

User Guide

Mobile Pay Online

Invoicing

Simple online invoicing to get paid fast.

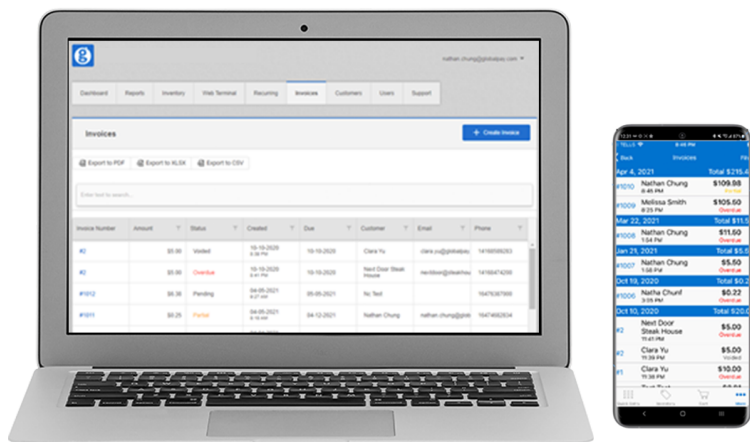


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Mobile app

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](#)".

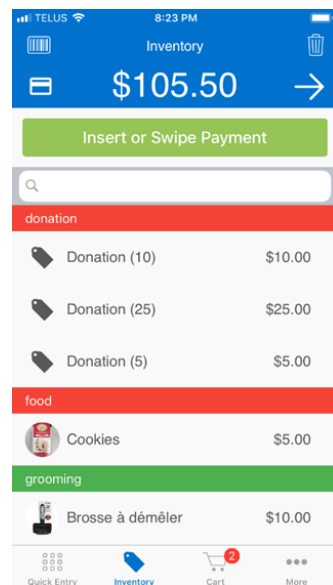
NOTE: The app language will automatically be in English or French based on your device's language setting. To change the app language, first, change your device's language and relaunch the Mobile Pay app.

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.

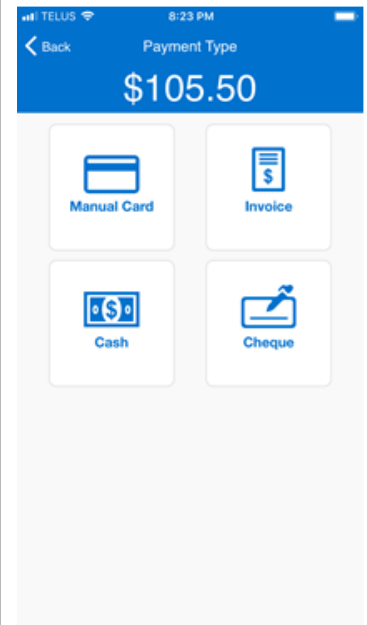
Invoice management

Creating an invoice in-app

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

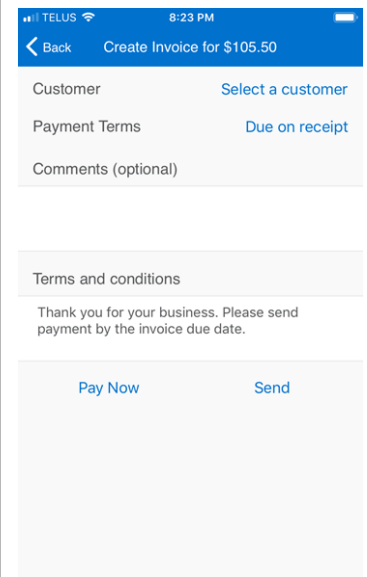


Step 2: Select Invoice



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

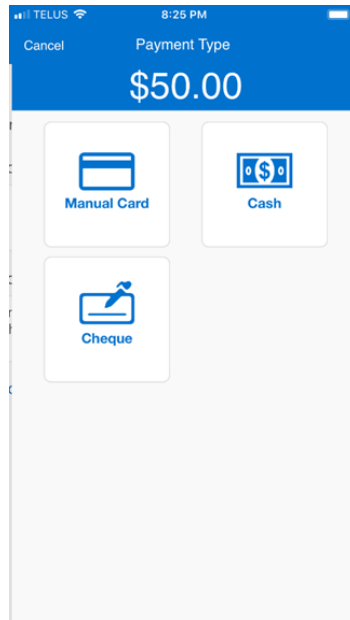
Step 1: When the **Pay Now** option is selected on the invoice screen, confirm the amount the customer would like to pay and select **OK**.

