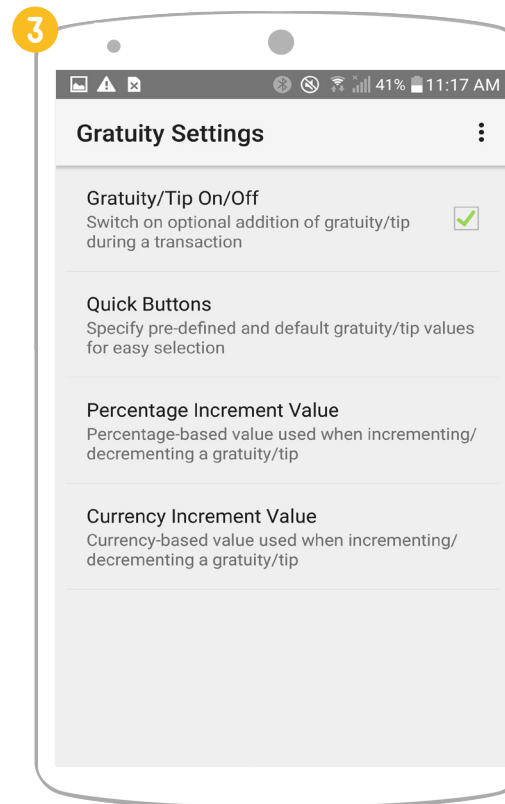
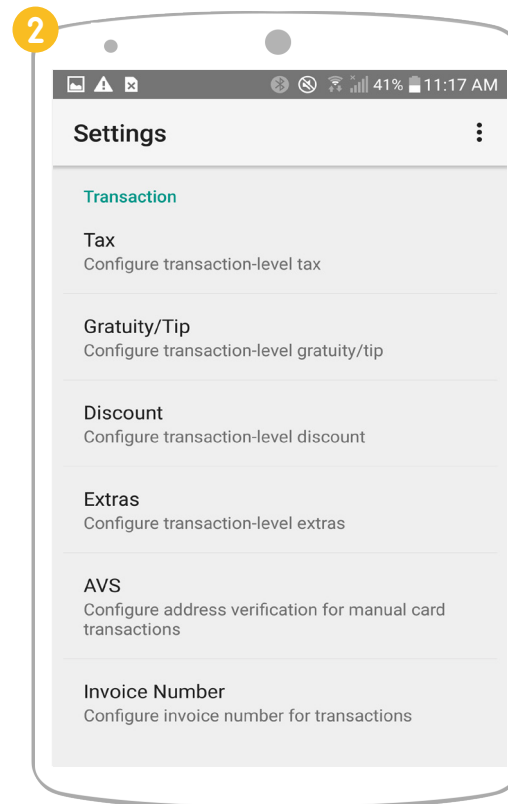
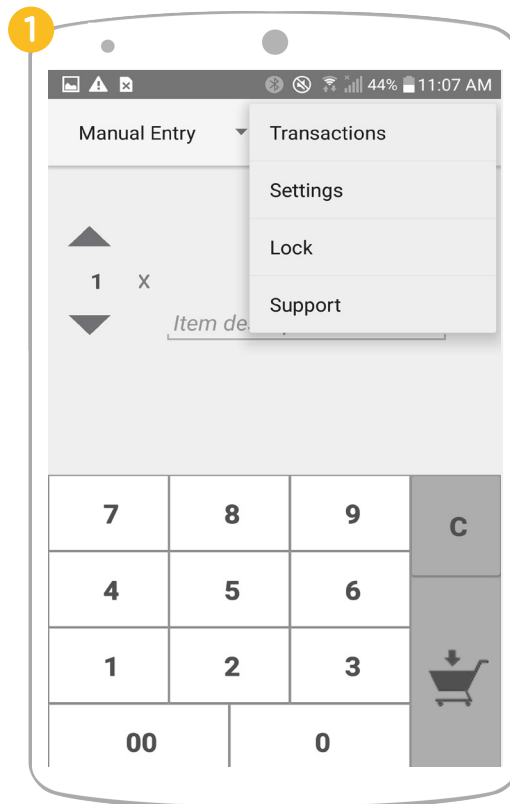
How do I modify discount settings and specify a discount for a transaction?

1. Touch the **Menu**  icon and select **Transactions**.
2. Select **Discount** from the menu options.
3. Toggle the **Discount On/Off** checkbox. Specify the percentage and currency increment value.
4. Once discount is enabled, add items to the sale and press the **Checkout** button, then touch the **Edit** (discount)  icon on the **Sale Summary** page to specify the desired discount percentage/amount for the current transaction.










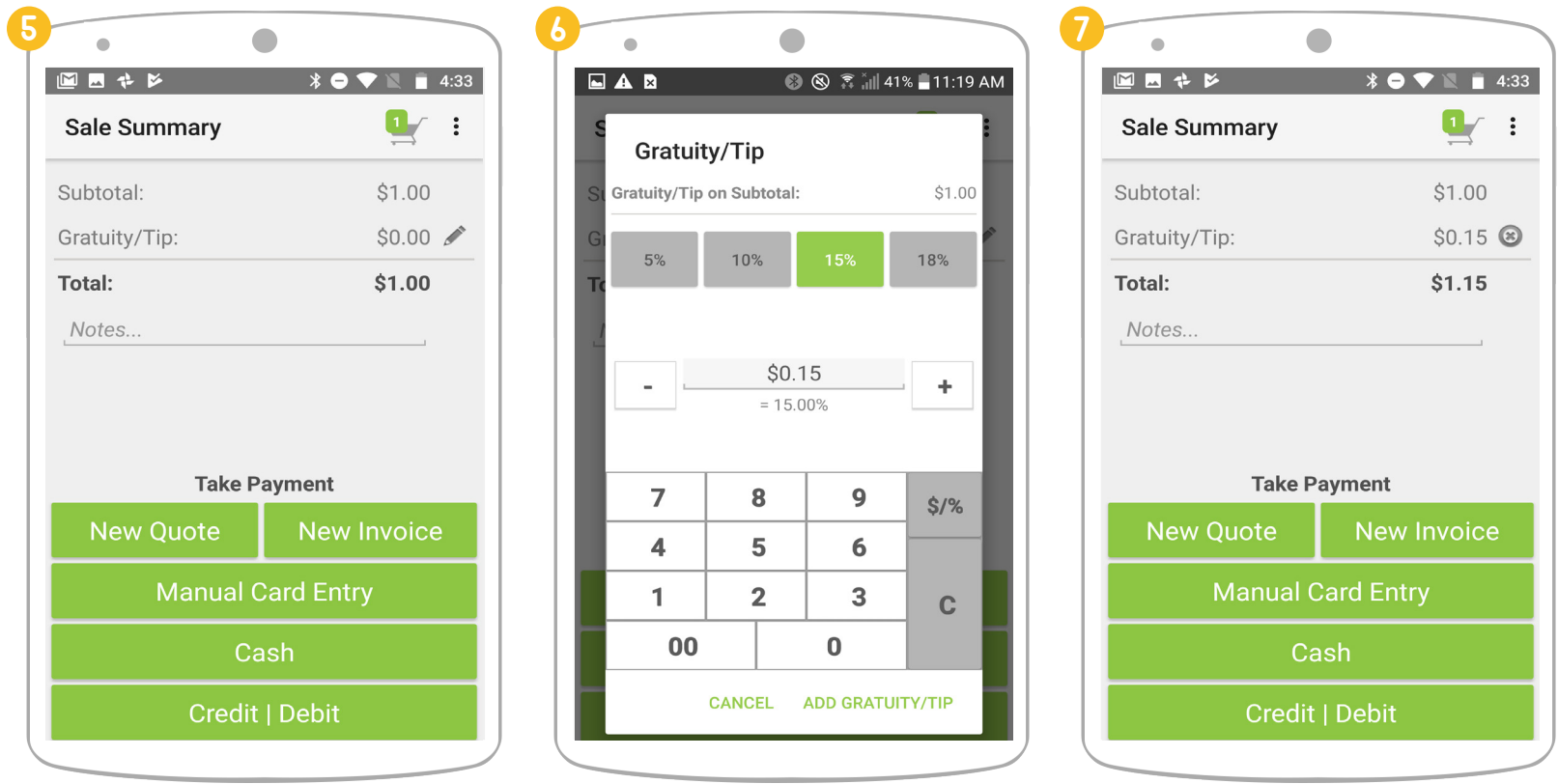
How do I modify gratuity settings and specify gratuity for a transaction?

1. Touch the **Menu**  icon and select **Settings**.
2. Select **Gratuity/Tip** from the menu options.
3. Toggle the **Gratuity/Tip On/Off** checkbox. Specify the percentage and currency increment value.
4. You can also define a set of **Quick Buttons** so cardholders can easily select a predefined gratuity percentage (e.g., 15%, 18%) or currency amount (e.g., \$1.00, \$5.00).



Handling gratuity in the app






- 5. Once gratuity/tip is enabled, after adding items and pressing the **Checkout** button, touch the **Edit** (gratuity/tip)  icon on the **Sale Summary** page to allow the cardholder to specify desired gratuity percentage/amount for the current transaction.
- 6. Use the **Quick Buttons**     at the top to easily add predefined gratuity value, or use the **Minus**  or **Plus**  buttons to make changes. The cardholders can also type in a custom value using the keyboard.
- 7. Touch the **Add Gratuity/Tip** button to apply it to the current sale.




Handling gratuity on the iCMP PIN pad

If you are using an iCMP PIN pad, you can handle gratuity on the iCMP instead of in the app, which is a more natural flow since you don't need to pass your mobile device back and forth to the cardholder.





Firstly, follow steps 1-4 on page 18 to enable gratuity from **Settings**. Afterwards, add items and press the **Checkout** button. On the **Sale Summary** page, leave the gratuity value as **\$0.00** and hit **Credit | Debit** button to initiate gratuity on the iCMP PIN pad.

- On the iCMP, use the **F1** , **F2**  and **F3**  buttons to easily select a pre-defined gratuity percentage or dollar amount. Then press the green **confirmation**  button to apply it to the current sale. If the cardholder wishes to enter a custom gratuity amount, they can do so by selecting **OTHER AMT** using the **F4**  button.




6. Enter custom gratuity amount and press the green **confirmation**  button to proceed.
7. Confirm the transaction amount on the iCMP when prompted.
8. Present card by inserting, swiping or tapping it. Converge Mobile will continue processing the transaction as usual.

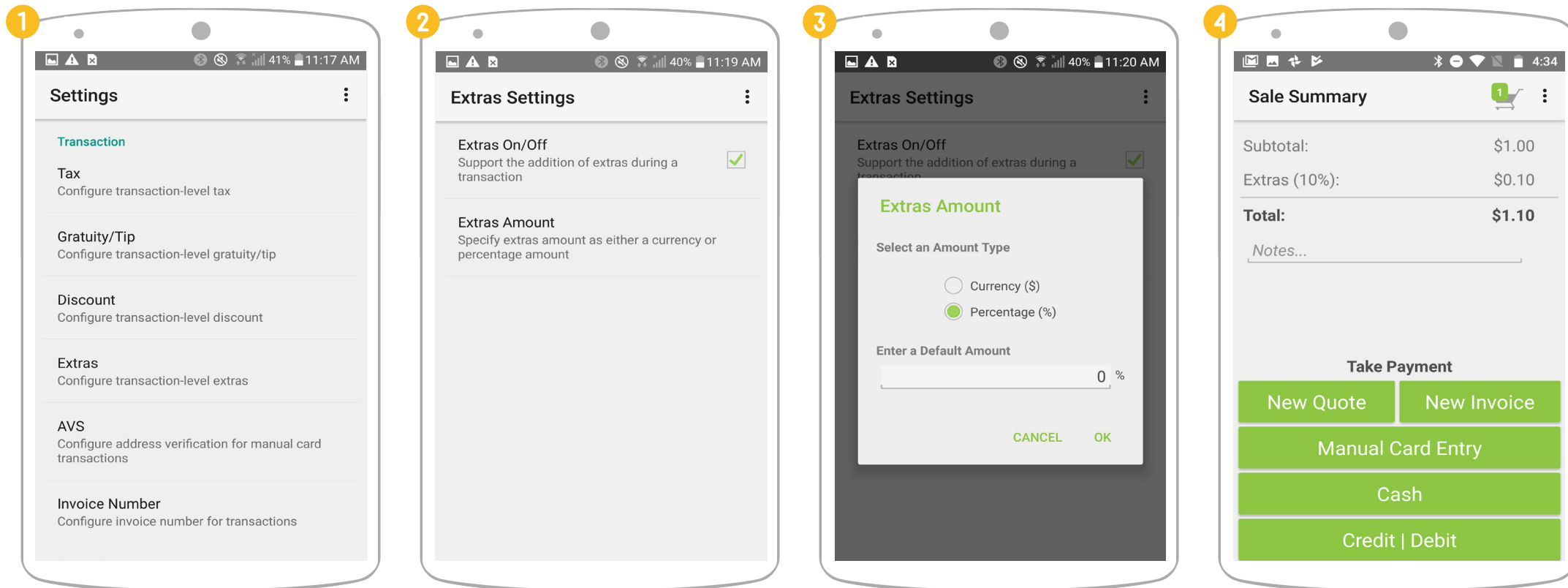
If the cardholder doesn't want to leave a tip, they can do it in the following ways.

1. On the **Add Gratuity** screen on the iCMP, touch the red **decline**  button.
2. Confirm to proceed with no gratuity by pressing **F4**  button when prompted.
3. Or on the **Add Gratuity** screen, select **OTHER AMT** by pressing **F4**  button.
4. On next page where to enter the new gratuity amount, leave it as \$0.00 and press the green **confirmation**  button to proceed.




How do I modify extras settings and specify an extra charge for a transaction?

1. Touch the **Menu**  icon and select **Settings**. Then Select **Extras** from the menu options.
2. Toggle the **Extras On/Off** checkbox.
3. Specify whether the extra charge should be a flat amount by selecting "Currency" or a percentage of the transaction by selecting "Percentage".
4. Specify the percentage or amount of the extra charge.

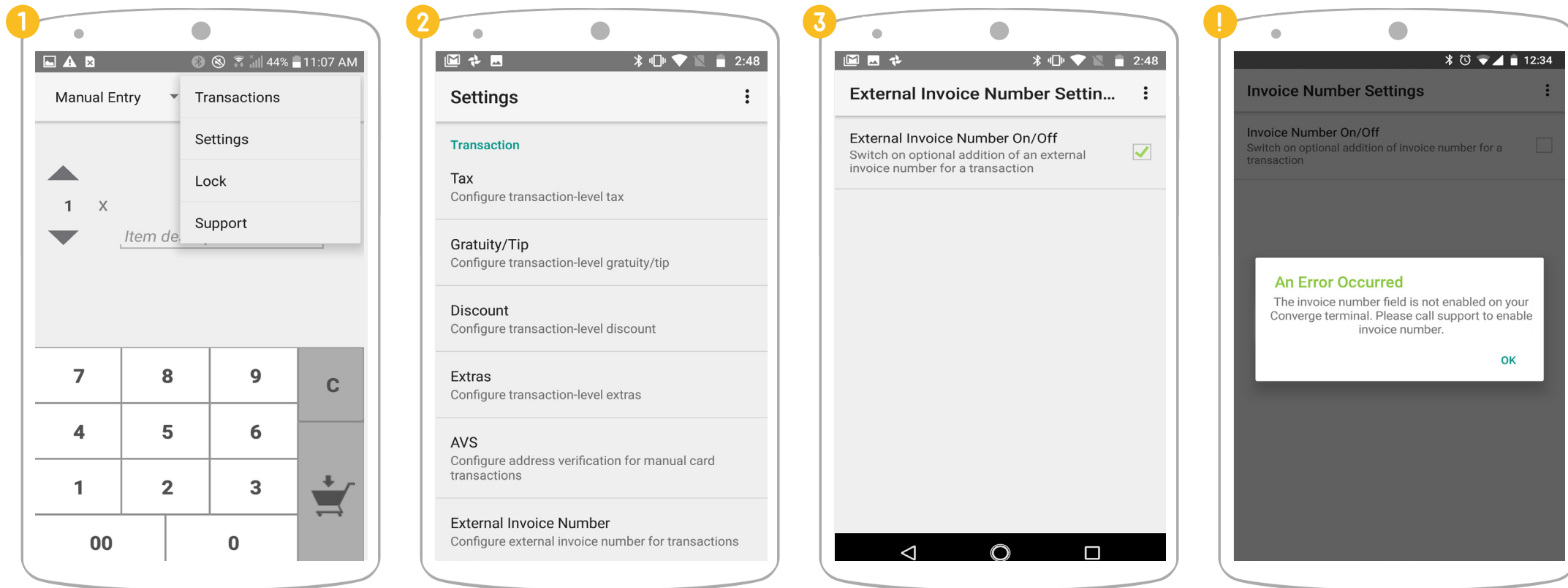


How do I add an external invoice number for a transaction?

