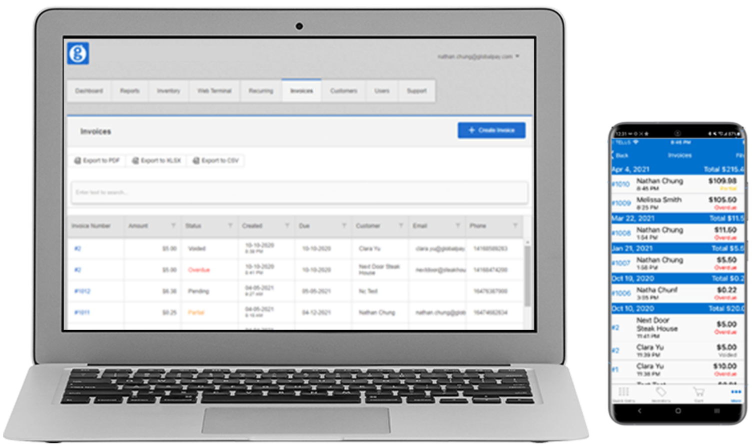
Payments

User Guide

Mobile Pay Online Invoicing

Simple online invoicing to get paid fast.



globalpayments | Desjardins

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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**".

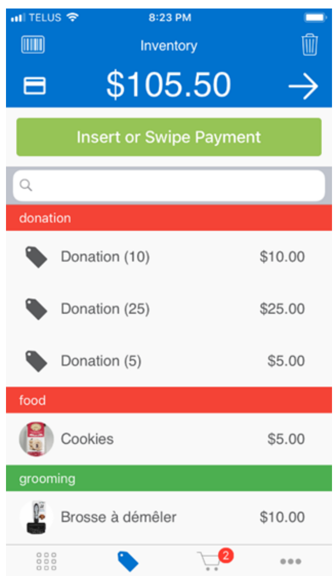
NOTE: The app language will automatically be in English or French based on your device's language setting. To change the app language, first, change your device's language and relaunch the Mobile Pay app.

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.

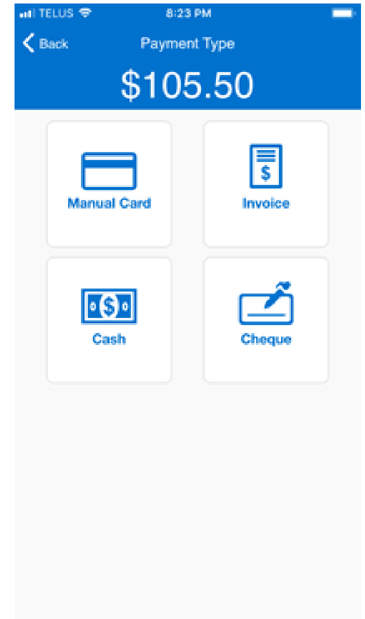
Invoice management

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:

a. **Select a customer** allows you to select an existing customer or create a new customer.

b. **Payment Terms** allow you to define when the invoice is due.

   i. Due on receipt

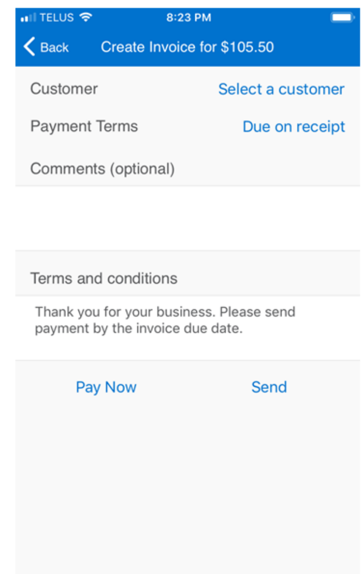
   ii. 1 week

   iii. 2 weeks

   iv. 1-month

   v. Custom – choose a date

   vi. Cancel



c. **Comments** is an optional field for you to add comments

d. **Terms and conditions** are editable

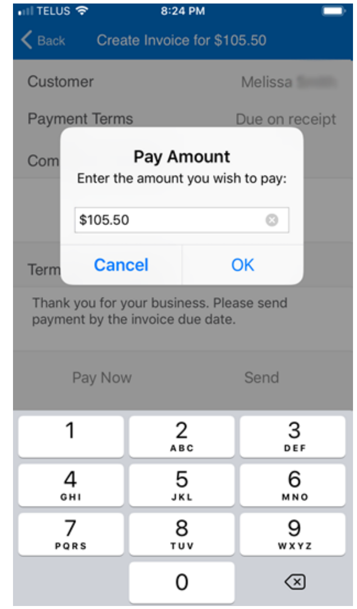
e. **Pay now** triggers screens to accept Partial card present payments presented on the invoice. And it will also send the invoice to the selected customer. Please see the Partial card-present payments section for detailed instructions.