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.

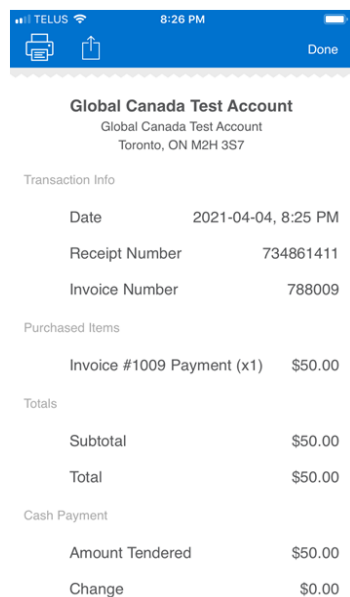
Step 2: The app will now prompt for the method of payment. The Payment options presented vary based on your Mobile Pay solution setup.

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.

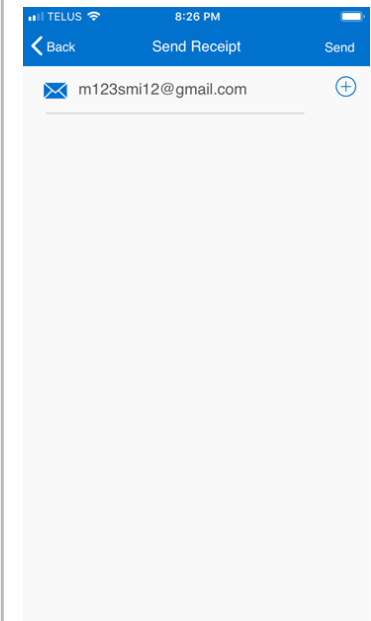
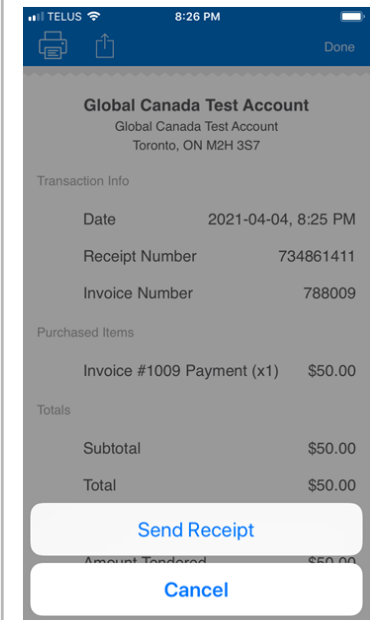


Step 3: Once the sale is processed, a receipt screen will show up.



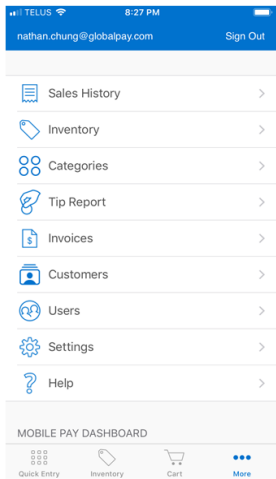
Step 4: You can send the receipt to the customer by selecting the box with the arrow icon.