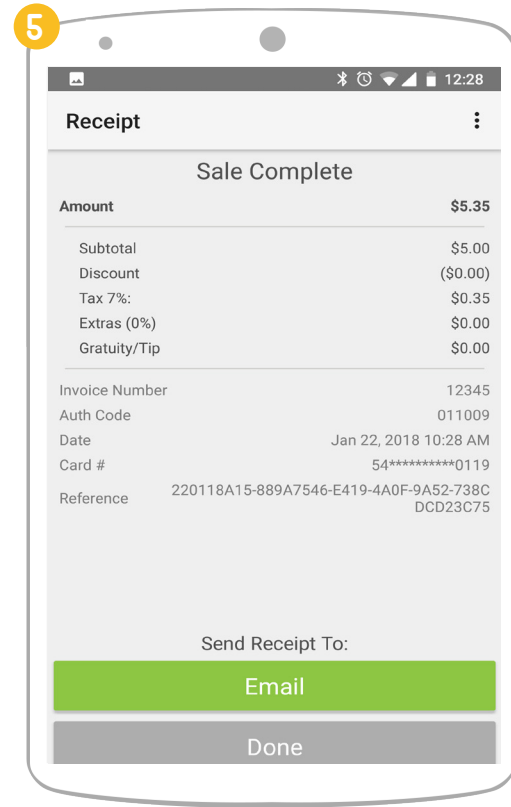
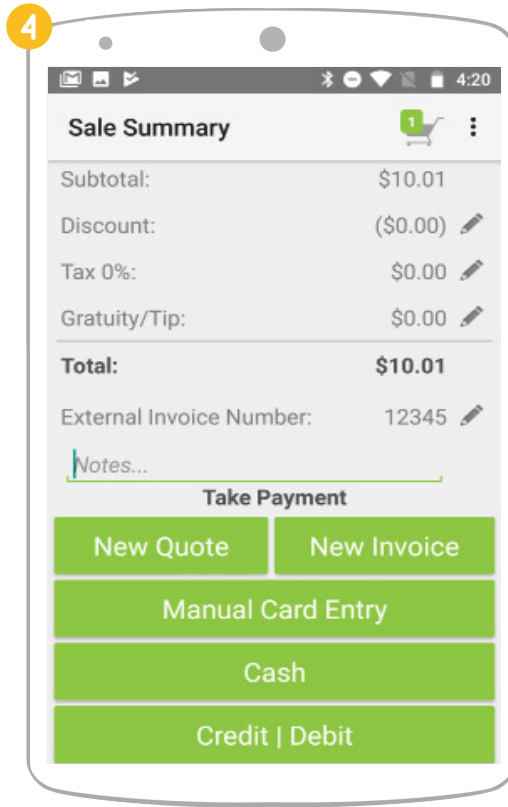
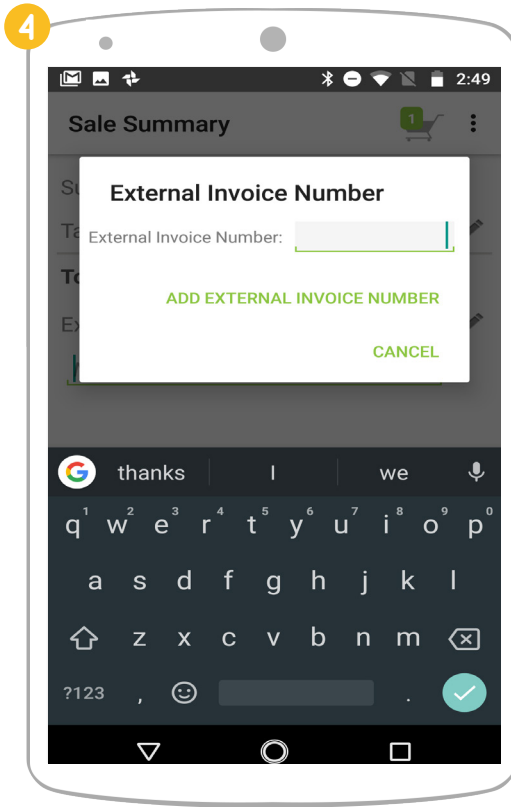
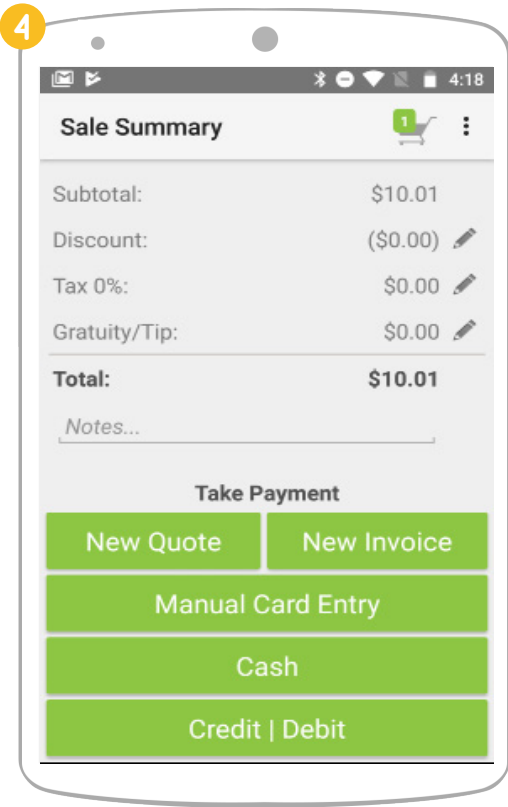
Starting with Converge Mobile 1.7, you can add an external invoice number to keep better track of your transactions.

1. Touch the **Menu**  icon and select **Settings**.
2. Select **External Invoice Number** from the setting options.
3. Toggle the **External Invoice Number On/Off** checkbox. Your options will be saved and automatically applied to each new transaction.

Please note, in order to enable the external invoice number feature for Converge Mobile, you **MUST** have it enabled on your Converge Terminal first. If you run into any problems, please call support (**1-800-377-3962**) for help.



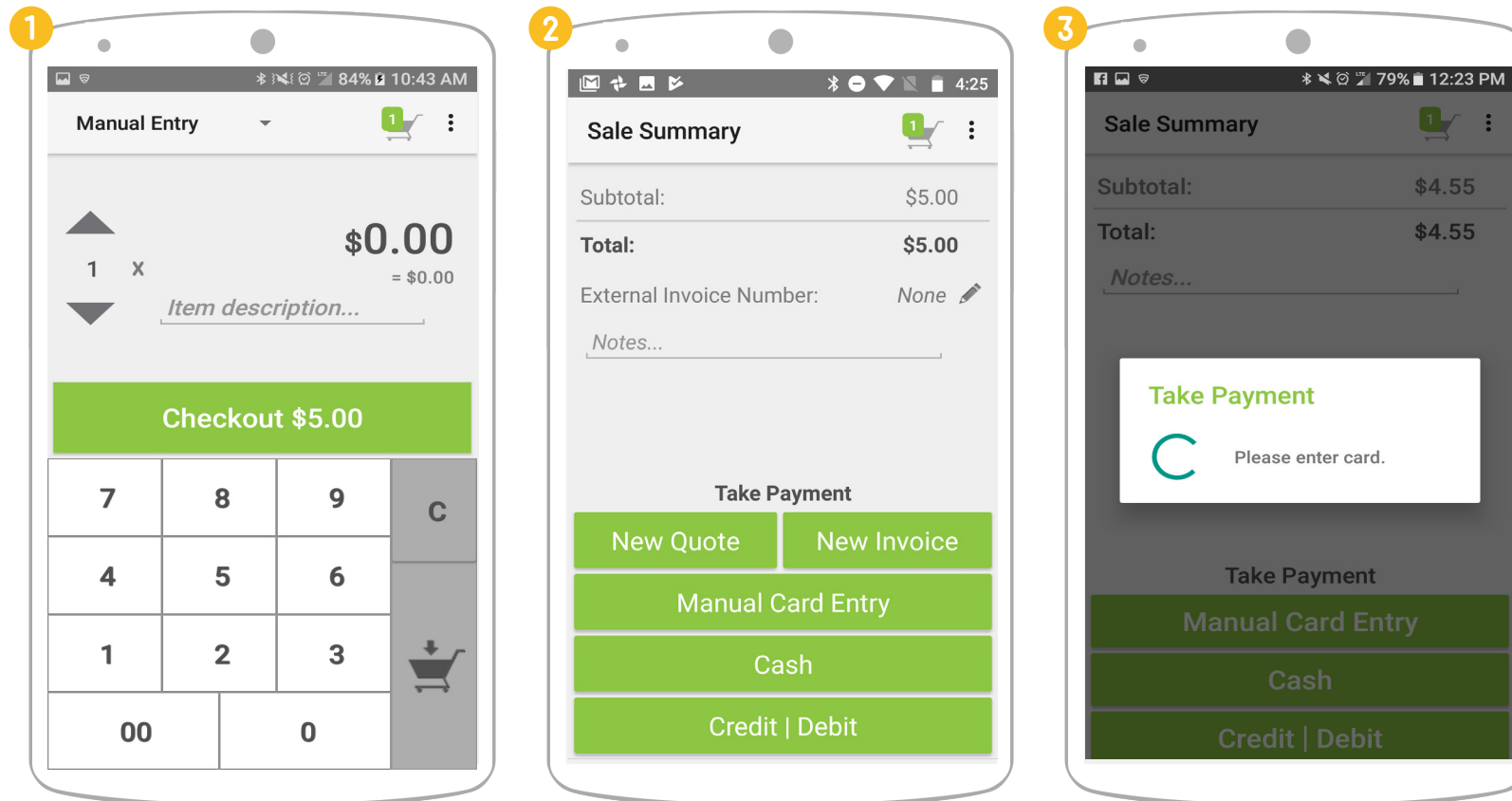
- 4. Once invoice capture feature is enabled, you will be able to add the **External Invoice Number** on the **Sale Summary** page for each new transaction.
- 5. Once the transaction is complete, you will see the external invoice number show up on the **Receipt**.



How do I process transactions with the iCMP PIN pad?

Credit card processing

1. Touch the **Checkout** button after adding items to the sale.
2. You are presented with four payment options: **New Quote** or **Invoice**, **Manual Card Entry**, **Cash**, and **Credit | Debit**. Select **Credit | Debit** if you are going to insert, swipe, or tap the card.
3. Converge Mobile will start the transaction and ask cardholder to insert, swipe, or tap their card on the iCMP PIN pad.






4. If the card has an embedded microchip, insert the chip end of the card into the bottom of the iCMP PIN pad with the chip facing up. **Please note**, the card must be inserted throughout the transaction.

If it is not a chip card, swipe the magstripe card at the top of the iCMP.

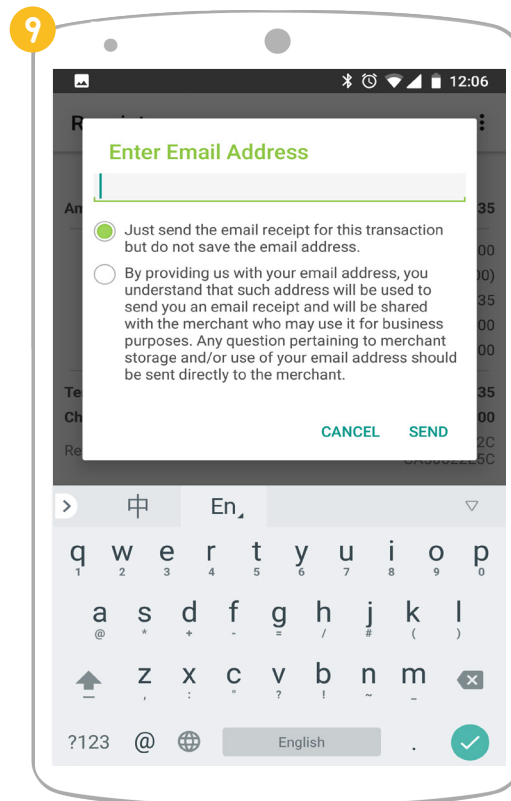
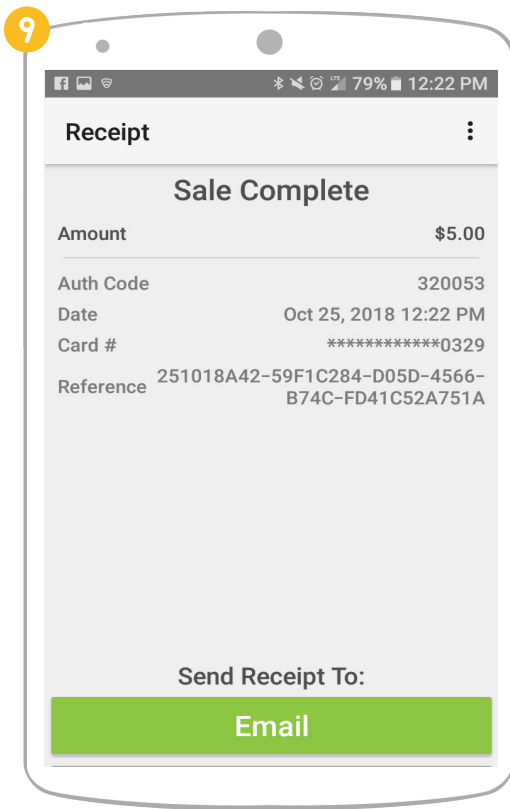
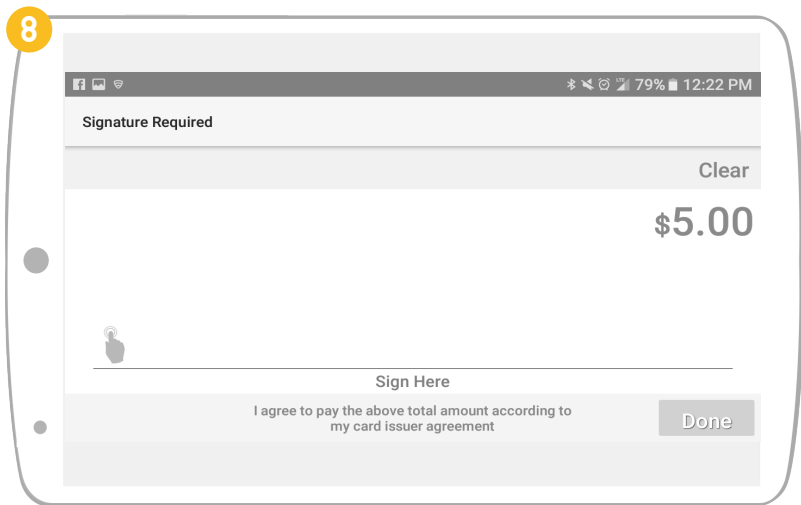
Converge Mobile also supports contactless transactions via card or mobile wallet with the iCMP, such as ApplePay or AndroidPay. In order to do so, tap the card or mobile phone on the PIN pad.







5. The iCMP will prompt the cardholder to confirm the transaction amount. Press  F1 button to confirm and  F3 to decline the amount, or  F4 to cancel the payment.
6. Once confirmed, Converge Mobile will send a request to authorize the card and process the transaction.
7. For chip card (EMV) transactions, once the authorization is approved, the iCMP will ask the cardholder to remove the card.



- 8. Converge Mobile may prompt for a signature, depending on the card used in the transaction.
- 9. Once the transaction is complete, the customer can choose to receive an email receipt by typing in his/her email address, or a paper receipt printed by a supported Bluetooth printer. If the customer choose not to get a receipt, simply touch **Done**.




Debit card processing

1. If the cardholder presents a debit card rather than a credit card, follow steps 1-4 on [page 28-29](#) to start transaction processing.
2. Select **Debit** using the **F3**  button when the iCMP PIN pad prompts you to select **Debit** or **Credit**.
3. Select **Checking** or **Savings** account type by pressing the **F2**  or **F4**  button on the iCMP.
4. The cardholder enters the debit PIN on the iCMP. Use the yellow **back**  button to delete any mistyped numbers.
5. Follow steps 5-9 on [page 39-40](#) to complete transaction processing.



Manually-entered card processing with the iCMP PIN pad

Converge Mobile allows you to manually key in the credit or debit card information **when using the iCMP PIN pad**. After adding items to the sale and selecting **Checkout**, select **Manual Card Entry** on the **Sale Summary** screen.

