

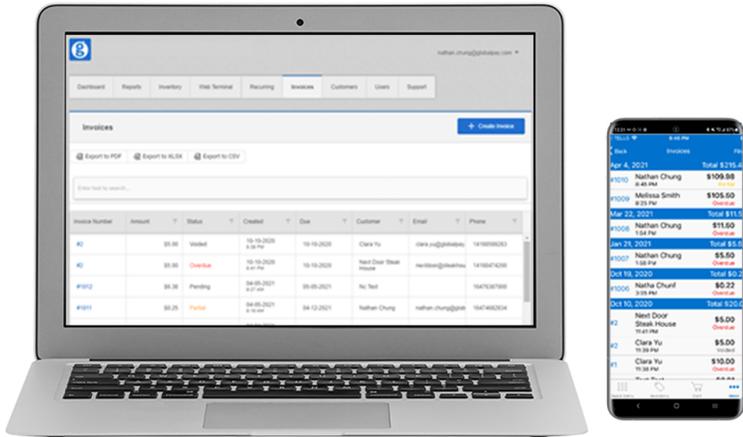
Payments

User Guide

Mobile Pay Online

Invoicing

Simple online invoicing to get paid fast.



globalpayments Innovation that delivers.

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Mobile app

The Mobile Pay app is available on both Android™ and iOS®. The interface will automatically adjust the scale depending on the device size – tablet or phone. You can find the Mobile Pay app in your device’s app store by searching “[Mobile Pay Global Payments CA](#)”.

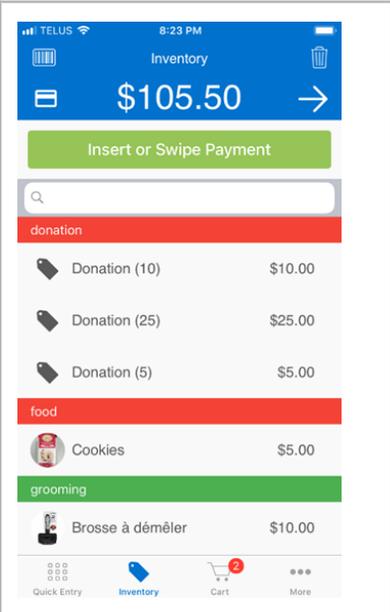
NOTE: The app language will automatically be in English or French based on your device’s language setting. To change the app language, first, change your device’s language and relaunch the Mobile Pay app.

This app can be used for both card-present and card-not-present transaction processing. If you would like to find out more about card-present options, please contact your Global Payments account representative.

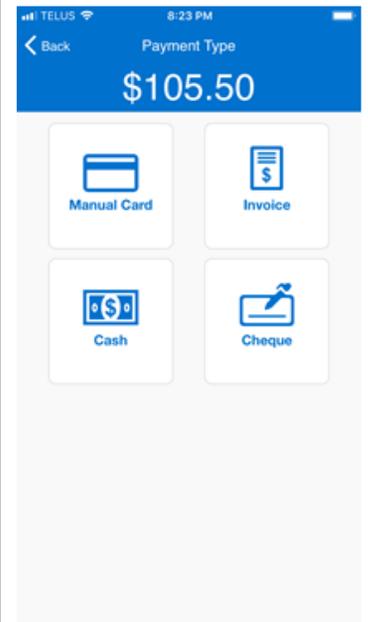
Invoice management

Creating an invoice in-app

Step 1: Add the items to the cart and tap the arrow button.

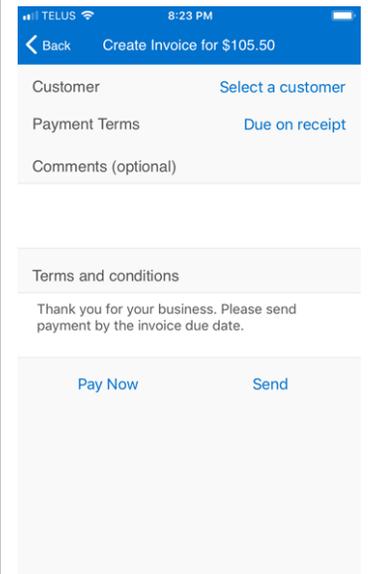


Step 2: Select Invoice



Step 3: Invoice screen displays. Please see below for each option’s function:

- Select a customer** allows you to select an existing customer or create a new customer.
- Payment Terms** allow you to define when the invoice is due.
 - Due on receipt
 - 1 week
 - 2 weeks
 - 1-month
 - Custom – choose a date
 - Cancel

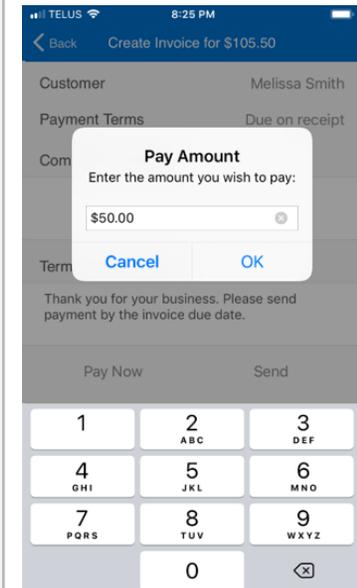
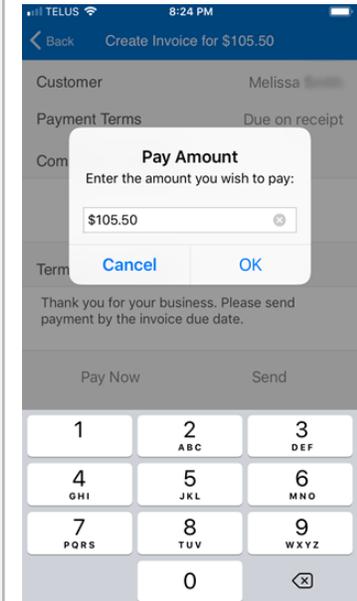