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

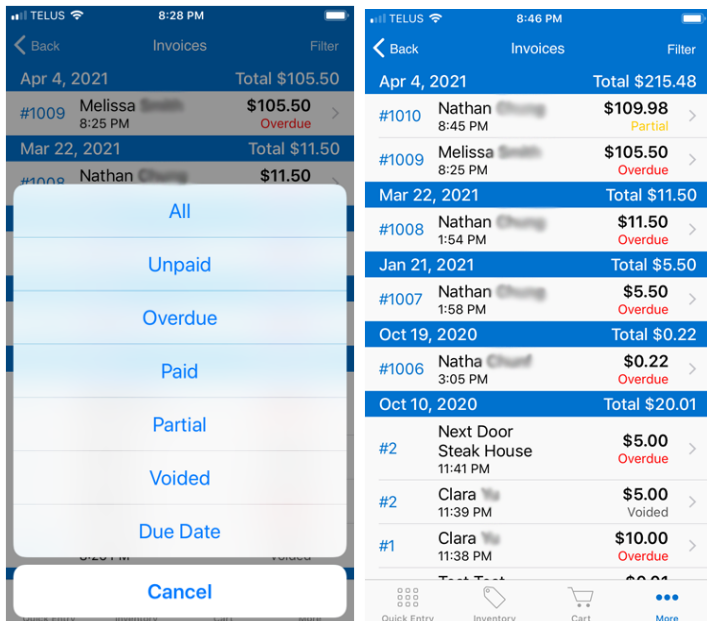


View existing invoices

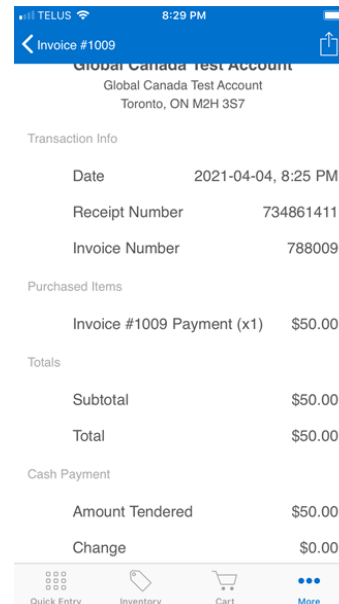
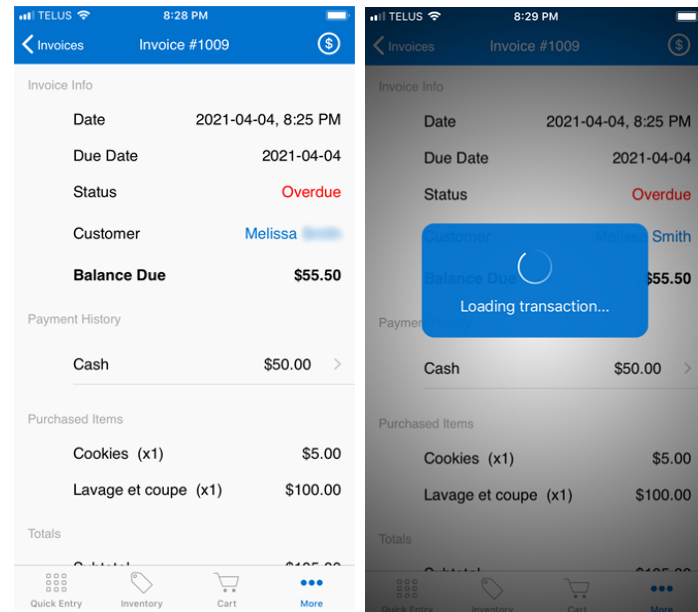
Step 1: Go to the menu screen and select **Invoices**.



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.