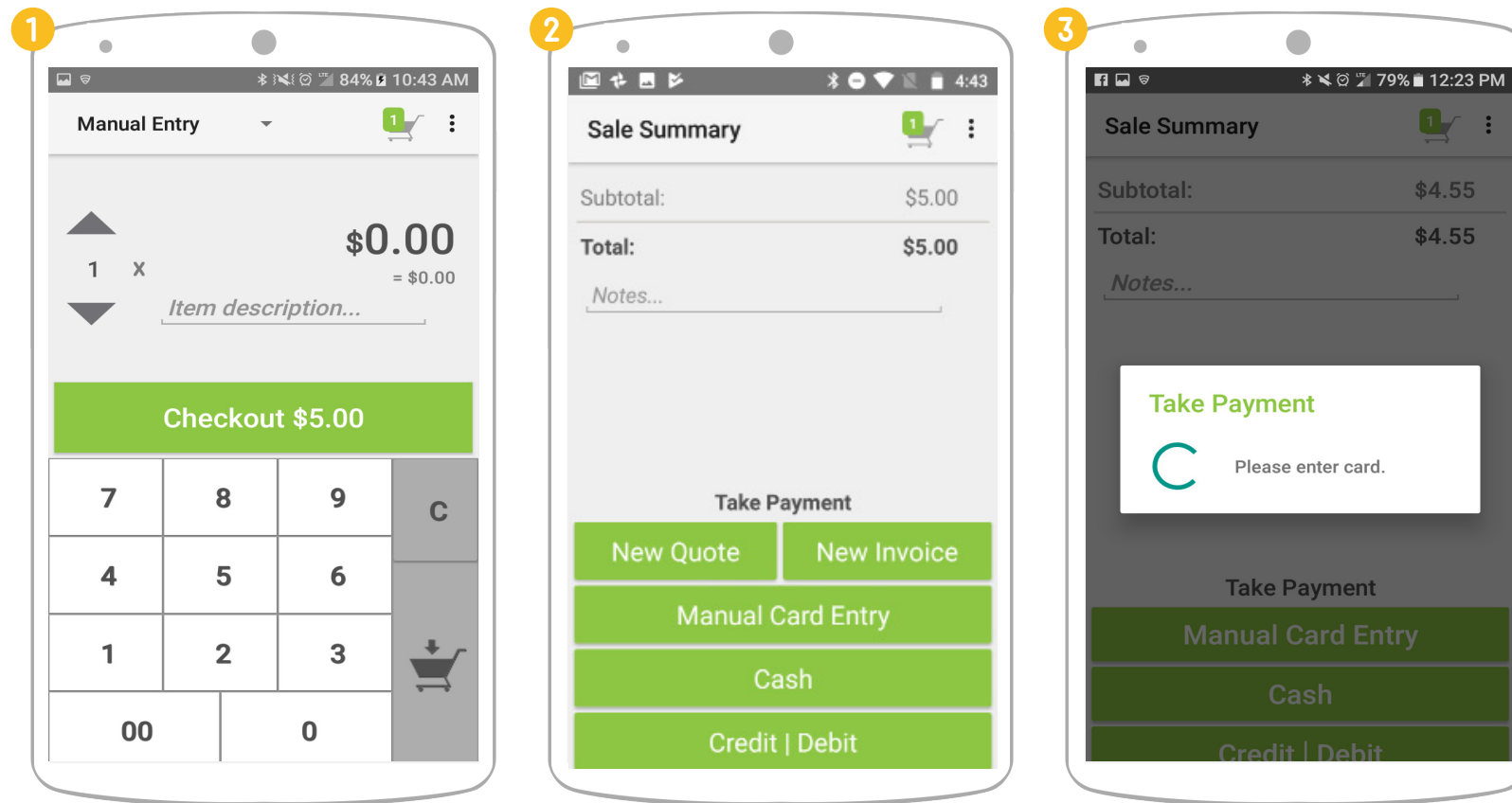
1. Select whether the card is **Present** or not when prompted. Enter the cardholder's **first and last name** as needed.
2. Type in the **card number** on the iCMP.
3. Enter the card **expiration date**.
4. Enter the **CVV** or **CID** (security) code. Then touch the green **confirmation**  button to continue transaction processing as usual.

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How do I process transactions with the RP457c and MagTek card reader?

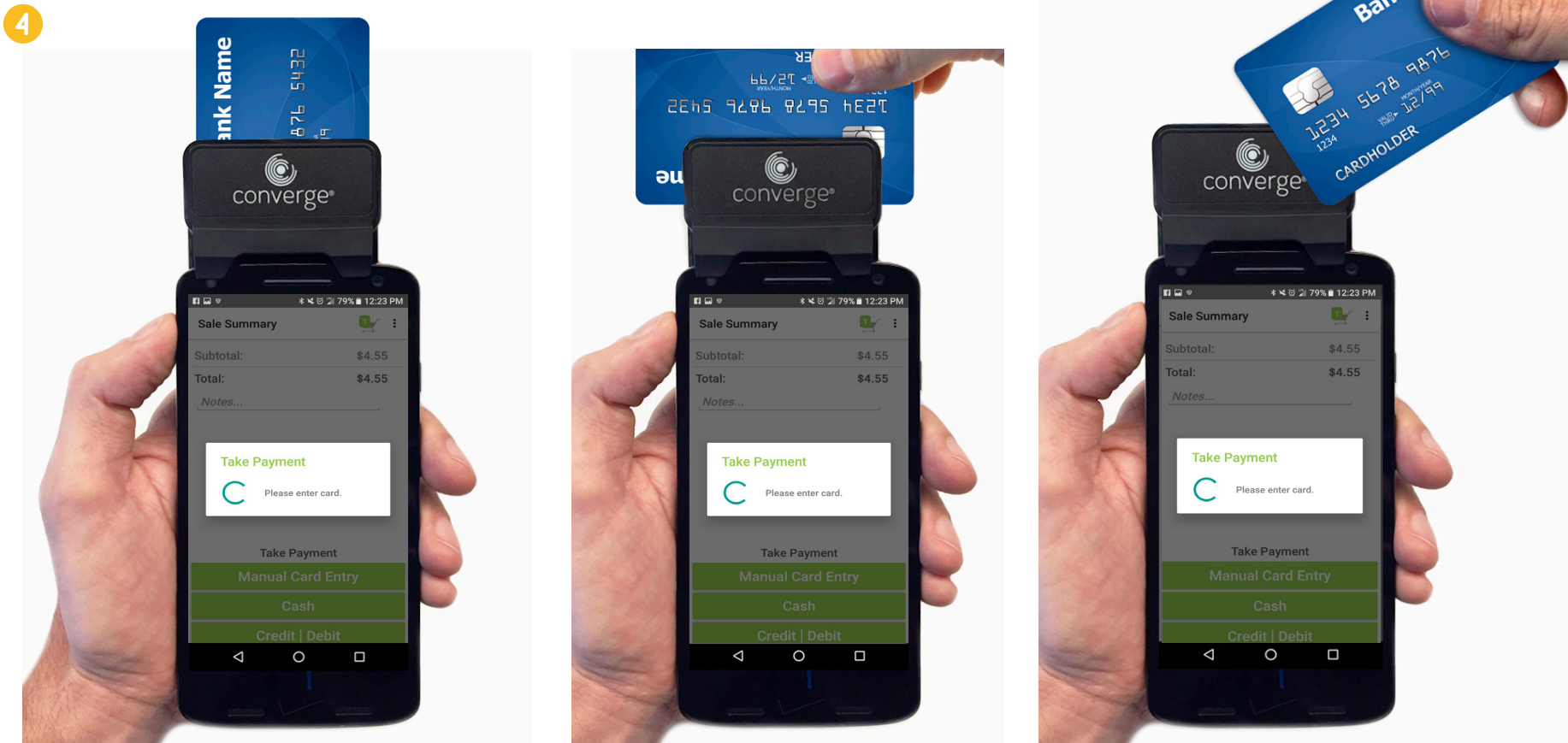
1. Touch the **Checkout** button after adding items to the sale.
2. Select **Credit | Debit** from the **Sale Summary** page.
3. Converge Mobile will start the transaction and ask the cardholder to enter card on your card reader.



4. If you are using the **Ingenico RP457c card reader**, if the card has an embedded microchip, insert the chip end of the card into the RP457c card reader with the chip facing up. **Please note**, the card must be inserted throughout the transaction.

If it is not a chip card, swipe the card at the top of the RP457c with the magnetic stripe facing down.

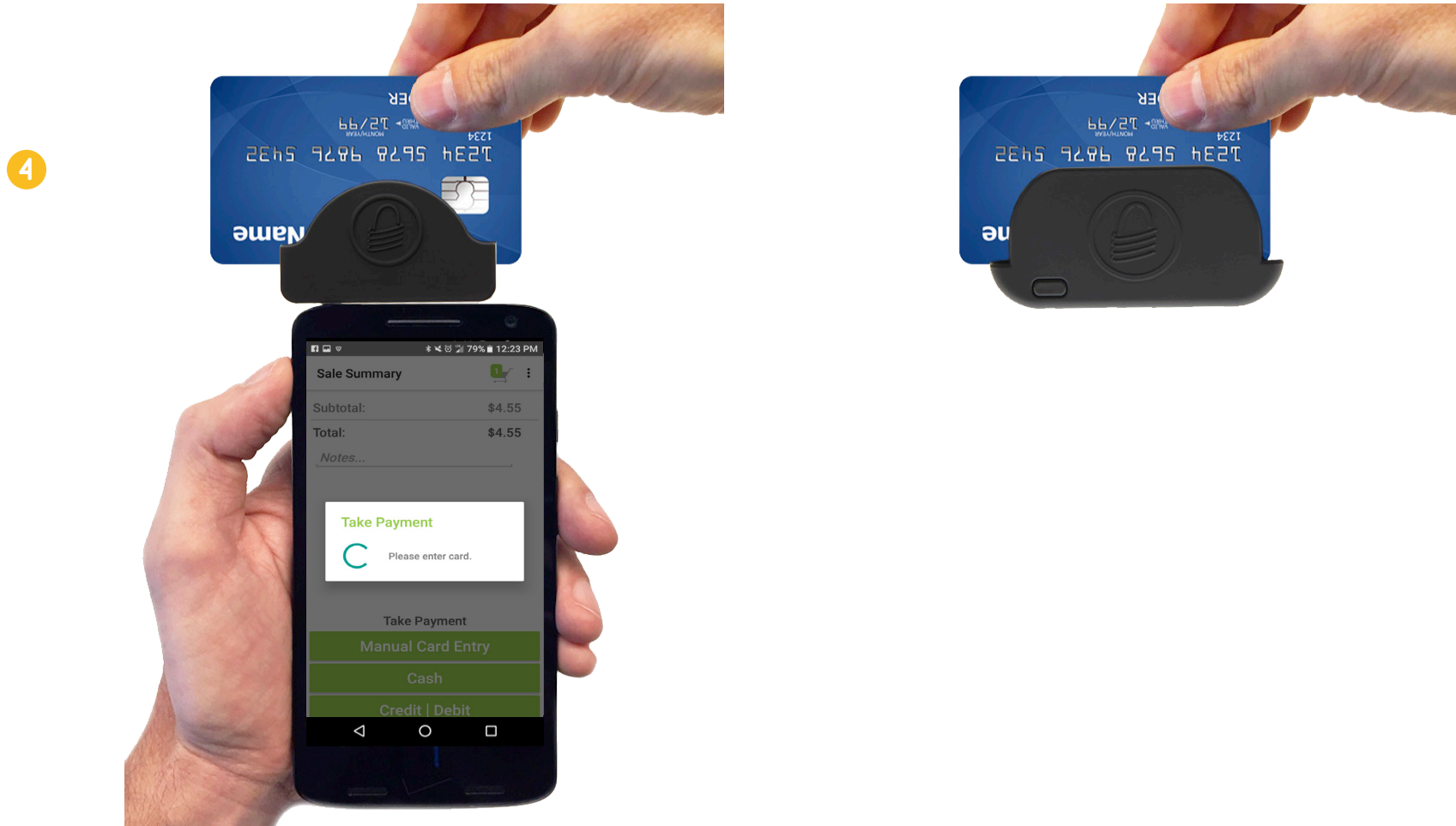
Converge Mobile also supports contactless transactions via card or mobile wallet with the RP457c, such as ApplePay or AndroidPay. To use this feature, tap the card or mobile phone against the card reader.



Insert, swipe and tap card with the Ingenico RP457c card reader

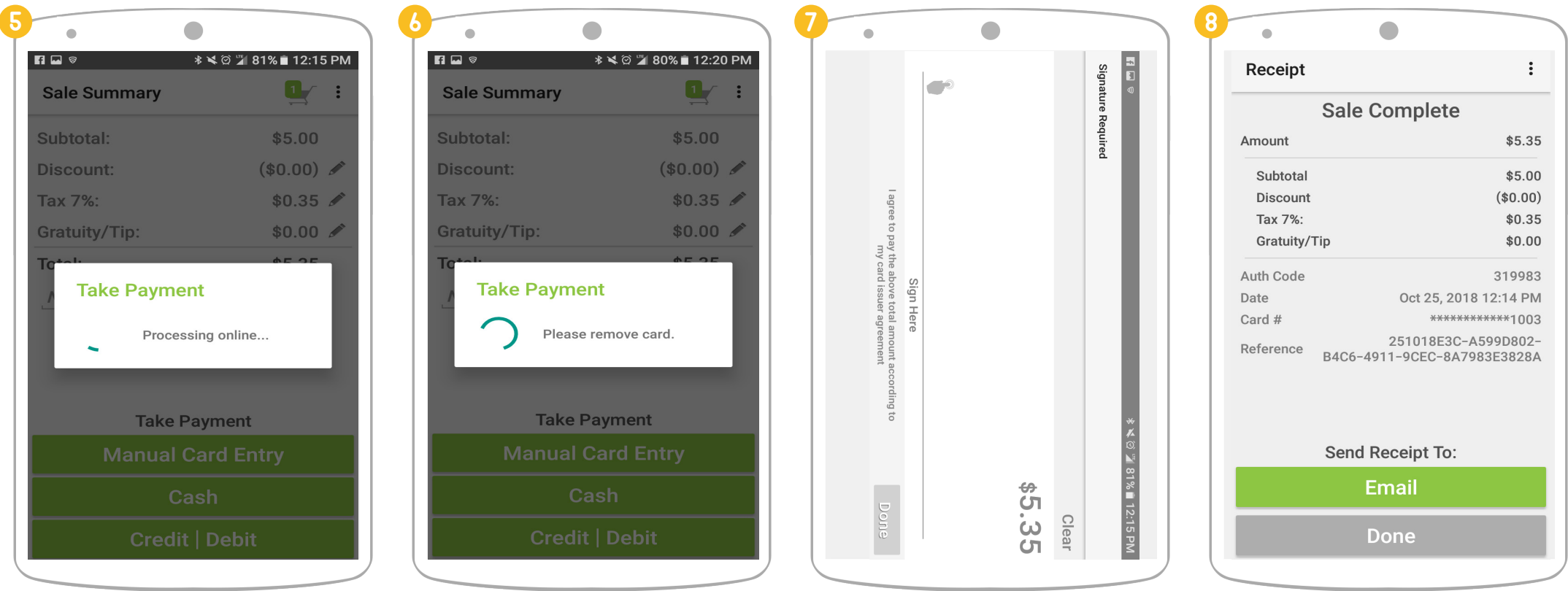
If you are using any **MagTek card reader**, swipe a magstripe card for card entry. The image below on the left shows how uDynamo, and aDynamo works and the one on the right shows how BulleT works.

Please note, if your MagTek BulleT card reader is powered off, press the power button to turn it on. When it's ready to transact, you will see a solid green light.



Swipe card with the MagTek uDynamo and BulleT card reader

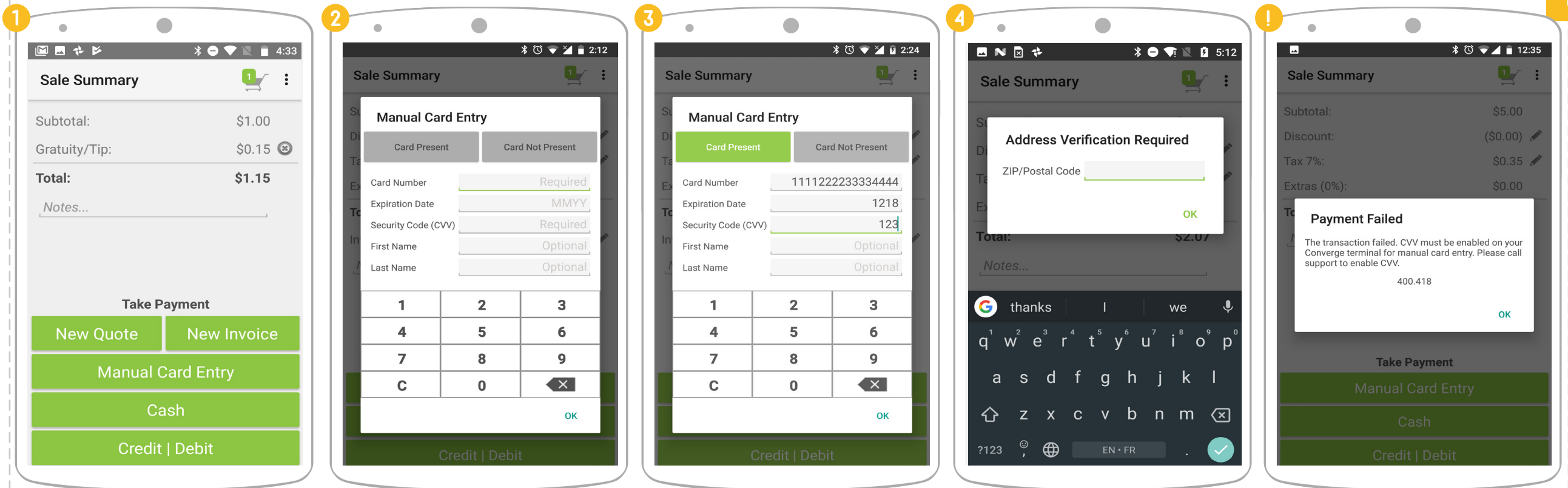
- 5. Converge Mobile will start to process the transaction.
- 6. For chip card (EMV) transactions, remove the card from the RP457c card reader when Converge Mobile tells you to do so.
- 7. Converge Mobile may prompt for a signature, depending on the card used in the transaction.
- 8. Once the transaction is complete, the customer can choose to receive an email receipt by typing in his/her email address, or a paper receipt printed by a supported Bluetooth printer.