- c. **Comments** is an optional field for you to add comments
- d. **Terms and conditions** are editable
- e. **Pay now** triggers screens to accept Partial card present payments presented on the invoice. And it will also send the invoice to the selected customer. Please see the [Partial card-present payments section](#) for detailed instructions.
- f. **Send** option sends the invoice to the customer. When the customer's email and SMS contacts are both on file, the default option is to send out the invoice by email.

Partial card-present payments on an invoice

Step 1: When the **Pay Now** option is selected on the invoice screen, confirm the amount the customer would like to pay and select **OK**.

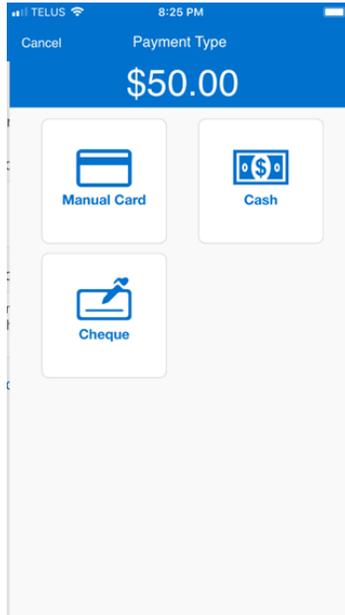
By default, the screen presents the full invoice amount, but you can enter a lower amount if the customer would like to pay a portion of the invoice first.



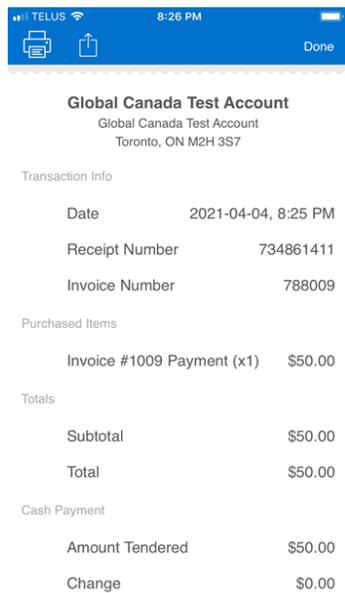
Step 2: The app will now prompt for the method of payment. The Payment options presented vary based on your Mobile Pay solution setup.

Card payments – This option will be available if you have chosen the Mobile Pay solution that comes with a card reader – Mobile Pay Plus or Mobile Pay Register Plus

Cash/Cheque – These options will only be available if cash or cheque have been enabled on your account.

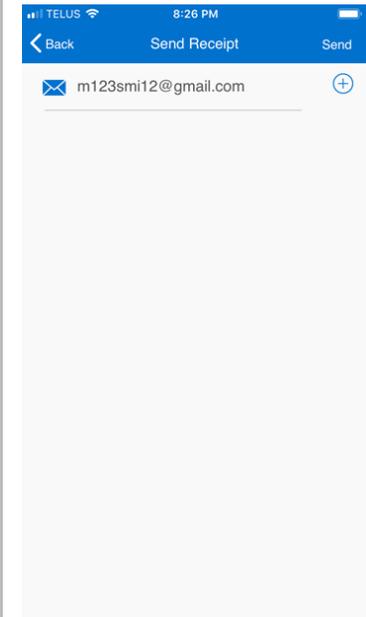
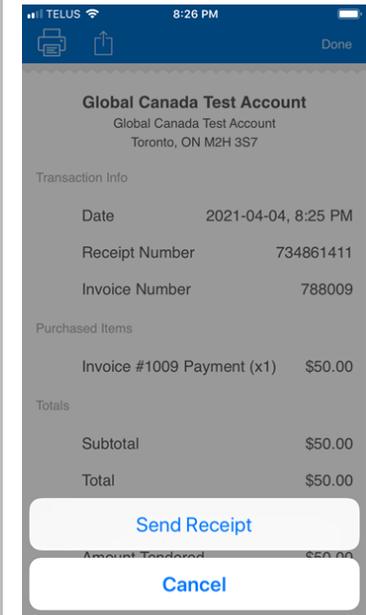


Step 3: Once the sale is processed, a receipt screen will show up.



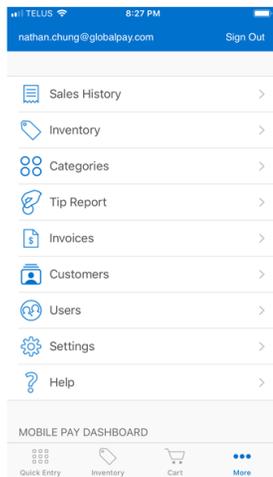
Step 4: You can send the receipt to the customer by selecting the box with the arrow icon.