Pay Amount
Enter the amount you wish to pay:

\$55.50

Cancel OK

Global Canada Test Account
Global Canada Test Account
Toronto, ON M2H 3S7

Transaction Info

Date 2021-04-04, 8:25 PM

Receipt Number 734861723

Invoice Number 943763

Purchased Items

Invoice #1009 Payment (x1) \$25.00

Totals

Subtotal \$25.00

Total \$25.00

Cash Payment

Amount Tendered \$25.00

Change \$0.00

Invoice #1009

Invoice Info

Date 2021-04-04, 8:25 PM

Due Date 2021-04-04

Status **Overdue**

Customer **Melissa**

Balance Due \$30.50

Payment History

Cash \$50.00

Cash \$25.00

Purchased Items

Cookies (x1) \$5.00

Lavage et coupe (x1) \$100.00

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.

main menu

Sign Out

Sales History

Inventory

Categories

Tip Report

Invoices

Customers

Users

Settings

Help

MOBILE PAY DASHBOARD

Quick Entry Inventory Cart More

Customers

Search

J

john

M

Melissa

N

Nathan

S

julie individual

W

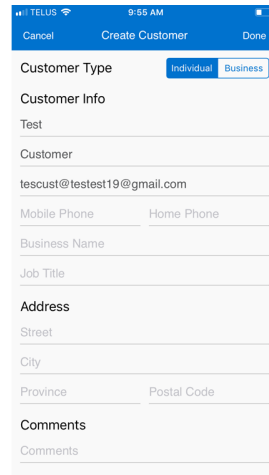
doug individual

Adding customers

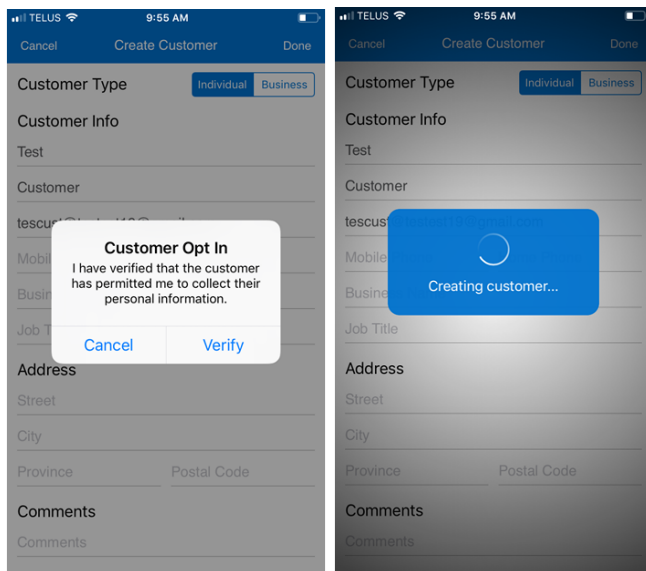
Customers can be added one by one through the app. If you wish to add a large batch of customers, please use the [add customers by bulk](#) function within the Mobile Pay back office.

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**.



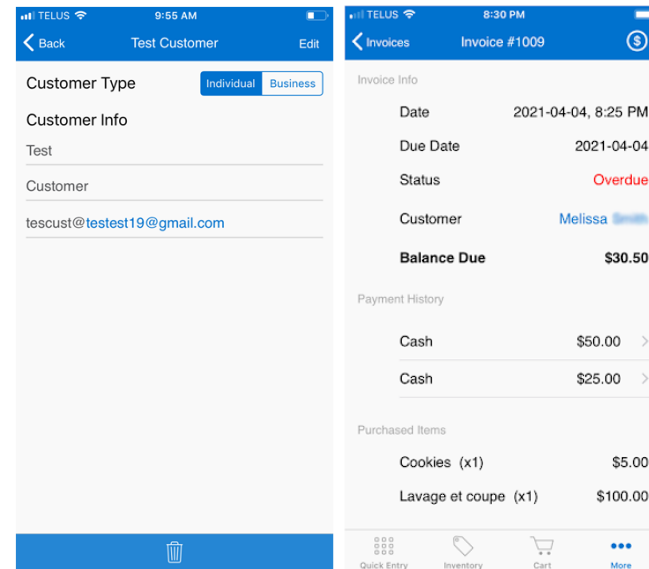
Step 3: Confirm you have consent from the customer to add the data. Once **Verify** is selected, the customer will be added to your customer database.