How do I key in card information manually (Manual Card Entry)?

Converge Mobile allows you to manually key in the credit or debit card information both **inside the app**, as well as on **the iCMP PIN pad** (refer to [page 35](#)). **Please note**, in order to enable manual card entry feature for Converge Mobile, you **MUST** have **CVV** enabled on your Converge Terminal first. If you run into any problem, please call support (**1-800-377-3962**) for help.

1. Add items to the sale and press **Checkout**, select **Manual Card Entry** on the **Sale Summary** screen.
2. Select whether the card is **Present or not** at the top of the **Manual Card Entry** popup.
3. Enter the **card number**, card **expiration date** and **security code (CVV)** in the app.
4. Enter **Zip / postal code** if **Address Verification Service** is required. Once complete, touch the **OK** button to process the transaction.

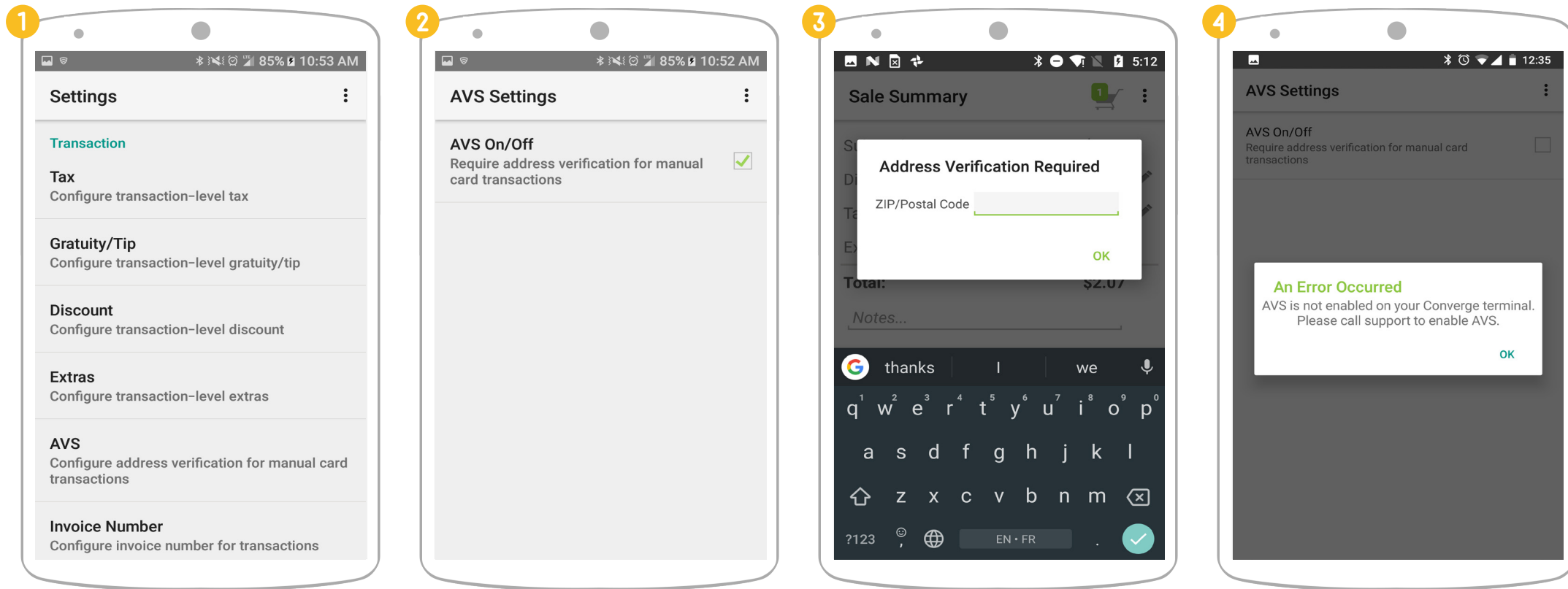


How do I enable Address Verification Service (AVS)?

1. Touch the **Menu**  icon and select **Settings**. Then Select **Address Verification (AVS)** from the setting options.
2. Toggle the **AVS On/Off** checkbox.
3. 3. Once Address Verification Service is enabled, Manual Card Entry will require you to input the cardholder's ZIP code to complete the transaction.

Please note, in order to enable AVS feature for Converge Mobile, you **MUST** have **AVS** enabled on your Converge Terminal first. If you run into any problem, please call support (1-800-377-3962) for help.

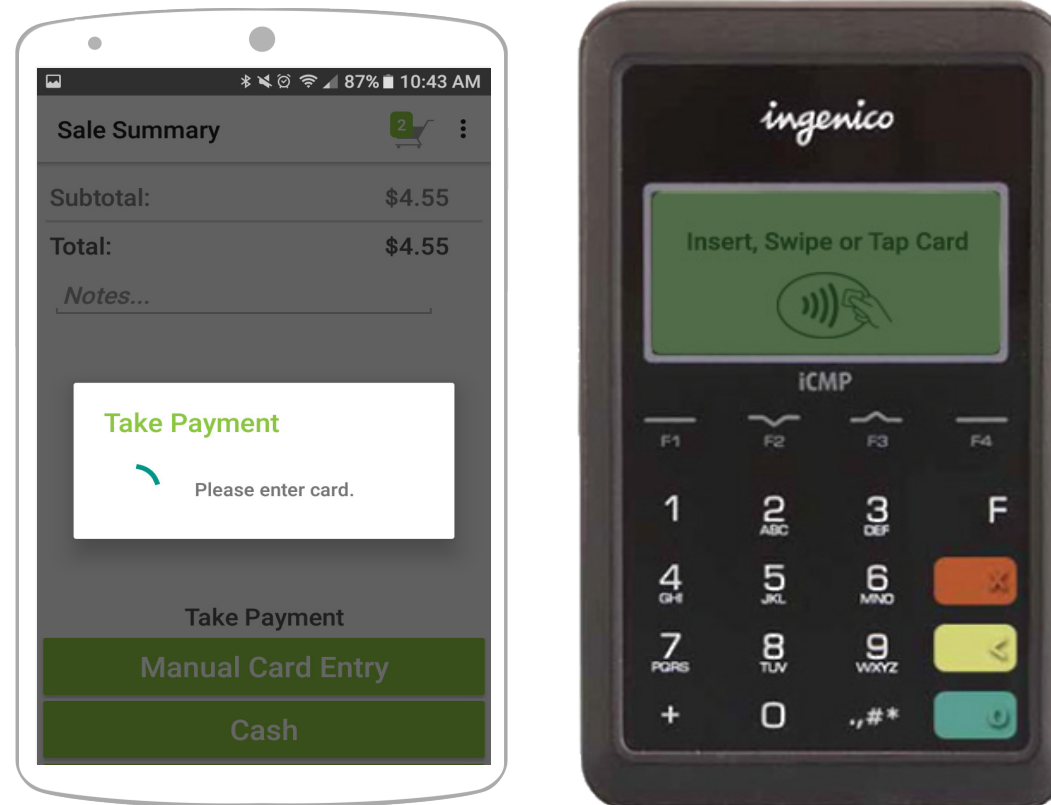
48



How do I cancel a transaction?

While processing a transaction with the iCMP, you can cancel the sale by pressing the red **decline**  button on the PIN pad.

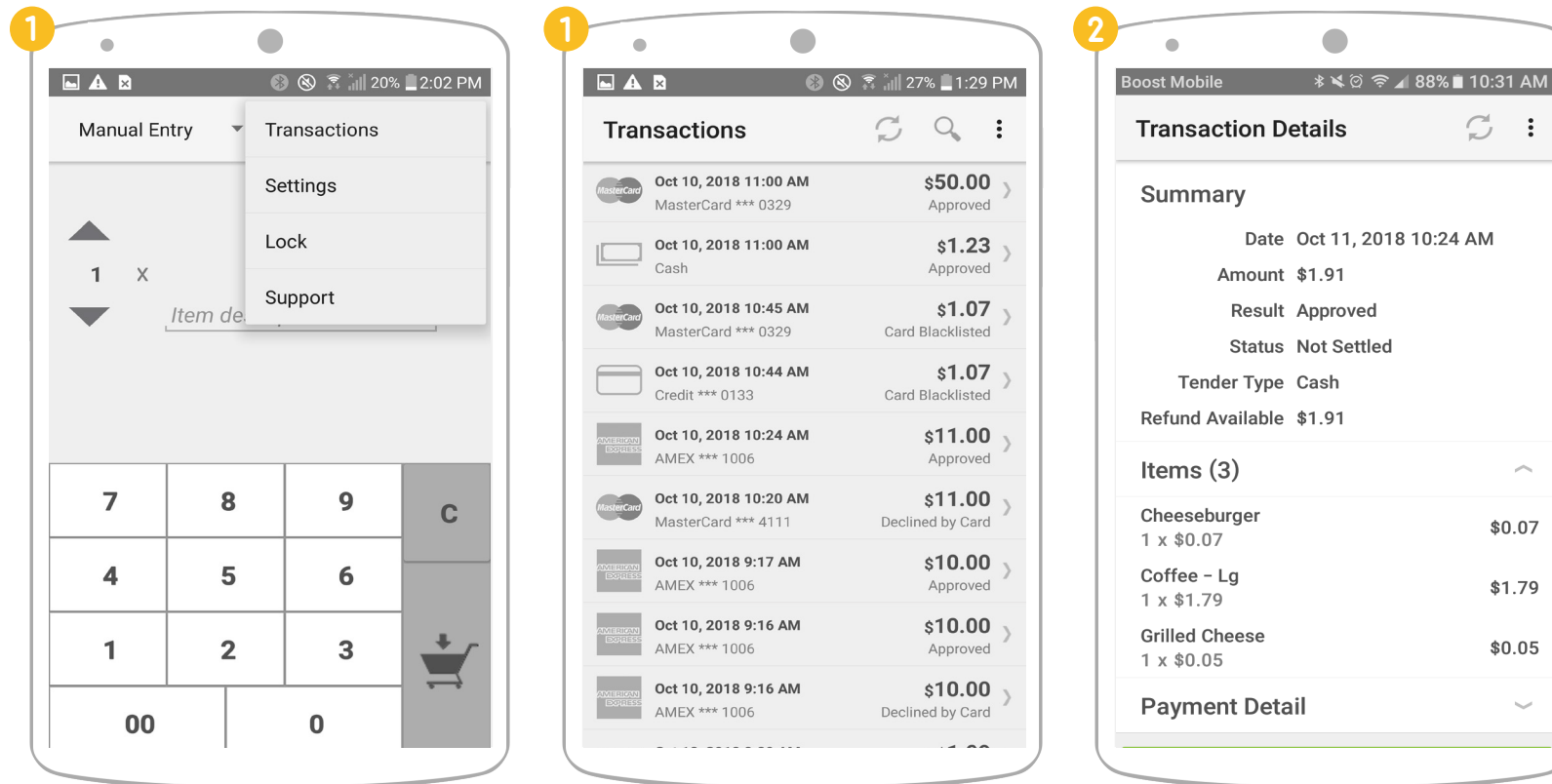
While processing with the RP457c, you have to unplug the card reader from your Android device to cancel the transaction.



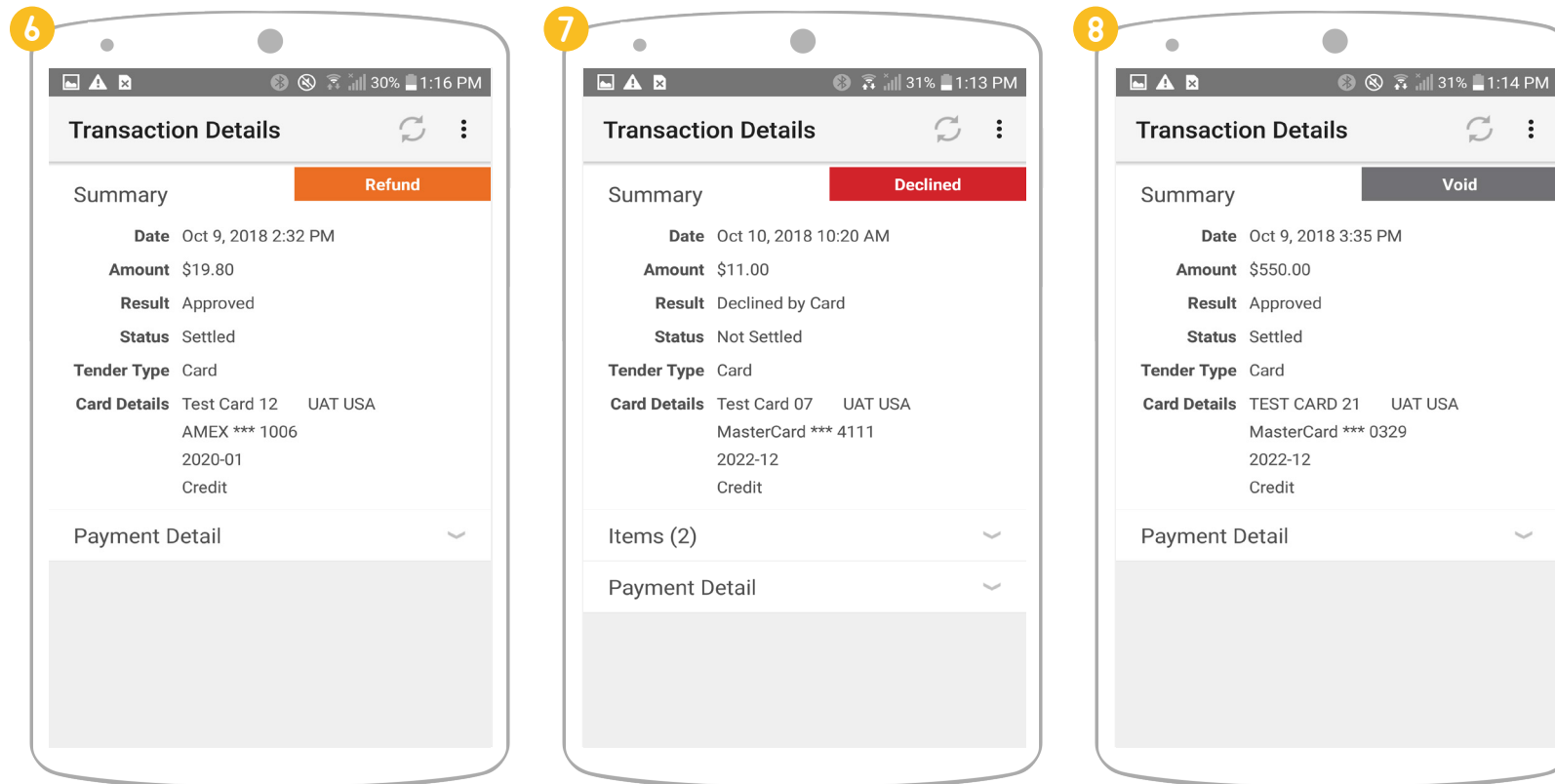
How do I look at the transaction history for purchases?

Transactions made with the Product Catalog register as individual transactions that list each line item.


1. Touch the **Menu Icon** and select **Transactions**. Then, touch the transaction you want to see details for.
2. To see individual line items for the transaction, touch the **Drop-Down Arrow** icon on the **Items** tab.
3. To see more payment details, touch the **Drop-Down Arrow** icon on the **Payment Detail** tab.
4. To see any notes associated with the transaction, touch the **Drop-Down Arrow** icon on the **Notes** tab.