By default, the **Send Receipt** screen will automatically send the receipt to the customer's email.

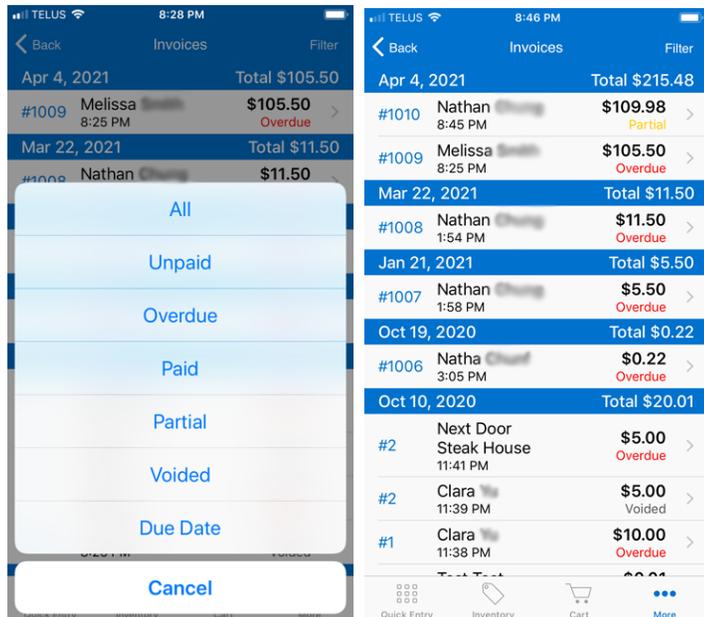


View existing invoices

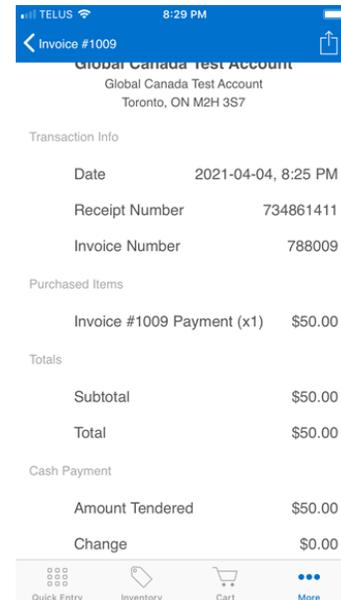
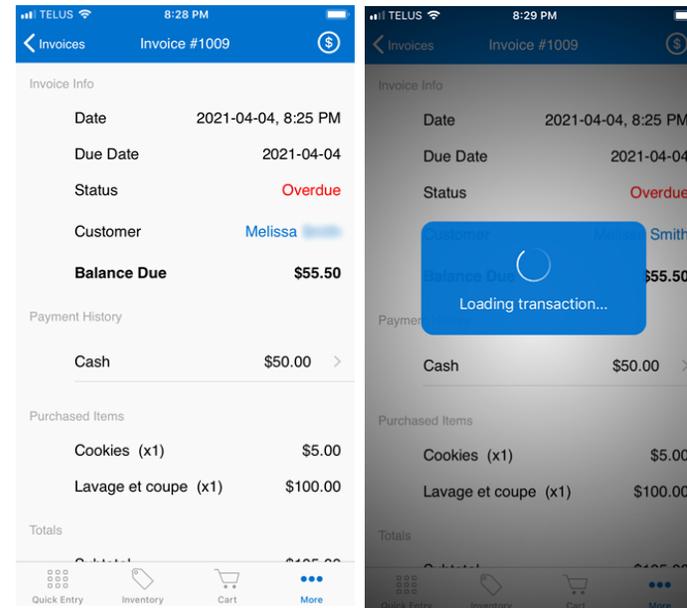
Step 1: Go to the menu screen and select **Invoices**.



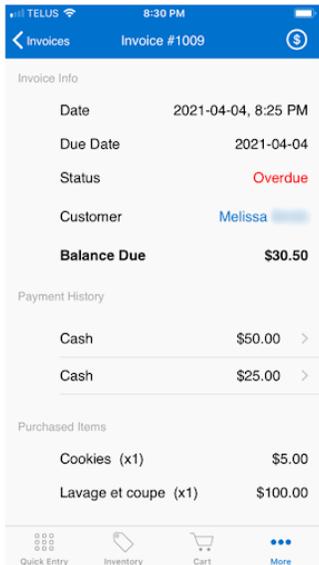
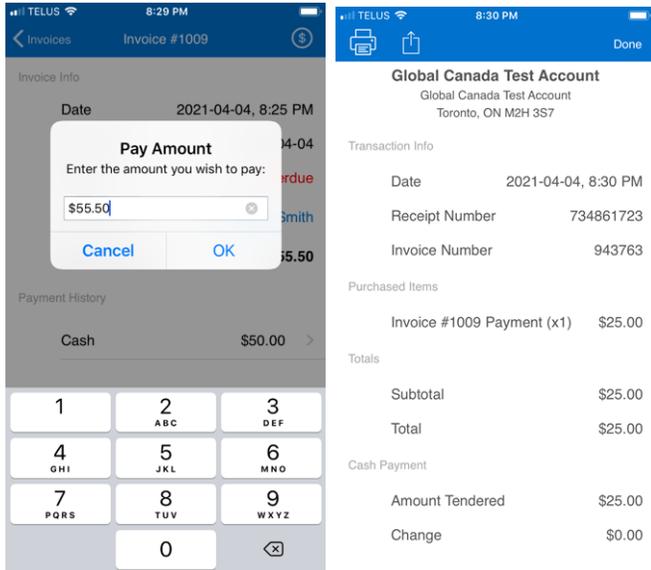
Step 2: Find the invoice you would like to complete. The filter option allows you to refine the list of invoices by payment status.