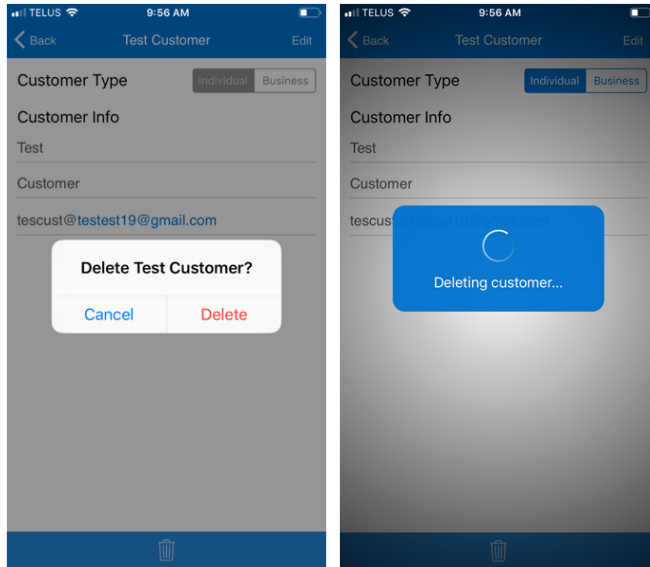
Edit / deleting customers

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.

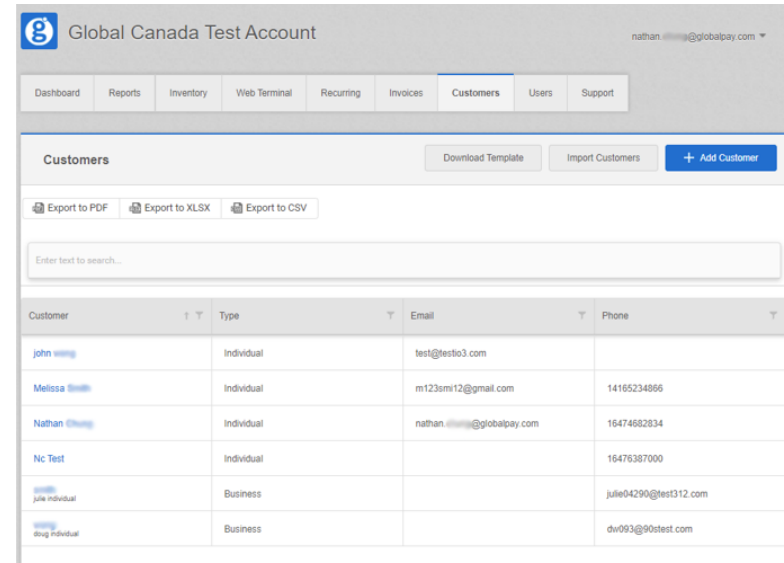


Step 3: If **Delete** is selected, you will be asked to confirm.



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**

+ 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.

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@gl
Test 1	User				tetes30@gl3i3

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.

Last Name	First Name	Business Name	City	Mobile Number	Email
2	Test	User			Test1Test@gl

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

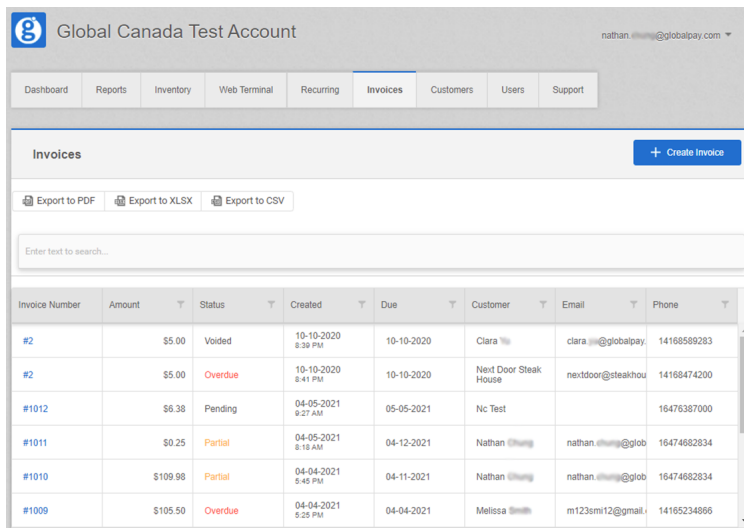
Individual	Address
User	City
Test	State / Province
Business Name	Country
Job Title	Zip / Postal Code
✉ Test2Test@gltest.com	Comments
📞 Mobile Number	
📞 Phone	

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.