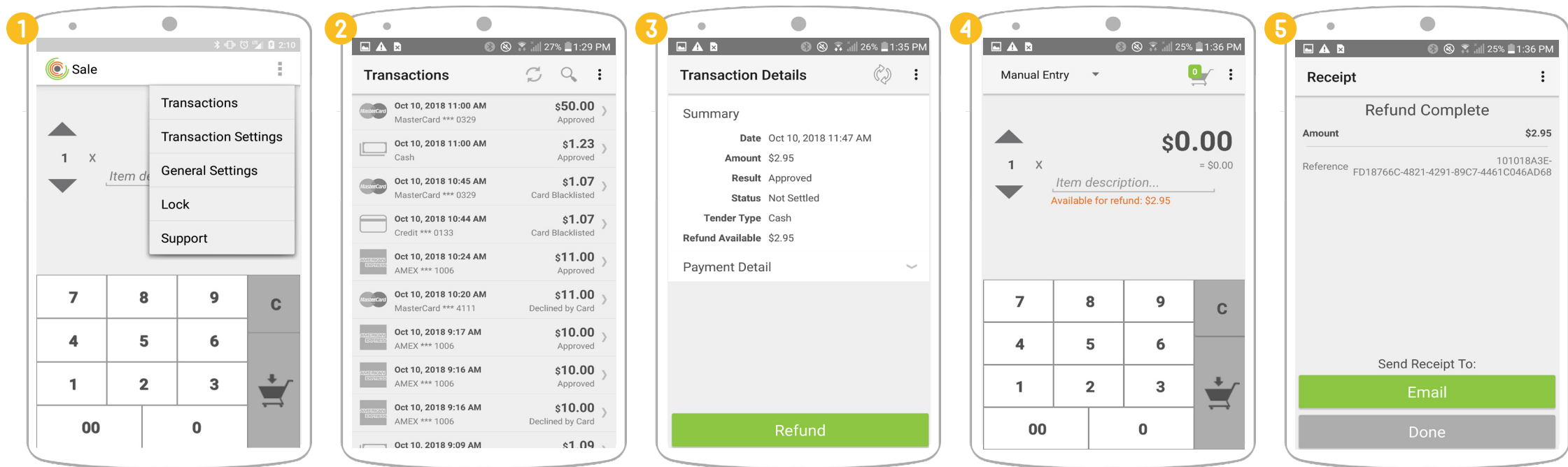


5. To see the signature associated with the transaction, touch the **Drop-Down Arrow** icon on the **Signature** tab.
6. If the transaction has a refund associated with it, a **Refund** label will appear at the top of the screen.
7. If the transaction failed to process or declined, a **Declined** label will appear at the top of the screen.
8. If the transaction was voided, a **Void** label will appear at the top of the screen.



How do I refund/void a transaction?

1. Touch the **Menu** icon  and select **Transactions** from the menu options.
2. From the transaction history list, select the transaction you want to refund/void.
3. On the **Transaction Details** page, depending on the status of the transaction, touch the green **Refund** or **Void** button at the bottom.
4. For refund, enter the amount to refund on the **Refund** page, which could be a partial or full refund, and then touch the green **Refund** button to confirm. For debit cards, you need to re-insert or re-swipe to issue the refund. For void, confirm that you want to void the entire transaction by clicking on the green **Void** button.
5. Once the refund is complete, the customer can choose to receive an email refund receipt by typing in his/her email address, or a paper receipt printed by a supported Bluetooth printer.



SECTION 3

BILLING & INVOICING FOR CONVERGE MOBILE



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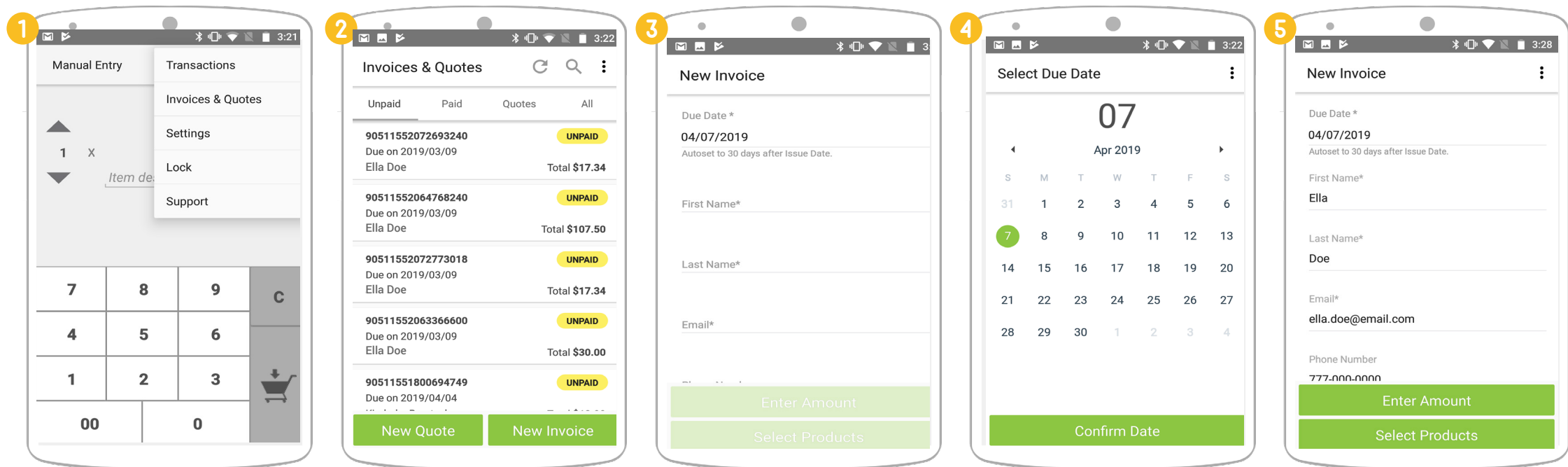
Converge Mobile 3.0 provides customers with the ability to create, view, edit and send invoices & quotes. To access the Billing & Invoicing feature for Converge Mobile, please contact customer service (**1-800-377-3962**) to enable the feature in Converge.

CONTENT





- 54 How do I create an invoice or quote?
- 58 How do I use an invoice or quote as a payment type?
- 59 How do I search for an invoice or quote?
- 61 How do I send a reminder for an unpaid invoice?
- 62 How do I edit an invoice or quote?
- 63 How do I cancel an invoice or quote?
- 64 How do I setup Billing & Invoicing in Converge?

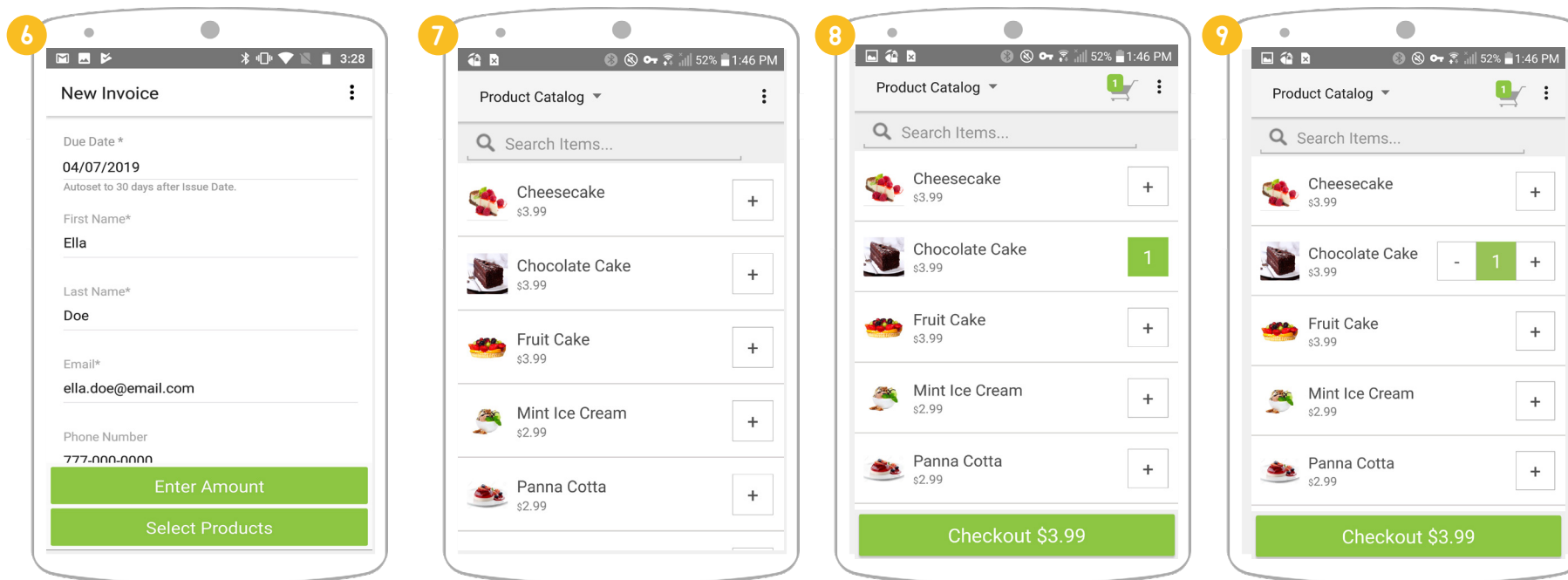
How do I create an invoice or quote?

1. Touch the **Menu**  icon at the top of the screen. Select **Invoices & Quotes** from the menu options.
2. Press the **New Invoice** button to create a new invoice. Press the **New Quote** button to create a new quote.
3. To specify the **Due Date** of the invoice or quote, touch the due date field.
 The default due date is set to 30 days from the issue date but can be modified in Converge (refer to [page 65](#)).
4. Touch the date on the calendar in order to select it. Use the **<** **>** to navigate to another month. Once you have selected a date, touch the **Confirm Date** button.
5. Enter the required customer fields.







Multiple items can be added from the Converge Product Catalog to an invoice or quote. To add/remove items to/from an invoice or quote, follow the steps below:

6. Touch the **Select Products** button.
7. In the **Product Catalog**, touch the **Plus** button  next to the item you would like to add to the invoice or quote.
8. Touch the **Number** button  next to the item to open quantity edit options.
9. Add or remove additional copies of the selected item by touching the **Plus**  or **Minus**  buttons next to the current item quantity (refer to [page 24](#)).

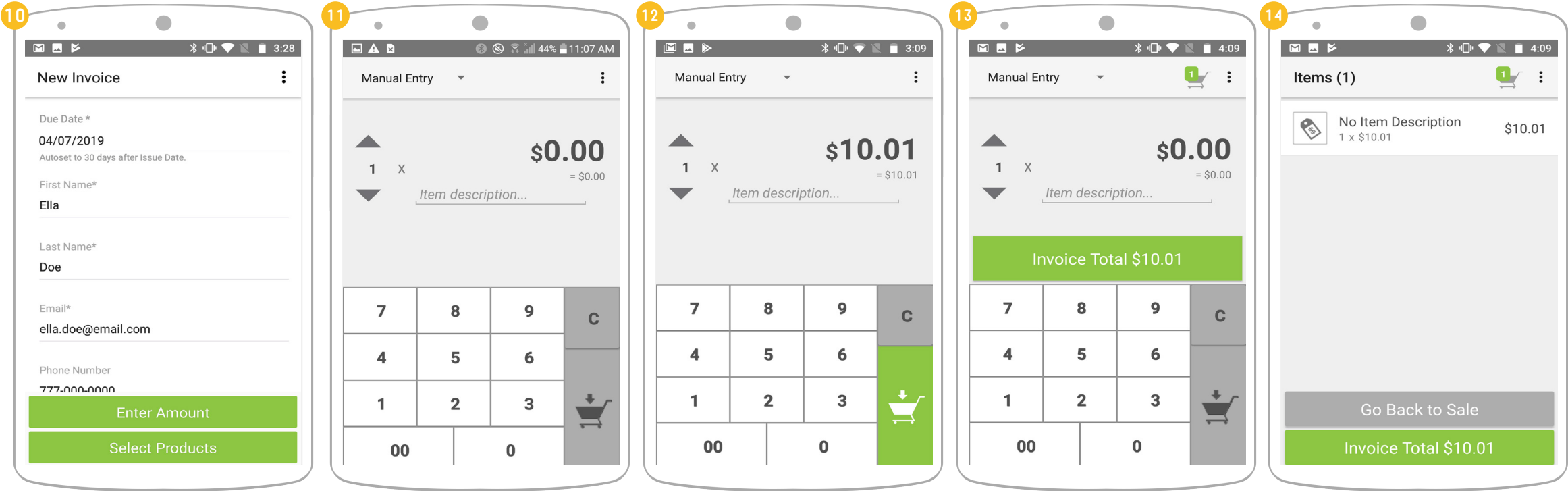




You can also manually add items to an invoice or quote by following the steps below:

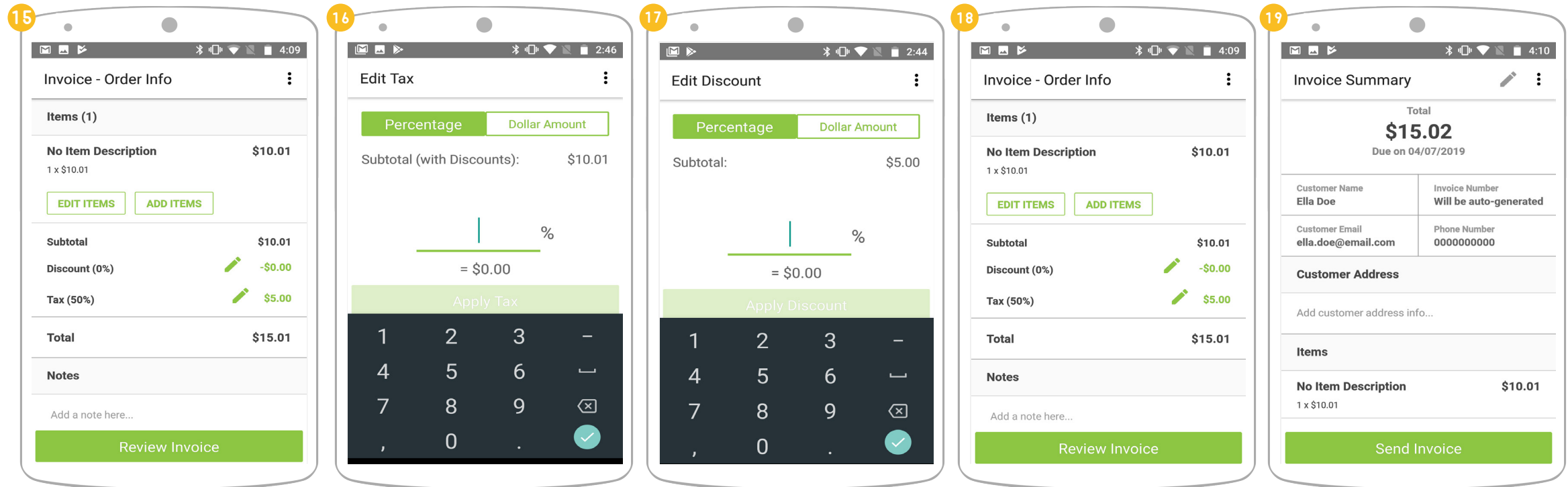
- 10. Touch the **Enter Amount** button.
- 11. To set a price for the item, type in the item price. To enter a description for the item, touch the description field.
- 12. Touch the **Up**  or **Down**  arrows to increase or decrease the quantity. Touch the **Add to Cart**  button to add it to the current invoice or quote.
- 13. Touch the **Shopping Cart**  icon on the top right corner to review items.

After adding products to the invoice or quote:

- 14. Touch the **Invoice Total** or **Quote Total** button at the bottom of the screen to review the details.



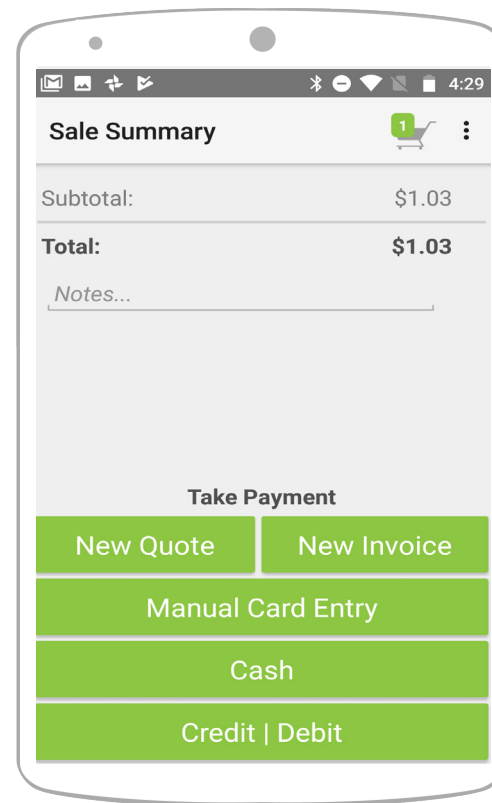
15. Touch the **Edit Items** button to edit the quantity of an item or remove an item from the invoice or quote. Touch the **Add Items** button to return to the Product Catalog and select additional products to add to the invoice or quote.
16. You can edit sales tax for each individual invoice or quote without changing the default tax percentage or amount. Touch the **Edit Tax**  icon on the **Review Invoice** or **Review Quote** screen. Enter tax percentage/ amount as desired.
17. To apply a discount to an invoice or quote, touch the **Edit Discount**  icon on the **Review Invoice** or **Review Quote** screen. Enter discount percentage/amount as desired.
18. When you have completed changes on this screen, touch the **Review Invoice** or **Review Quote** button.
19. Touch the **Add customer address info** field to enter customer address information.
20. Touch the **Send Invoice** or **Send Quote** button to email the invoice or quote to the customer.





How do I use an invoice or quote as a payment type?