Step 3: Under **Payment history**, you can review any previous partial payments made against the invoice.

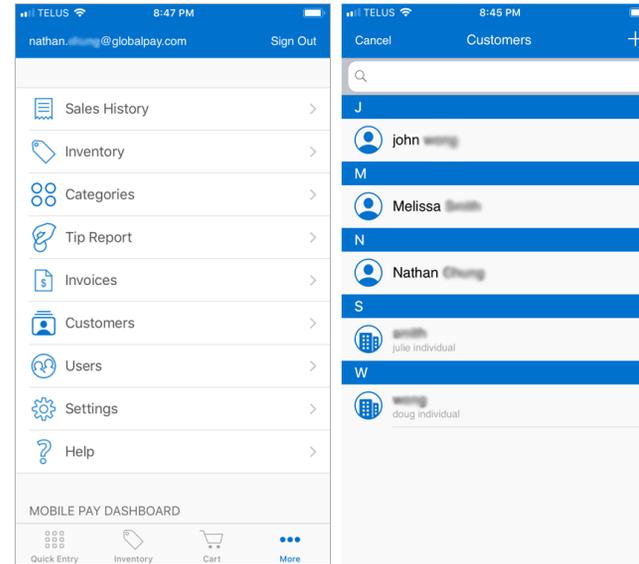


Step 4: If you would like to initiate partial payments against the invoice, select the **Coin button** in the upper right corner. You can confirm or alter the amount of the partial payment and select **OK** to trigger a card-present transaction.



Customer database

The **customer database** provides easy access to all of your customers. You can access the customer database by selecting **Customers** in the main menu. You can also access the customer database when an invoice is triggered.

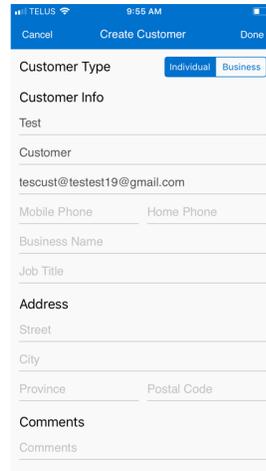


Adding customers

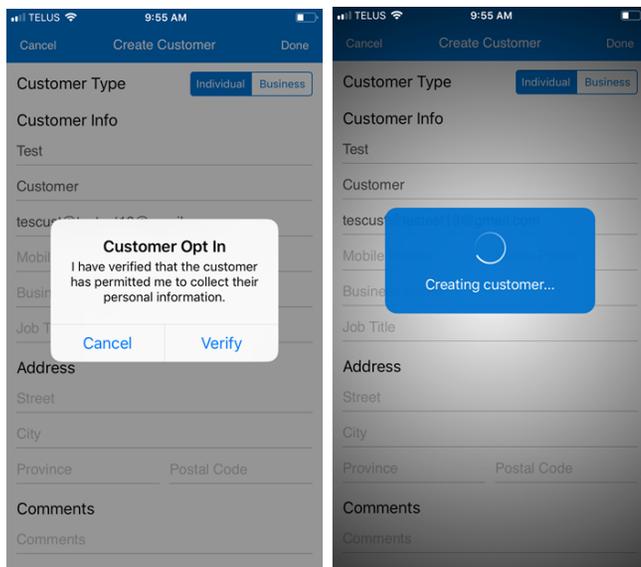
Customers can be added one by one through the app. If you wish to add a large batch of customers, please use the [add customers by bulk](#) function within the Mobile Pay back office.

Step 1: Navigate to the **Customers** screen from the main menu and tap the + button in the upper right corner.

Step 2: Enter the customer's information. An email address or mobile phone number is required. Once complete, tap **Done**.



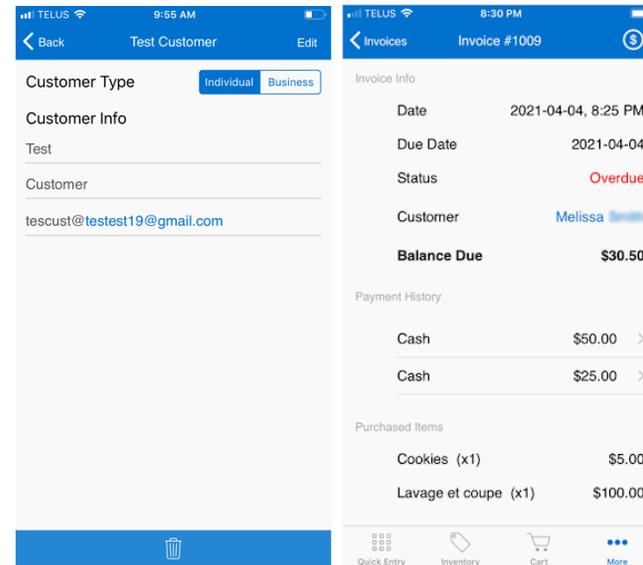
Step 3: Confirm you have consent from the customer to add the data. Once **Verify** is selected, the customer will be added to your customer database.