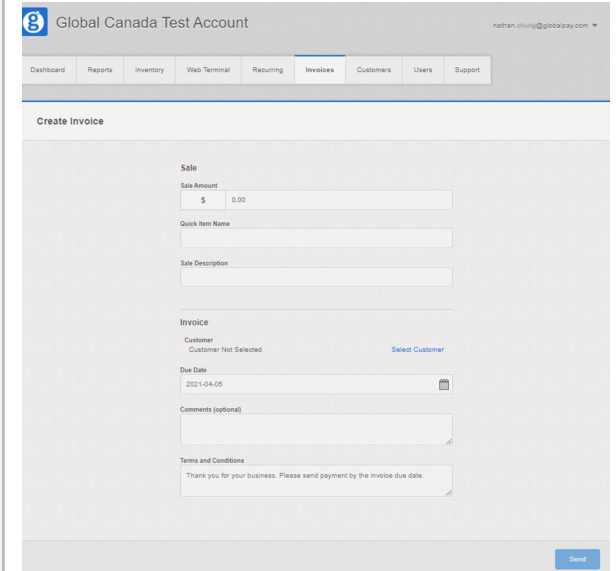


Invoice Number	Amount	Status	Created	Due	Customer	Email	Phone
#2	\$5.00	Voided	10-10-2020 8:39 PM	10-10-2020	Clara	clara@globalpay.	14168589283
#2	\$5.00	Overdue	10-10-2020 8:41 PM	10-10-2020	Next Door Steak House	nextdoor@steakhou	14168474200
#1012	\$6.38	Pending	04-05-2021 9:27 AM	05-05-2021	Nc Test		16476387000
#1011	\$0.25	Partial	04-05-2021 8:19 AM	04-12-2021	Nathan Chung	nathan.chung@glob	16474862834
#1010	\$109.98	Partial	04-04-2021 5:45 PM	04-11-2021	Nathan Chung	nathan.chung@glob	16474862834
#1009	\$105.50	Overdue	04-04-2021 5:25 PM	04-04-2021	Melissa Smith	m123smi12@gmail.	14165234896

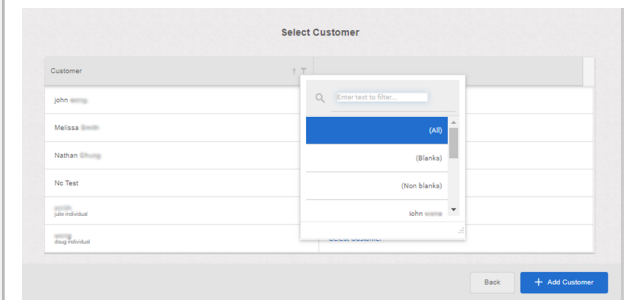
Creating an invoice

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.

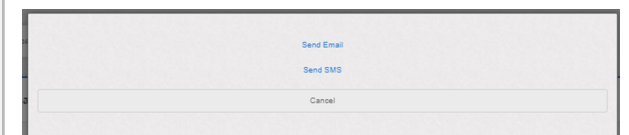
Step 1: Select **+ Create invoices** on the invoice page. Enter the amount and item details.



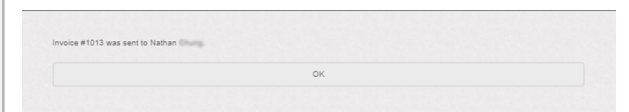
Step 2: Click **Select Customer** to choose a customer from your customer database. You may enter and select the filter to help you better locate the customer entry.