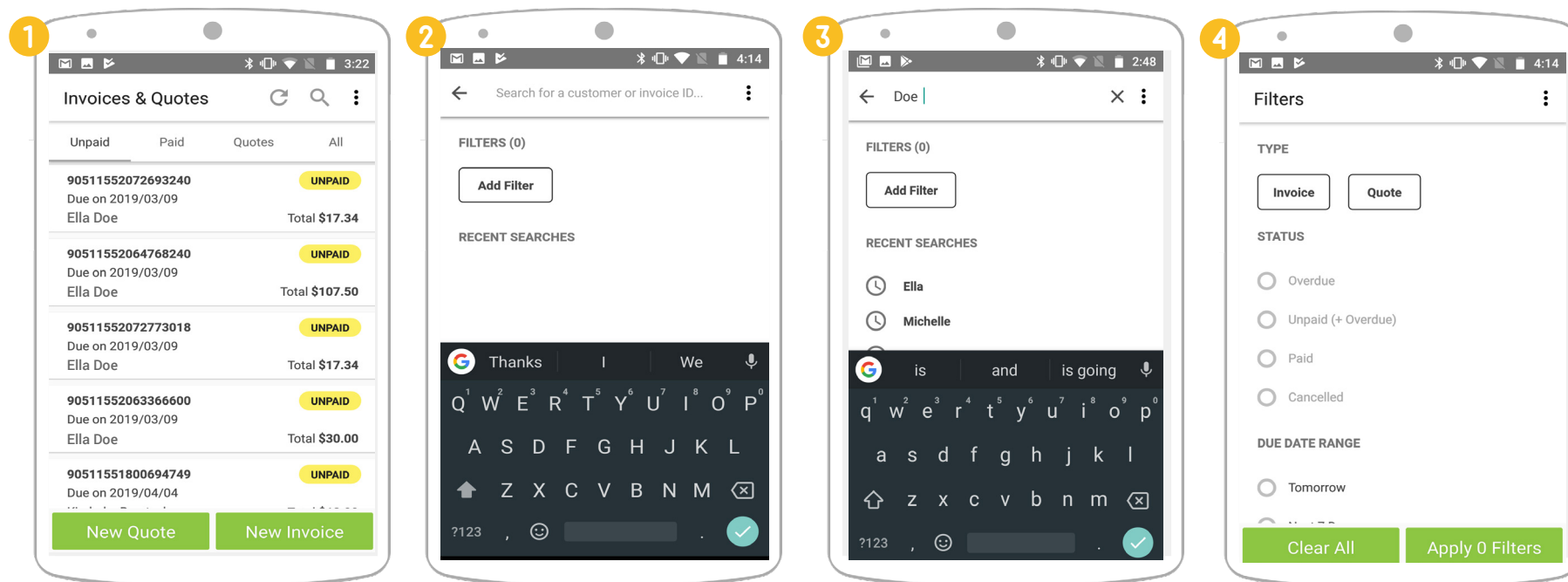
The Billing & Invoicing feature must be enabled in Converge in order for New Invoice and New Quote to be listed as a payment type on the Sales Summary screen in Converge Mobile.

After adding items to the transaction, touch the **New Invoice** or **New Quote** button under the Sales Summary screen to create the invoice or quote.

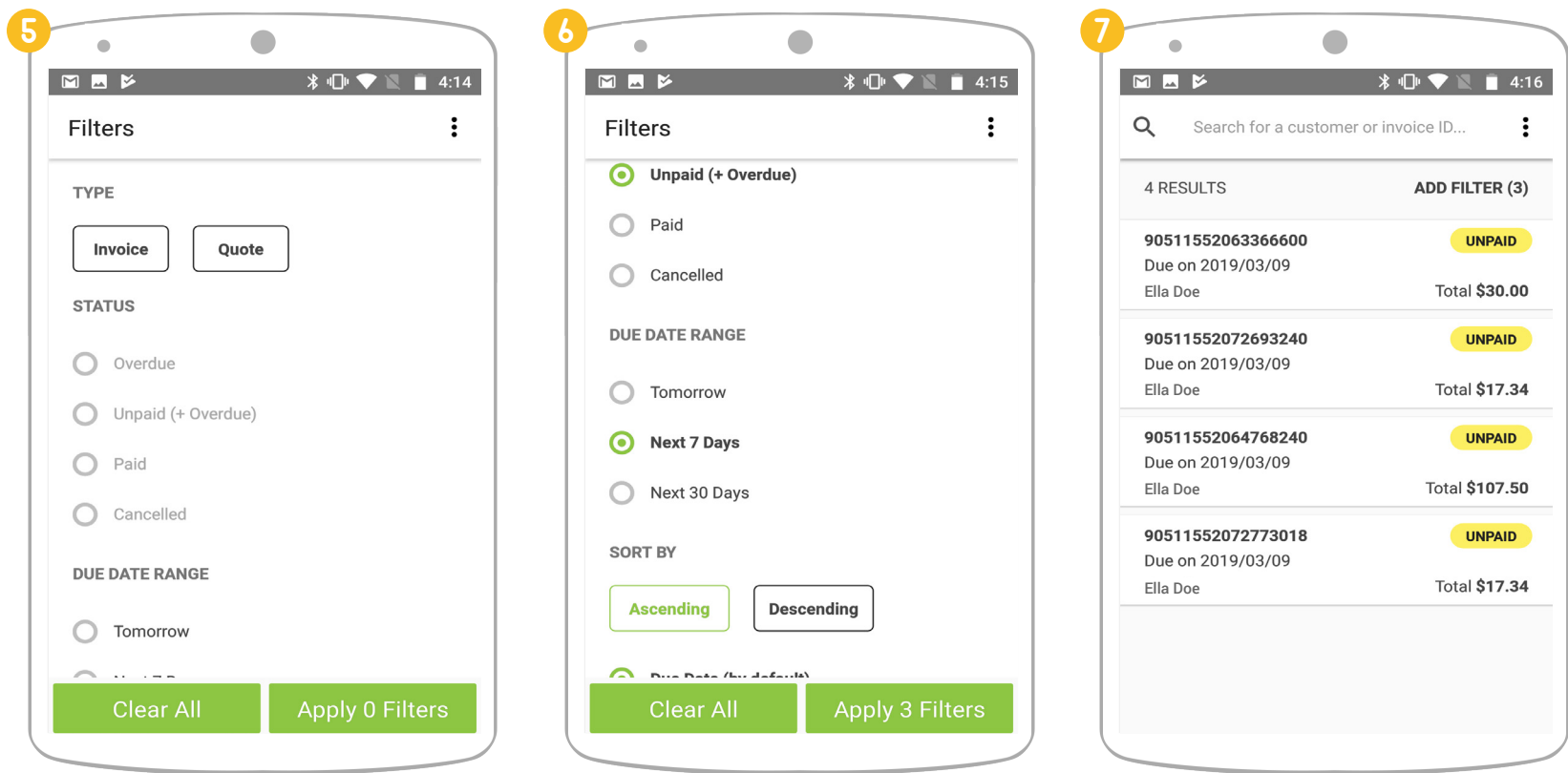


How do I search for an invoice or quote?



1. In **Invoices & Quotes**, touch the **Search**  icon at the top of the screen.
2. Touch the **Search Field** near the top of the screen.
3. Enter the customer first name, last name or invoice/quote number you want to search for. The search can be performed based on partial criteria.
 If your search returned many results, you can apply filters to narrow the number of results displayed.
4. Touch the **Add Filters** button on the top of the screen.

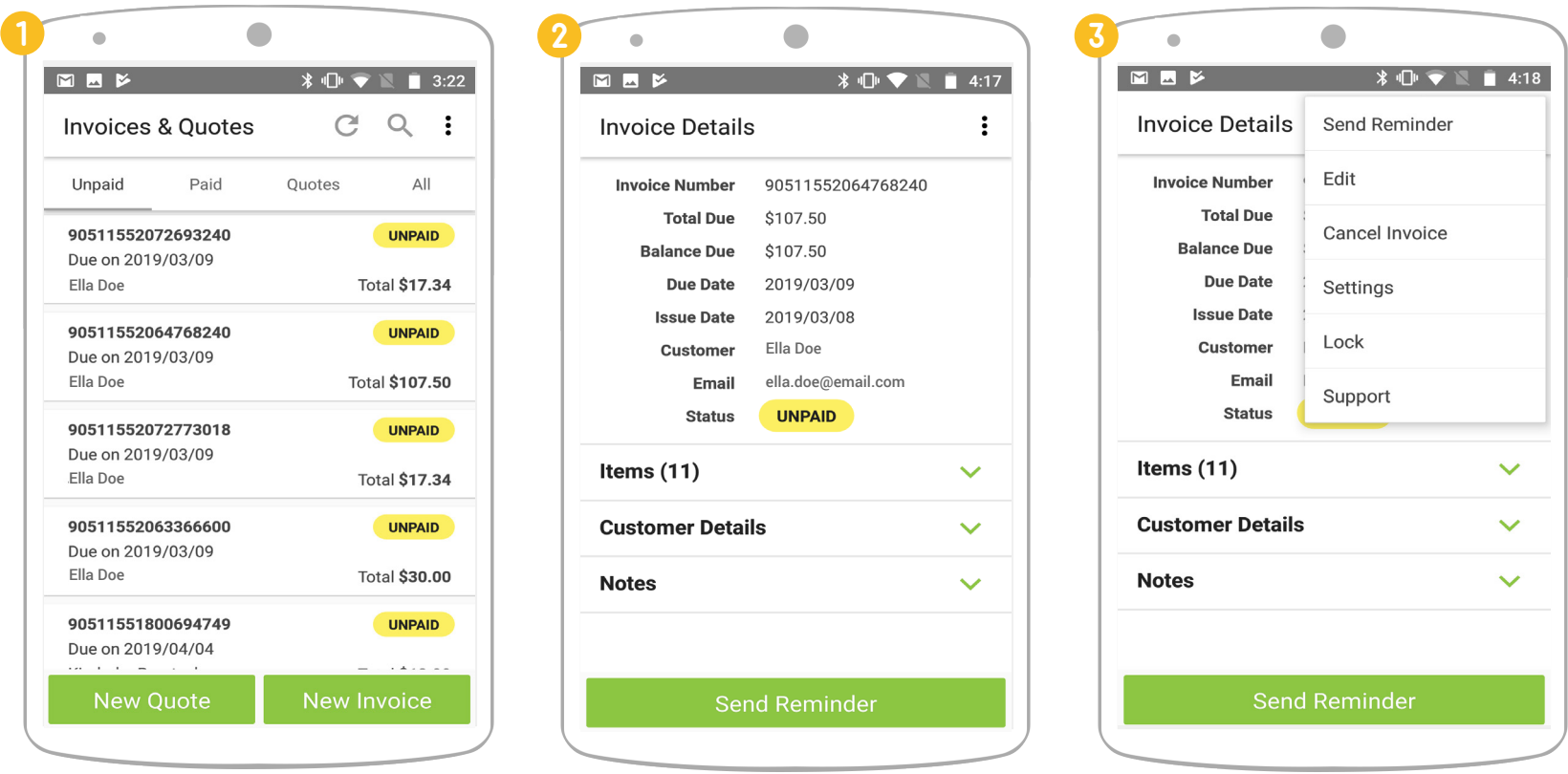


- 5. On the **Filters** screen, select the filters you would like to apply from **Type**, **Status** and/or **Due Date Range**.
- 6. To sort the results, select the criteria you would like the results sorted by then select either the **Descending** or **Ascending** button to display results in that order.
- 7. Touch the **Apply Filters** button, and you will see the results updated on the **Results** screen.





How do I send a reminder for an unpaid invoice?

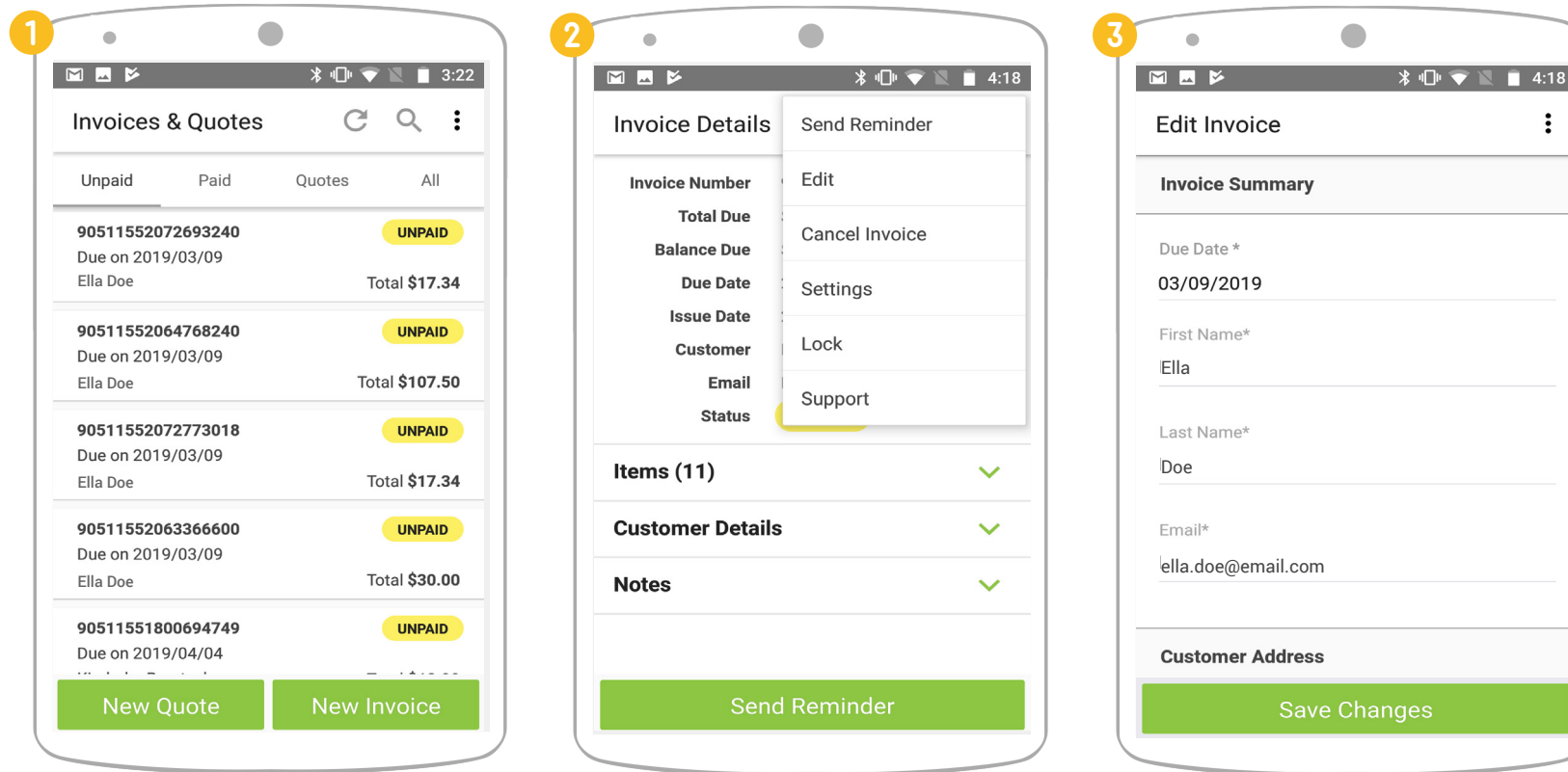
- 1. In the **Invoices & Quotes** screen, touch the invoice you would like to select.
 - 2. Touch the **Send Reminder** button to send an email to the customer.
 - 3. You can also touch the **Menu**  on the top right corner of the **Invoice Details** screen, then select **Send Reminder**.
-  You can customize the reminder email and set a reminder email to automatically be sent prior to the due date or once an invoice is late in Converge.



How do I edit an invoice or quote?

1. In the **Invoices & Quotes** screen, touch the invoice or quote you would like to select.
2. Touch the **Menu**  on the top right corner of the **Invoice Details** or **Quote Details** screen, then select **Edit**.
3. Once you have made your changes, touch the **Save Changes** button.


 The revised invoice or quote will be sent to your customer automatically.