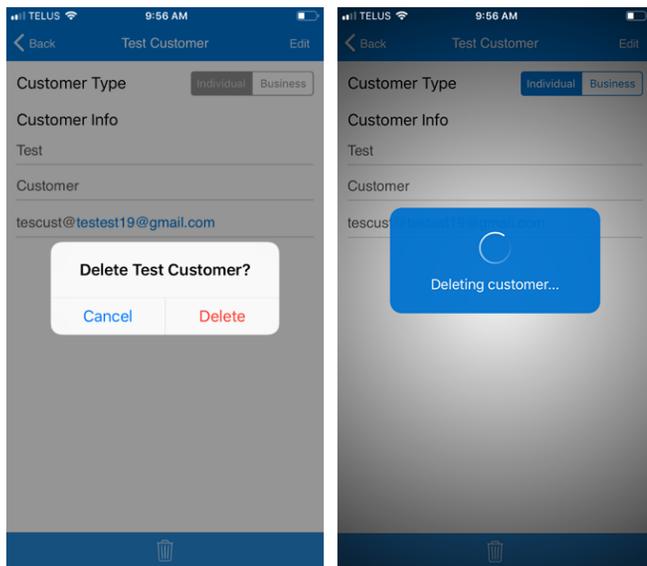
Edit / deleting customers

Step 1: Navigate to the **Customers** screen from the main menu and select the customer you would like to edit/delete.

Step 2: Select **Edit** (on the top right corner) or **Delete** (Trash icon) on the bottom of your screen.

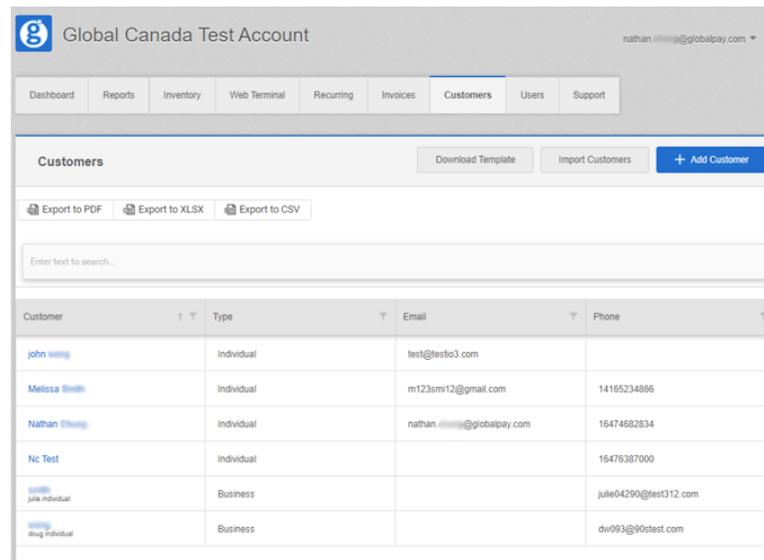


Step 3: If **Delete** is selected, you will be asked to confirm.



one customer record at once. Please see the [add customers by bulk section](#) for detailed instructions.

TIPS: Use the search function to search through your entire customer database. You may also click each column to help you better filter and sort the customer data.



Back Office

The **Mobile Pay Back Office** is a web portal that you can use to run your business. Access the Back Office through this link: <https://mobilepay.globalmpos.ca/>.

NOTE: The website displays in English or French based on your browser language settings. To change your desired language in the Back Office, first change your browser language and then refresh the Back Office URL.

Customer database

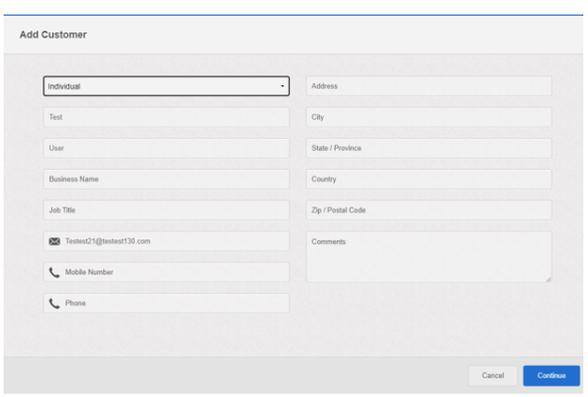
Access your customer database by selecting the **Customers** tab on the main page of the Back Office. Similar to the Mobile App, the Back Office allows you to add, edit and delete customer records. As an additional function that is unique to the Back Office, you may also create more than

Add customer (one by one)

Step 1: On the customer database page, select **+ Add Customer**



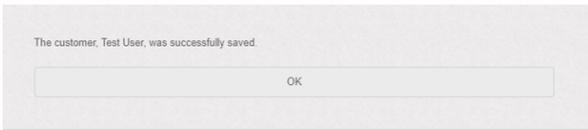
Step 2: Fill in the customer details, and select **Continue**



Step 3: Verify that you have the customer's consent, and select **Save**

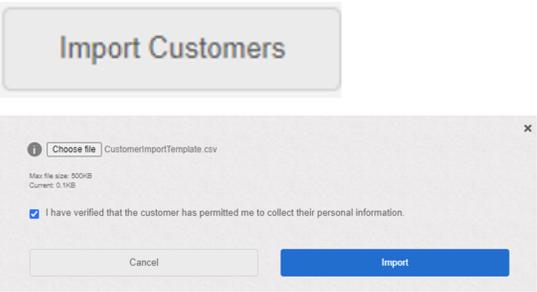


Step 4: Customer is added.



to be delivered to the customer.