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



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



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.

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 #1011

Invoice Info
 Date: 2021-04-12 12:00:00 AM
 Status: Voided
 Customer: Nathan
 Balance/Due: \$0.22

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

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 nathan.ill@globalpay.com

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
 Your total transaction amount for this month: **\$125.02**

Next Batch Settlement
 Total sales that will be included in the next batch settlement (includes tax and tip): **\$0.00**

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

Amount	Type	Date	Receipt Number	User	Source	Description
\$0.01	Cash	21-04-05	73461723	nathan.ill@	Mobile	
\$0.01	Cash	21-04-05	734620371	nathan.ill@	Mobile	
\$50.00	Cash	21-04-04	73460309	nathan.ill@	Mobile	
\$25.00	Cash	21-04-04	73461723	nathan.ill@	Mobile	
\$50.00	Cash	21-04-04	73461411	nathan.ill@	Mobile	

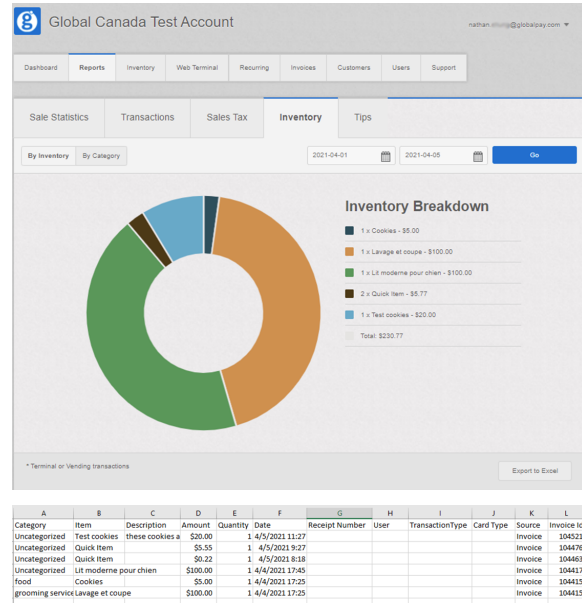
N/A* - Usernames are not applicable to terminal transactions

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	Receipt Num	Invoice Number	Batch opened	Batch close	Description	Optm Invoice ID
Mobile	nathan.ill@	0.01	0	0	0.01	4/20/2021 8:39	Vente au comptant	Cash		18	73461723	000000	4/20/2021 8:39	000000		00465
Mobile	nathan.ill@	0.01	0	0	0.01	4/20/2021 8:39	Vente au comptant	Cash		18	734620371	000000	4/20/2021 8:39	000000		00466
Mobile	nathan.ill@	50	0	0	50	4/19/2021 17:00	Vente au comptant	Cash		17	73460309	000000	4/19/2021 17:00	000000		00467
Mobile	nathan.ill@	25	0	0	25	4/19/2021 17:00	Vente au comptant	Cash		17	73461723	000000	4/19/2021 17:00	000000		00468
Mobile	nathan.ill@	50	0	0	50	4/19/2021 17:00	Vente au comptant	Cash		17	73461411	000000	4/19/2021 17:00	000000		00469

Inventory report



Invoice report

Global Canada Test Account

Dashboard Reports Inventory Web Terminal Recurring Invoices Customers Users Support

Invoices + Create Invoice

Export to PDF Export to XLSX Export to CSV

Enter text to search.