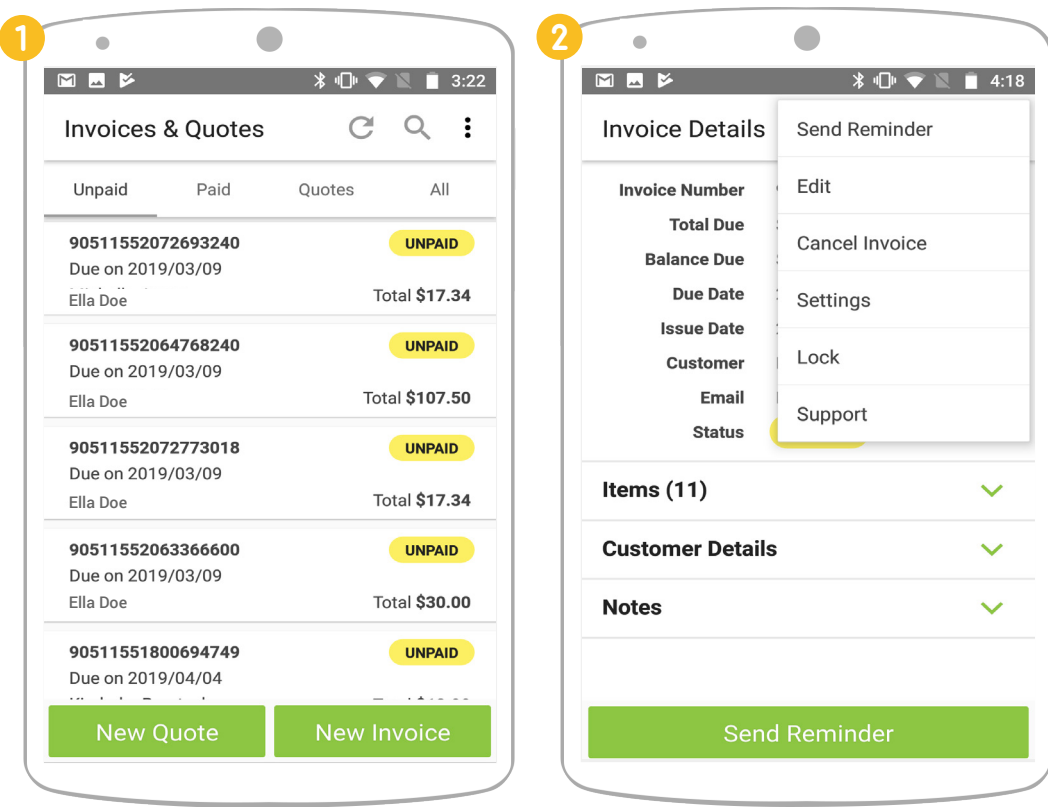


How do I cancel an invoice or quote?

1. In the **Invoices & Quotes** screen, touch the invoice or quote you would like to select.

2. Touch the Menu  on the top right corner of the **Invoice Details** or **Quote Details** screen, then select **Cancel**.

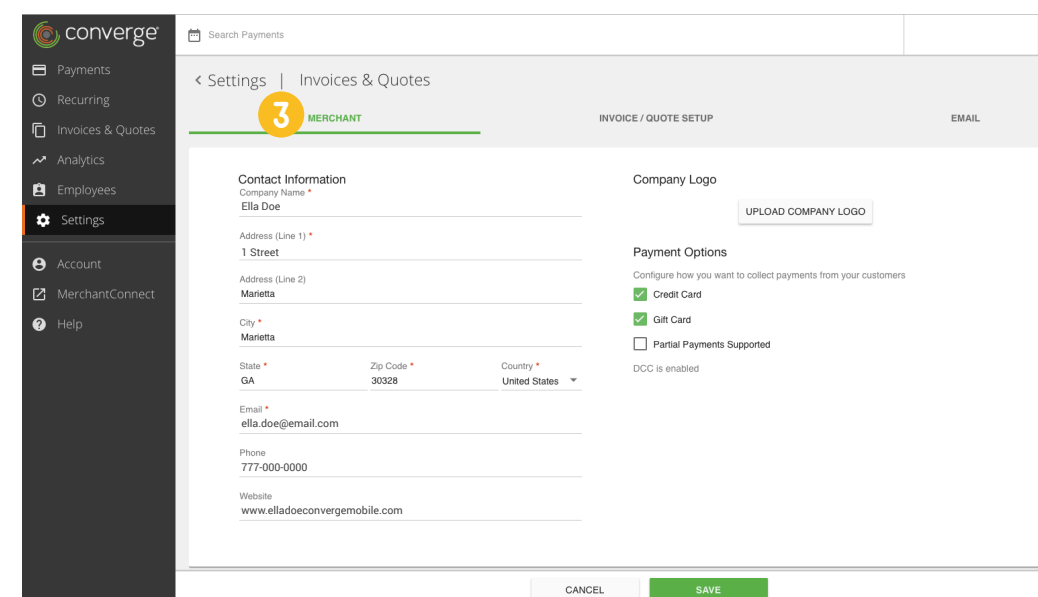
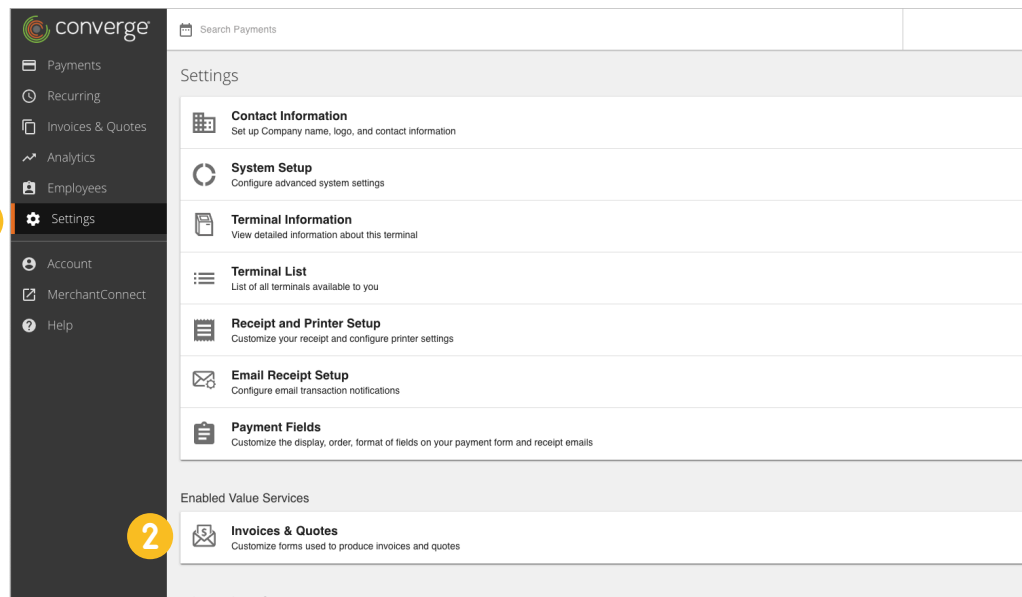
 Once you have confirmed cancellation, a cancellation email will be sent to your customer automatically. You can customize the cancellation email in Converge.





How do I setup Billing & Invoicing in Converge?

Create unique invoices and quotes with ease using Billing and Invoicing. Options include: Add your company logo, adjust colors, update your return policy, customize emails and more! Complete Billing and Invoicing setup by logging into [Converge](#) with your account credentials.

1. Navigate to the **Settings** window by clicking **Settings** in the left menu bar.
2. Click the **Invoices & Quotes** button.
3. Your company information is auto-populated on the **Merchant** tab. You can edit any of those fields and upload an image. Click the **Save** button after making your changes.



- To customize the appearance of your invoices and quotes, you can select from general themes or enter custom color code values (#0000FF) and select from available fonts.
- To set a **Default Tax**, toggle the **Default Tax On/Off** switch  and specify a tax percentage or fixed amount.
- To enable two-step customer authentication, toggle the **Customer Authentication On/Off** switch . Click on an authentication method in each dropdown menu to select it.
- To modify the **Invoice Due Date**, click in the **Days** field and enter the number of days in which your invoice is due after the issue date. To modify the **Custom Invoice Terms**, click in the text field and enter the message you would like to display on your invoices.

converge

Payments

Recurring

Invoices & Quotes

Analytics

Employees

Settings

Account

MerchantConnect

Help

Search Payments

Settings

Invoices & Quotes

MERCHANT

Ella Doe

1st Street,

Marietta, GA, 30328

ella.doe@email.com

777-000-0000

BILL TO

Full Name

Email

Company

Address (Line 1)

Address (Line 2)

City , State

Zip Code

Country

CC EMAIL

CC Email Recipients

SHIP TO

Full Name

Email

Company

Address (Line 1)

Address (Line 2)

City , State

Zip Code

Country

INVOICE / QUOTE SETUP

INVOICE

Amount Due

\$0.00

ISSUE DATE

Issue Date

DUE DATE

Due Date

EMAIL

Themes

Customize Theme

Main Color

Primary Font Color

Secondary Font Color

#dedede

#000000

#555555

Font

Helvetica

Default Tax

Enable your customers to authenticate themselves before viewing an invoice or quote making a payment

Select two authentication methods:

Authentication Method 1

Authentication Method 2

Email Address

Last Name

Override Email Requirement

Allow for quotes/invoices to be created without a customer's email address

Invoice Terms

days

Invoice due 30 days after issue date

ORDER DETAILS

Product / Description	Product Code	Quantity	Unit Price	Amount
Product Name	Product Code	Quantity	Unit Price	
Subtotal				\$0.00
Total				\$0.00

INVOICE TERMS

Full amount due in 30 days from issue date

CANCEL

SAVE

65

-
-
-
-
-
-
8. You must enter a return policy to complete setup of **Invoices & Quotes** in Converge. To modify the **Return Policy**, click in the text field and enter the message you would like to display on your invoices.
9. To display invoice terms on a quote, toggle the **Include Invoice terms as quote terms On/Off** checkbox.
10. To modify the quote expiration date, click in the **Days** field under **Quote Due Date**, and enter the number of days in which your quote expires after the issue date. To modify the **Custom Quote Terms**, click in the text field and enter the message you would like to display on your quotes.
11. Click on the **Email** tab to customize your emails for invoices, quotes, reminders and cancellations.

converge

Payments

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Help

Search Payments

Address (Line 2)
City , State
Zip Code
Country
CC EMAIL
CC Email Recipients

Address (Line 2)
City , State
Zip Code
Country

Issue Date

DUE DATE
Due Date

ORDER DETAILS

Product / Description Product Name	Product Code Product Code	Quantity Quantity	Unit Price Unit Price	Amount \$0.00
---------------------------------------	------------------------------	----------------------	--------------------------	------------------

INVOICE TERMS

Full amount due in 30 days from issue date

Subtotal

\$0.00

Total

\$0.00

Paid

\$0.00

Amount Due ()

\$0.00

Default Tax

Customer Authentication (strongly recommended)

Enable our customers to authenticate themselves before viewing an invoice or quote making a payment

Select two authentication methods:

Authentication Method 1 *
Email Address

Authentication Method 2 *
Last Name

Override Email Requirement

Allow for quotes/invoices to be created without a customer's email address

Invoice Terms

days *

Invoice due 30 days after issue date

Custom Invoice Terms

Full amount due in 30 days from issue date

8

Return Policy

Return Policy *

9

Quote Terms

☐ Include Invoice terms as quote terms

☐ Set due date for quote

Custom Quote Terms

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CANCEL

SAVE

[Payments](#)
[Recurring](#)
[Invoices & Quotes](#)
[Analytics](#)
[Employees](#)
[Settings](#)
[Account](#)
[MerchantConnect](#)
[Help](#)

< Settings | Invoices & Quotes

MERCHANT
INVOICE / QUOTE SETUP

INVOICE

QUOTE

REMIINDER

LATE REMINDER

QUOTE CANCELLED

INVOICE CANCELLED

GROVE TEST has sent you an invoice

Dear Customer First Name,

You have been sent an invoice [invoice #]for \$[amount] that's due on [due date]. Please find details of this invoice below.

INVOICE DETAILS	
Billed To	[customer full name]
Invoice No.	[invoice number]
Customer No.	[customer number]
Invoice Amount	[invoice amount]
Due Date	[invoice due date]

GROVE TEST

PAY INVOICE

CANCEL

SAVE

11 EMAIL

Subject *

New Invoice

Address Customer as

First Name

Header Text

Footer Text

Edit Button Message *

Pay Invoice

SECTION 4


FREQUENTLY ASKED QUESTIONS

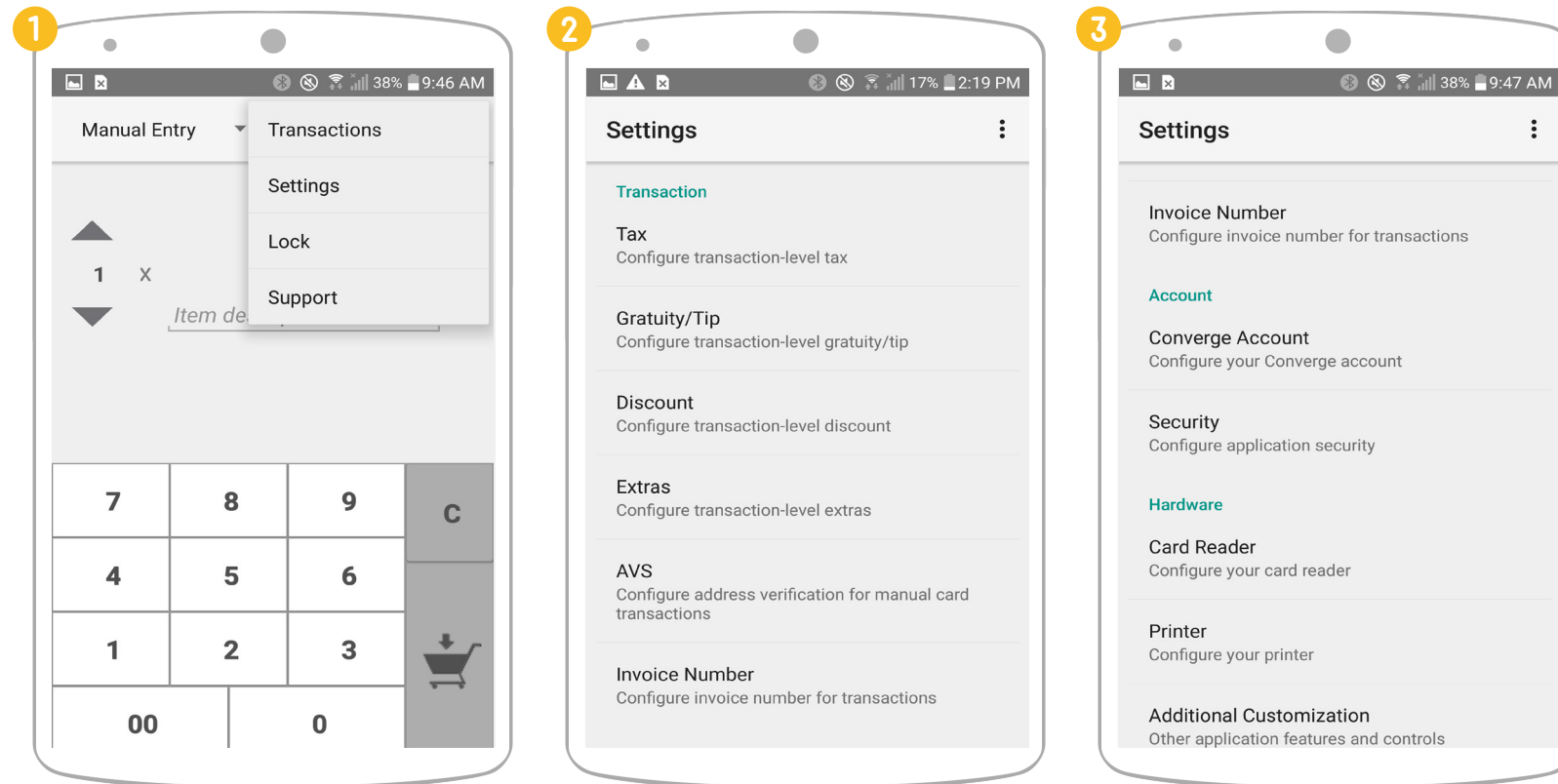
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- 77 How do I import an item to the Converge Product Catalog?

How do I change Converge Mobile settings?

In Converge Mobile, touch the **Menu**  icon. You will see **Settings** where you can onfigure transaction-related setup such as tax, discount or gratuity, and customize app settings.