Step 3: Save the CSV template file, select Import Customers on the customer database page, and follow the prompt to upload the saved CSV template file.

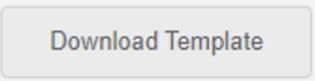


Step 4: The platform will provide the status of the upload.



Add customer by bulk

Step 1: On the customer database page, select **Download Template** to download the CSV template file.



Step 2: Open the CSV template file and populate the fields. Note that an email address or mobile phone number is required for the invoice

A	B	C	D	E	F
Last Name	First Name	Business Name	City	Mobile Number	Email
Test	User				Test1Test@gmail.com
Test 1	User				tetes30@gmail.com

Duplicate check during bulk upload

During bulk uploading of customer data, the Mobile Pay Back Office offers a simple duplicate check to help you spot and reject potential duplicated records.

The duplicate check will verify the data based on these five (5) fields: **First Name, Last Name, Business Name, Email, and Phone**

- If all 5 fields match, the system will not add the entry into the database.
- If all 5 fields do not match, the system will add the customer data as a new entry.

See examples below for how the duplicate check works:

Example 1

- **Existing data in your database:** John, Smith, john.smith@gmail.com
- **New bulk upload contains:** John, Smith, john.smith@gmail.com
- This entry will be flagged as a duplicate as only 3 fields exist and 3 fields match.

Example 2

- **Existing data in your database:** John, Smith, john.smith@gmail.com
- **New bulk upload contains:** John, Smith, john.smith@gmail.com, 123-123-1234 (mobile phone number)
- A new entry will be created in the database – Although three(3) columns matched because the new bulk upload data contains an additional field (phone number), this customer will be added as a new record.

Edit/delete customers

Step 1: On the customer database page, select the customer by clicking their name in the left column.

Step 2: The **Customer Detail** page will now be displayed. Select the **Edit** button to make changes.

Customer Detail: User Test

Customer Type	Address
Individual	N/A
First Name	City
User	N/A
Last Name	State / Province
Test	N/A
Business Name	Country
N/A	N/A
Job Title	Zip / Postal Code
N/A	N/A
Email	Comments
Test2Test@gltest.com	N/A
Mobile Number	
N/A	
Phone	
N/A	

Back Edit

Step 3: Once the edit is completed, select **Save**.

If you would like to delete this record, select **Delete** in the bottom left corner.

Edit Customer

Individual	Address
User	City
Test	State / Province
Business Name	Country
Job Title	Zip / Postal Code
✉ Test2Test@gltest.com	Comments
📞 Mobile Number	
📞 Phone	

Delete Cancel Save

Invoice management

Access your invoice management by selecting the **Invoices** tab on the main page of the Back Office. Similar to the Mobile App, the Back Office allows you to create, review, resend and delete customer invoices. As an additional function that is unique to the Back Office, you may also view and export reports for your transactions. Please see the [reports section](#) for details.

TIPS: Use the search function at the top to search through your invoices. You may also click each column to help you better filter and sort the invoice data.

Invoice Number	Amount	Status	Created	Due	Customer	Email	Phone
#2	\$5.00	Voided	10-10-2020 8:39 PM	10-10-2020	Clara	clara@globalpay.	14168589283
#2	\$5.00	Overdue	10-10-2020 8:41 PM	10-10-2020	Next Door Steak House	nextdoor@steakhou	14168474200
#1012	\$6.38	Pending	04-05-2021 9:27 AM	05-05-2021	Nc Test		16476387000
#1011	\$0.25	Partial	04-05-2021 8:19 AM	04-12-2021	Nathan	nathan.ing@glob	16474682834
#1010	\$109.98	Partial	04-04-2021 5:45 PM	04-11-2021	Nathan	nathan.ing@glob	16474682834
#1009	\$105.50	Overdue	04-04-2021 5:25 PM	04-04-2021	Melissa	mt23smi12@gmail.	14165234896

Creating an invoice

NOTE: When creating an invoice, the Back Office version serves as a simple tool for you to quickly create an invoice by entering the sale amount. However, for example, it does not have the ability to add items from a catalogue. Please use the Mobile Pay App to enjoy the full experiences of Mobile Pay Online Invoicing.

Step 1: Select **+ Create invoices** on the invoice page. Enter the amount and item details.

Global Canada Test Account

Dashboard Reports Inventory Web Terminal Recurring **Invoices** Customers Users Support

Create Invoice

Sale

Sale Amount \$ 0.00

Quick Item Name

Sale Description

Invoice

Customer Customer Not Selected [Select Customer](#)

Due Date 2021-04-05

Comments (optional)

Terms and Conditions Thank you for your business. Please send payment by the invoice due date.