Invoice Number	Amount	T	Status	T	Created	T	Due	T	Customer	T	Email	T	Phone	T
#2	\$5.00		Voided		10-10-2020 8:35 PM		10-10-2020		Clara %		clara.j@globalpay.ca		1416858283	
#2	\$5.00		Overdue		10-10-2020 8:41 PM		10-10-2020		Next Door Steak House		nextdoor@globalpay.ca		14168474200	
#1013	\$20.00		Pending		04-05-2021 10:27 AM		04-17-2021		Nathan Chung		nathan.chung@globalpay.ca		10474682334	
#1012	\$6.38		Pending		04-05-2021 10:27 AM		05-05-2021		No Test				10476387000	
#1011	\$0.25		Partial		04-05-2021 8:18 AM		04-12-2021		Nathan Chung		nathan.chung@globalpay.ca		10474682334	
#1010	\$109.98		Partial		04-04-2021 8:45 PM		04-11-2021		Nathan Chung		nathan.chung@globalpay.ca		10474682334	

A	B	C	D	E	F	G	H	I	J
Invoice Number	Amount	Status	Created	Due	Customer	Email	Phone	Invoice Id	Balance Due
2	5	Voided	2020-10-10	2020-10-10	Clara %	clara.j@1416858		74253	5
1013	20	Pending	2020-10-10	2020-10-10	Next Door Steak House	nextdoor@1416847		74254	5
1012	6.38	Pending	2021-04-05	2021-04-17	Nathan Chung	nathan.ch@1047468		104522	20
1011	0.25	Partial	2021-04-05	2021-04-12	Nathan Chung	nathan.ch@1047468		104463	0.23
1010	109.98	Partial	2021-04-04	2021-04-11	Nathan Chung	nathan.ch@1047468		104417	59.98
1009	105.5	Overdue	2021-04-04	2021-04-04	Wellness	ml23m@1416524		104415	80.5
1008	11.5	Overdue	2021-03-22	2021-03-29	Nathan Chung	nathan.ch@1047468		102139	11.5
1007	5.5	Overdue	2021-01-21	2021-01-21	Nathan Chung	nathan.ch@1047468		89891	5.5
1006	0.22	Overdue	2020-10-19	2020-10-19	Nathan Chung	nathan.ch@73333		73333	0.22
1005	0.01	Voided	2020-10-10	2020-10-10	Test Test	chrome@1416858		74245	0.01
1004	70	Overdue	2020-06-10	2020-06-17	Nathan Chung	nathan.ch@56973		56973	70
1003	0.25	Overdue	2020-06-10	2020-06-17	Nathan Chung	nathan.ch@56972		56972	0.25
1002	45	Overdue	2020-05-12	2020-05-12	Nathan Chung	nathan.ch@50897		50897	45
1001	75.58	Overdue	2020-05-12	2020-06-12	Flora %	flora.l@1416858		50896	75.58
1	10	Overdue	2020-10-10	2020-10-10	Clara %	clara.j@1416858		74252	10

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.

nathan.chung@globalpay.ca @hotmail.com 8:45 PM (29 minutes ago) ☆ ↗

Request for payment

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

Please follow this link to submit payment:

[Pay Invoice now](#)

Demande de paiement

Global Canada Test Account a émis une facture numérique demandant votre paiement pour des services.

Veuillez suivre ce lien pour soumettre le paiement:

[Payez la facture maintenant](#)

Reply Forward

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.

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

INVOICE - Global Canada Test Account

Invoice Number #1010

Global Canada Test Account
Global Canada Test Account
Global Canada Test Account, AZ 85203

Invoice Date: 21-04-21
Due Date: 21-04-21

Bill To
Nathan Chung
nathan.chung@globalpay.com

BALANCE
\$59.98
[PAY NOW](#)

Summary

ITEM	QUANTITY	PRICE	AMOUNT
Lit 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](#)

Sample bilingual receipt

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

noreply@mobilepay.globalmpos.ca  sprivalic.omicronsoft.com
to me

globalpayments

4/4/2021 8:25 PM (EDT)

Global Canada Test Account
Global Canada Test Account
Toronto, ON M2H 3S7
1

Response
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
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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'ENTENTE DE CÉDEMENT 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.

Monday, April 5, 2021



Global Canada Test Account
Invoice (Facture)
<https://mobilepay.globalmpos.ca/digitalinvoice?pw4vnmr3df>

12:32 p.m.



Global Canada Test Account
Receipt (Reçu): <https://mobilepay.globalmpos.ca/receipt?hash=qbh5oucpl1d>

1