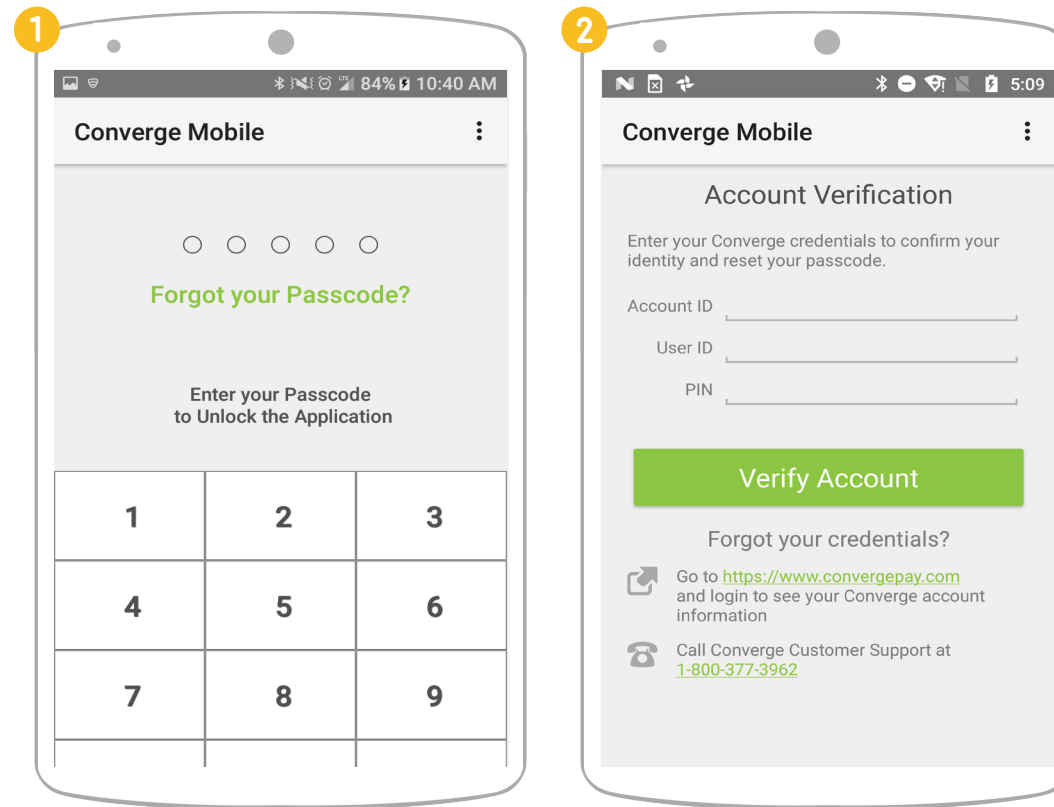


1. **Tax** - The Tax option allows you to enable/disable tax and customize default tax percentage. Please refer to “**How do I modify tax settings and specify tax for a transaction?**” on [page 25](#) for details.
2. **Gratuity/Tip** - The gratuity option allows you to enable/disable gratuity and set the quick gratuity values in either currency amount or percentage. Please refer to “**How do I modify gratuity settings and specify gratuity for a transaction?**” on [page 28](#) for details.
3. **Discount** - The discount option allows you to enable/disable discount and set the discount increments in either currency amount or percentage. Please refer to “**How do I modify discount settings and specify a discount for a transaction?**” on [page 27](#) for details.
4. **Account** - The account section is where your Converge Mobile credentials are stored. If your credentials change, you can update them here.
5. **Card Reader** - The card reader section displays your connected card readers. You can also connect new card readers from here. Selecting that option will launch the card reader connection wizard.
6. **Printer** - The printer option allows you to enable receipt printing, connect your printer, and test the printer connection.
7. **Business Profile** - The business profile section shows the business name that will appear on receipts. You can change this name by logging into Converge - <http://www.convergepay.com>.
8. **Security** - In the security menu, you can change your passcode for the Converge Mobile application.
9. **Additional Customization** - In the Additional Customization menu, you can enable or disable sounds.

How do I reset my 5-digit app unlock passcode?

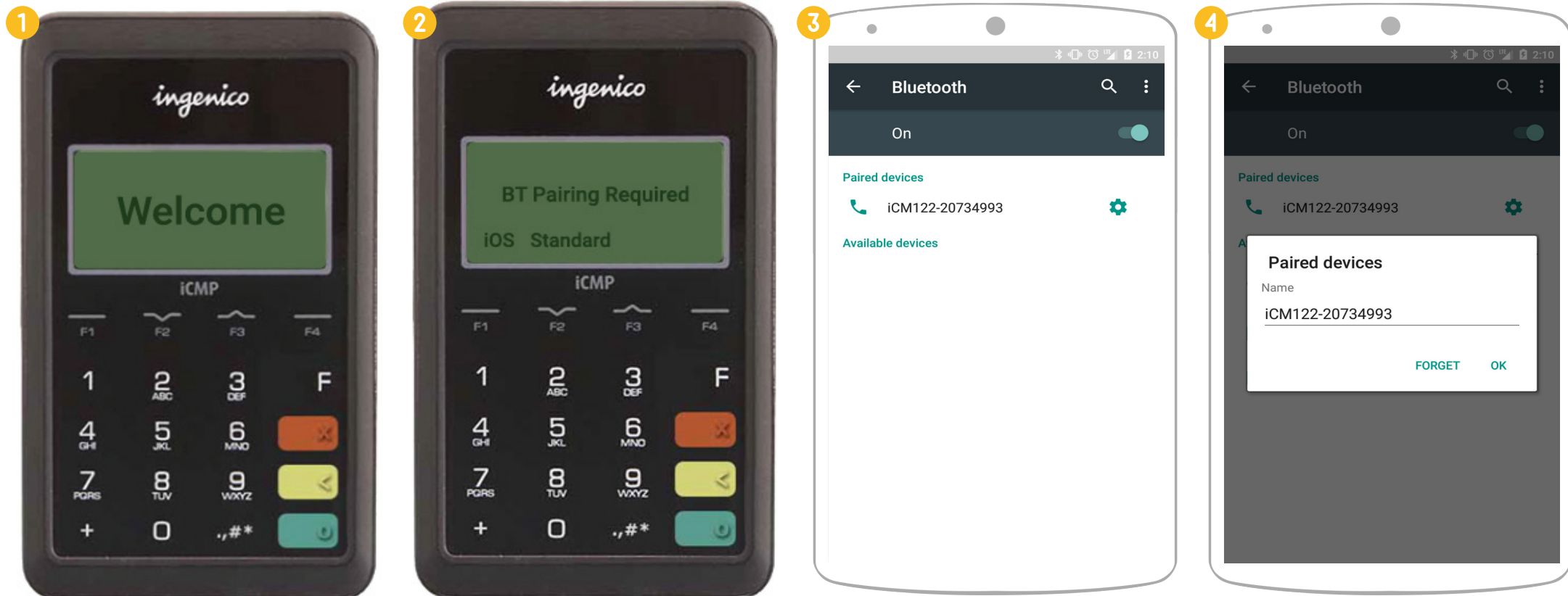
If you forgot your 5-digit app unlock passcode, touch the **Forgot Your Passcode** link on the app unlock screen, and re-enter your Converge Mobile credentials to reset the passcode.

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How do I disconnect the iCMP PIN pad and my Android mobile device?

1. To disconnect all paired devices from the iCMP PIN pad, press the **F** button rapidly four times ("F-F-F-F").
2. The iCMP will reboot and display **BT Pairing Required** on the screen.
3. On your Android mobile device, navigate to the **Bluetooth** settings. Then select your iCMP PIN pad from the **Paired devices** list.
4. Touch the **Forget** option to disconnect the PIN pad from your mobile device when it prompts.







How do I reset the iCMP PIN pad to Bluetooth pairing mode?



Your iCMP PIN pad will likely come to you set to Bluetooth pairing mode. If you used the device with Converge and set it to USB mode, you will need to return to Bluetooth mode to be able to use it with a mobile device again.

1. Restart the iCMP by powering it off then back on (hold the hash or pound key  and the **yellow back**  button until it powers off). When the booting screen appears, press **2-6-3-4** on the keyboard followed by the **green confirmation**  button. **Please note**, this must be done in the **2 minute** time frame before the card reader finishes booting and this screen goes away.
2. If performed successfully, you should see a request to press **F**  button to get to the **Menu**. If you do not see this menu, reboot the device by holding the power button and repeat the previous steps.



3. Using the **F2**  and **F3**  buttons as arrows, highlight **Option 3 - TDA** and press the green **confirmation**  button.
4. On the TDA menu, highlight **Option 0 - Configuration** and press the green **confirmation**  button.
5. On the Configuration Menu, select **Option 0 - Communication**.
6. On the Communication menu, select **Option 0 - Select Comm. Type**.




7. On the **Comm. Selection** screen, select **Bluetooth** then press the green **confirmation**  button.
8. Press the yellow **Back**  button four times, going through each of the previous menus. After you have exited all the menus you will see a prompt to save and reboot.
9. Once rebooted, you will select **iOS** for Apple devices or **Standard** for Android devices. Please refer to “**How do I connect an iCMP PIN pad during first-time setup?**” on page 7.

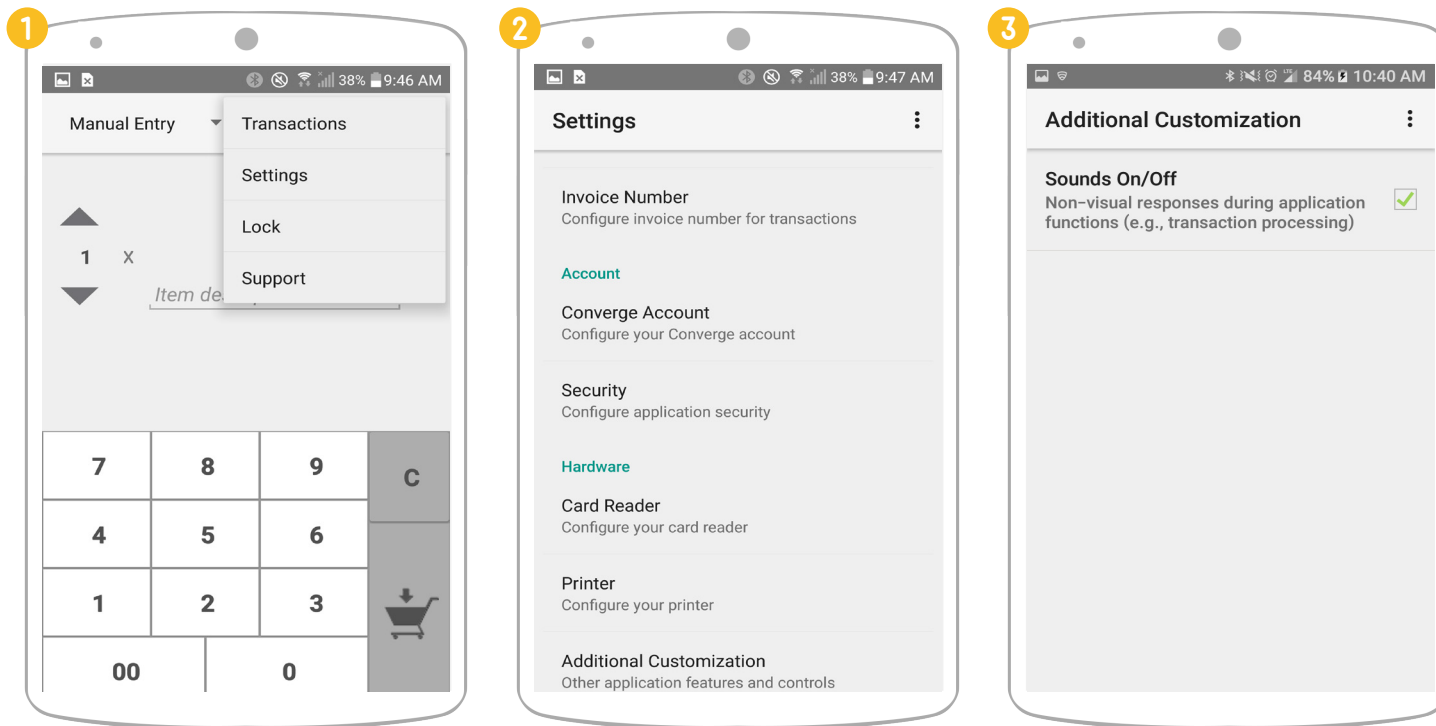


What if I select the wrong pairing option for the iCMP PIN pad?

If you select the wrong pairing option (“**iOS**”) when you were trying to pair an Android device (the “**Standard**” option), reboot the iCMP by holding the power button until it chimes. Then begin the setup process again. **Please note**, it takes about a minute for the iCMP to reboot.

How do I disable sound in Converge Mobile?

1. Touch the **Menu**  icon and select **Settings**.
2. Select **Additional Customization**.
3. Toggle the **Sounds ON/OFF** switch to enable/disable sound.

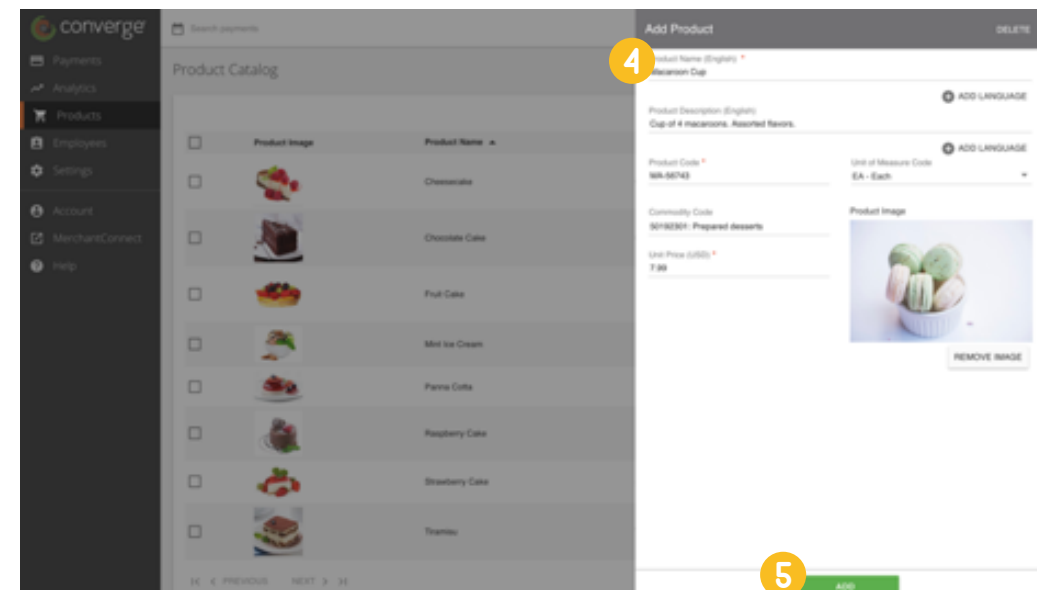
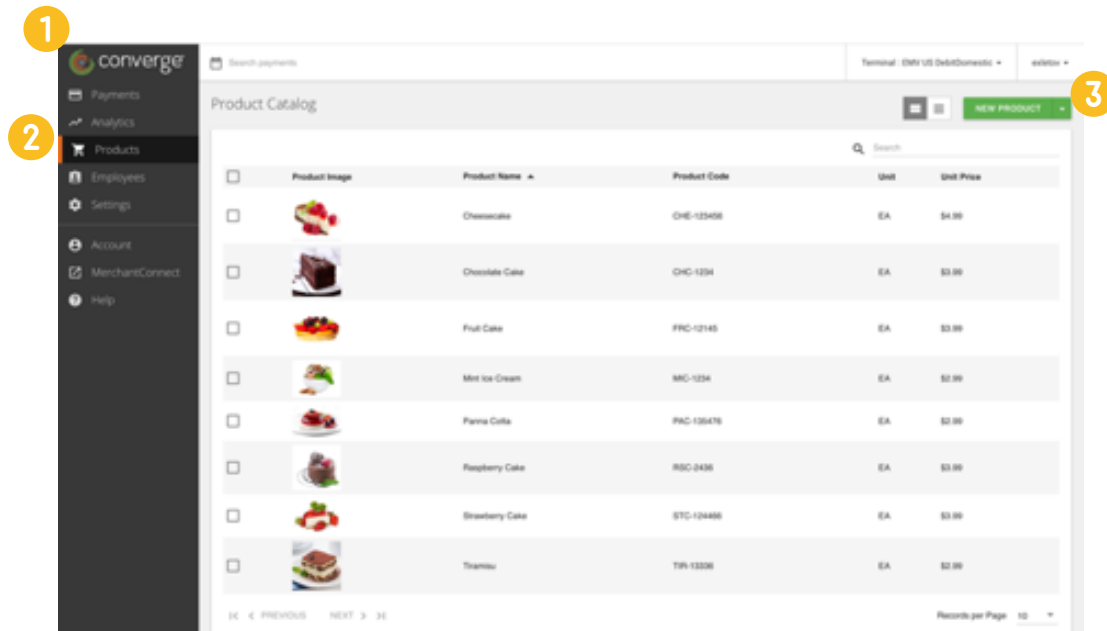


How do I add an item to the Converge Product Catalog?

Before you can use the catalog in Converge Mobile, you need to add products to the catalog. To add products to the catalog, complete the following steps:

1. Open the **Converge UI**.
2. Navigate to the products window by clicking the **Products** tab.
3. Click the **New Product** button.
4. Fill each of the fields with information on the product. You can also set product names and descriptions in more than one language.
5. Click the **Add** button to finish adding the product to the Product Catalog

💡 If you do not immediately see your new products in your Converge Mobile device's product catalogue, refresh the device.



How do I import an item to the Converge Product Catalog?

You can create products for the Converge Product Catalog as CSV or XML files. To import items into the Product Catalog, complete the following steps:

1. Open the **Converge UI**.
2. Navigate to the products window by clicking the **Products tab**.
3. Click the **Drop-Down** ▼ arrow on the New Product button, then click Import Product. This window links to our .CSV and .XML templates.
4. Open the file selection window by clicking the **Choose File** button. Then, select a file to import from your computer.
5. Start the import by clicking the **Import** button.

💡 If you do not immediately see your new products in your Converge Mobile device's product catalogue, refresh the device.