Send

Step 2: Click **Select Customer** to choose a customer from your customer database. You may enter and select the filter to help you better locate the customer entry.

Select Customer

Customer

john smith
Melissa Smith
Nathan Inging
No Text
John Individual
John Individual

Enter text to filter

(All)
(Blank)
(Non blank)

John Smith

Back + Add Customer

Step 3: Choose and select a form of preferred communication method.

Send Email
Send SMS
Cancel

Step 4: The system confirms the invoice has been sent.

Invoice #1013 was sent to Nathan Inging

OK

Reviewing / resending / deleting an invoice

Step 1: Under the **Invoices** tab, select the invoice by clicking the invoice number in blue.

Invoice Number	Amount	Status	Created
#2	\$5.00	Voided	10-10-2020 8:39 PM
#2	\$5.00	Overdue	10-10-2020 8:41 PM
#1013	\$20.00	Pending	04-05-2021 11:27 AM
#1012	\$6.38	Pending	04-05-2021 9:27 AM

Step 2: You can view invoice details, including the status of the payment, partial payment, and invoice purposes. Select **Back** to return to the invoice screen, or select **Resend** to resend the invoice to the customer.

invoice #1011

Invoice Info
 Date: 2021-04-12 12:00:00 AM
 Status: **Final**
 Customer: Nathan
 Balance/Due: \$0.23

Payment History
 Cash: \$0.01
 Cash: \$0.01

Purchased Items
 Quick Item (1x): \$0.22

Totals
 Subtotal: \$0.22
 Tax: \$0.03
 GST (5.95%):
 GST (9.98%):
 Tip/Amount: \$0.00
 Total: \$0.25

Comments
 This is a test

Terms and Conditions
 Thank you for your business. Please send payment by the invoice due date.

Back Resend

If you wish to delete an invoice, select the **Void** option. Note that you can only delete an invoice if it has not been paid in part or in full.

Invoice #1012

Invoice Info
 Date: 2021-05-05 12:00:00 AM
 Status: **Pending**
 Customer: No. Test
 Balance/Due: \$6.38

Purchased Items
 Quick Item (1x): \$5.55

Totals
 Subtotal: \$5.55
 Tax: \$0.83
 GST (5.95%):
 GST (9.98%):
 Tip/Amount: \$0.00
 Total: \$6.38

Comments
 (none)

Terms and Conditions
 Thank you for your business. Please send payment by the invoice due date.

Back Void Resend

Reports

- **Invoice ID** is a new identifier and is a common data point between the three (3) main reports.
- **Receipt numbers** are only common between the **Transaction** and **Inventory** reports.

Transaction report

Back Office interface:

Global Canada Test Account

Dashboard Reports Inventory Web Terminal Recurring Invoices Customers Users Support

Sale Statistics **Transactions** Sales Tax Inventory Tips

Tip: All of your transactions via cash and card will be documented here. The balance from your card payments will be settled to your account daily.

Total Sales: \$125.02
 Next Batch Settlement: \$0.00

Search Type: 2021-04-01 to 2021-04-05

Amount	Type	Date	Receipt Number	User	Source	Description
\$0.01	Cash	21-04-05	734891723	nathan.illing	Mobile	
\$0.01	Cash	21-04-05	734892871	nathan.illing	Mobile	
\$50.00	Cash	21-04-04	734892809	nathan.illing	Mobile	
\$25.00	Cash	21-04-04	734891723	nathan.illing	Mobile	
\$50.00	Cash	21-04-04	734891411	nathan.illing	Mobile	

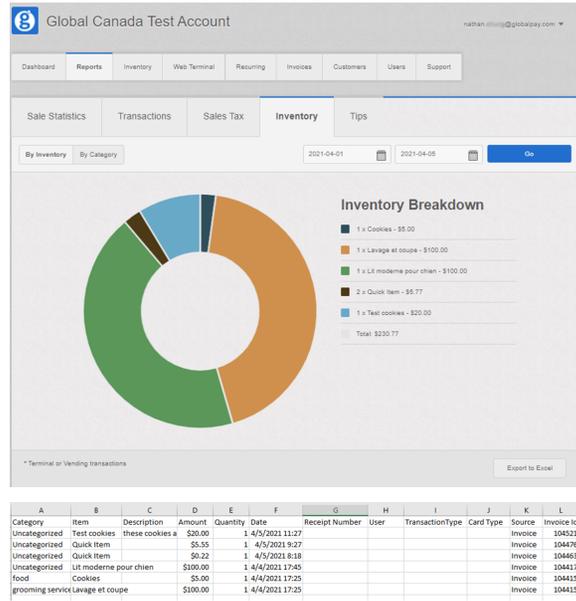
N/A* - Usernames are not applicable to terminal transactions

Export to Excel

Exported file:

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
Source	User	Amount	Tax	Tip	Total	Date	Transaction Type	Card Type	Last Four	Batch Num	Receipt Num	Invoice Number	Batch opened	Batch clos	Description	Opt Invoice ID
Mobile	nathan.ch	0.01	0	0	0.01	4/12/2021 8:39	Vente au comptant	Cash	18	734891723	89562	4/12/2021 8:39	#####			104843
Mobile	nathan.ch	0.01	0	0	0.01	4/12/2021 8:41	Vente au comptant	Cash	18	734892871	202787	4/12/2021 8:41	#####			104843
Mobile	nathan.ch	50	0	0	50	4/4/2021 17:30	Vente au comptant	Cash	17	734892809	245284	4/4/2021 17:30	#####			104817
Mobile	nathan.ch	25	0	0	25	4/4/2021 17:30	Vente au comptant	Cash	17	734891723	941763	4/4/2021 17:30	#####			104815
Mobile	nathan.ch	50	0	0	50	4/4/2021 17:25	Vente au comptant	Cash	17	734891411	788559	4/4/2021 17:25	#####			104815

Inventory report



Invoice report

Invoice Number	Amount	Status	Created	Due	Customer	Email	Phone
#2	\$5.00	Voided	10-10-2020 8:35 PM	10-10-2020	Clara %	clara.j@globalpay.com	1416858203
#2	\$5.00	Overdue	10-10-2020 8:41 PM	10-10-2020	Next Door Steak House	nextdoor@1416847	14168474200
#1013	\$20.00	Pending	04-05-2021 10:27 AM	04-17-2021	Nathan Chung	nathan.chung@globalpay.com	16474668234
#1012	\$6.38	Pending	04-05-2021 10:27 AM	05-05-2021	No Test		16478387000
#1011	\$0.25	Partial	04-05-2021 8:18 AM	04-12-2021	Nathan Chung	nathan.chung@globalpay.com	16474668234
#1010	\$109.98	Partial	04-04-2021 8:48 PM	04-11-2021	Nathan Chung	nathan.chung@globalpay.com	16474668234

Customer-facing content

The following are the sample contents that your customer receives during the invoicing process.

Email invoice

This is a sample bilingual invoice that a customer would receive via email.

Request for payment
Global Canada Test Account has issued a digital invoice requesting your payment for services.

Pay Invoice now

Demande de paiement
Global Canada Test Account a emis une facture numerique demandant votre paiement pour des services.

Payer la facture maintenant

Email invoice that has been partially paid

This is a sample invoice detail screen that a customer sees when they click on the invoice link delivered to them via email or SMS.

INVOICE - Global Canada Test Account

Invoice Number #1010
Invoice Date: 21-04-21
Due Date: 29-04-21

Global Canada Test Account
Global Canada Test Account
Global Canada Test Account, AZ 85033

Bill To: Nathan Chung, nathan.chung@globalpay.com

BALANCE \$59.98 PAY NOW

Summary

ITEM	QUANTITY	PRICE	AMOUNT
Lt moderne pour chien	1	\$100.00	\$100.00
Subtotal			\$100.00
Tax			\$9.98
Total			\$109.98

Comments: Terms & Conditions
Thank you for your business. Please send payment by the invoice due date.

Payment Info: Card, MM / YY, CVV, Postal, PAY 59.98

Note that in this sample, the customer has partially paid and therefore the remaining balance is less than the partial payments.

Sample bilingual receipt

These are the sample receipts a customer will receive after the completion of payments.

noreply@mobilepay.globalmpos.ca | sprivallc.onmicrosoft.com
to me

globalpayments

4/4/2021 8:25 PM (EDT)
Global Canada Test Account
Global Canada Test Account
Toronto, ON M2H 3S7
1

Réponse
Success

Transaction Type Cash Sale
Terminal ID **435
Stan 298
AuthID
Invoice Number 788009
CONTACT

1 x Invoice #1009 Payment @ \$50.00 \$50.00

Subtotal \$50.00
Tax \$0.00
Tip \$0.00
Total CAD \$50.00

I AGREE TO PAY ABOVE TOTAL AMOUNT ACCORDING TO CARD ISSUER AGREEMENT (MERCHANT AGREEMENT IF CREDIT VOUCHER)

Thank You For Your Business
www.globalcanada.ca

Cardholder Copy
Retain this copy for statement verification

globalpayments

4/4/2021 8:25 PM (EDT)
Global Canada Test Account
Global Canada Test Account
Toronto, ON M2H 3S7
1

Réponse
Success

Type de transaction Vente au comptant
Code de terminal **435
Identifiant du marchand
Stan 298
Code autor
Numéro de facture 788009
CONTACT

1 x Invoice #1009 Payment @ 50,00 \$ 50,00 \$

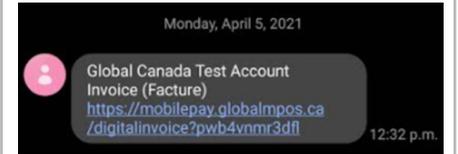
Sous-total 50,00 \$
Taxe 0,00 \$
Pourboire 0,00 \$
Total CAD 50,00 \$

J'ACCEPTE DE PAYER LE MONTANT TOTAL CI-DESSUS EN VERTU DE L'ACCEPTÉ DE L'ÉMETTEUR DE CARTES (ENTENTE DU MARCHAND, SI NOTE DE CRÉDIT)

Merci pour votre entreprise
Thank You For Your Business
www.globalcanada.ca
[Politica de privacidad](#)

Copie du titulaire de carte
Conservez cette copie pour la vérification du relevé

Sample SMS invoice (bilingual)



Sample SMS receipt (bilingual)

The website in the SMS receipt will detect browser language and display it in either English or French.