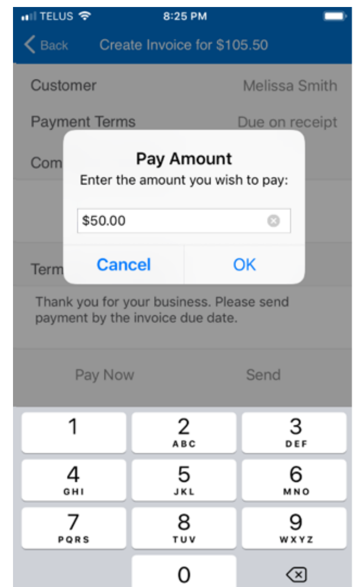
f. **Send** option sends the invoice to the customer. When the customer's email and SMS contacts are both on file, the default option is to send out the invoice by email.

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.

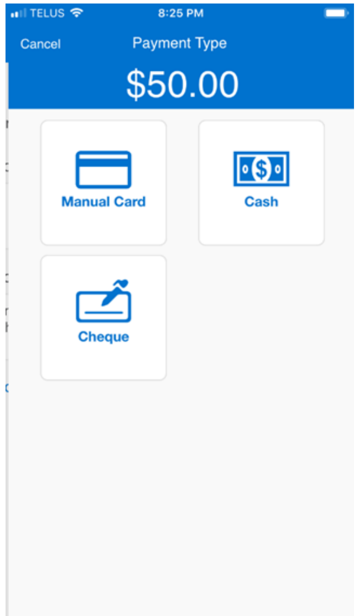




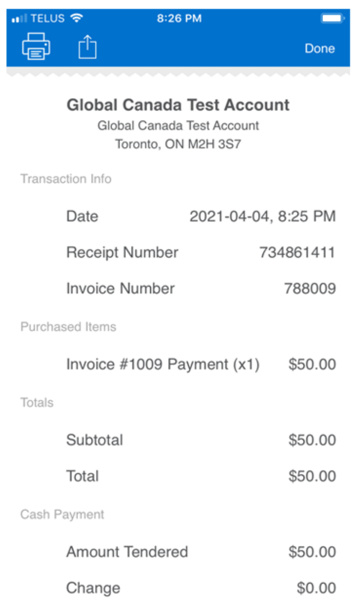
Step 2: The app will now prompt for the method of payment. The Payment options presented vary based on your Mobile Pay solution setup.

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.

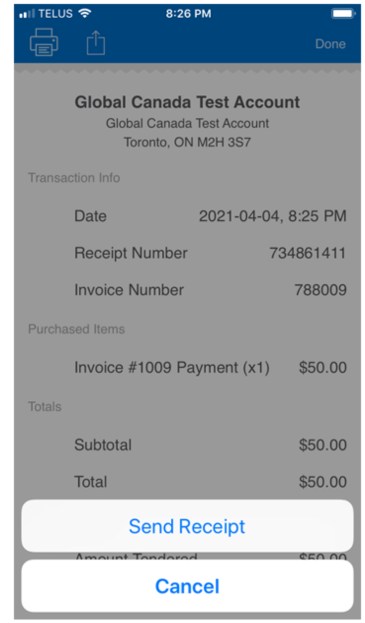


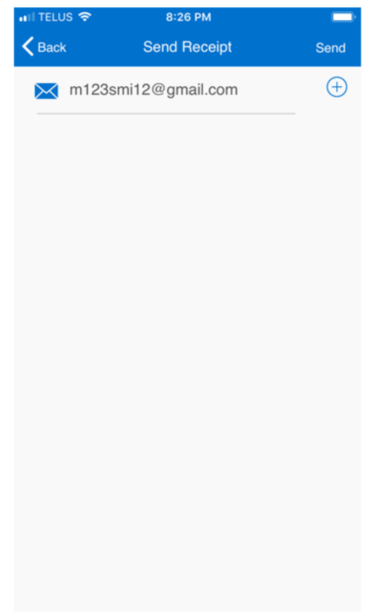
Step 3: Once the sale is processed, a receipt screen will show up.



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

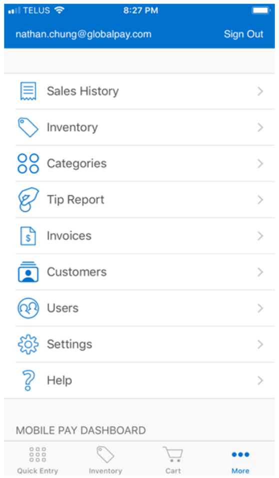
By default, the **Send Receipt** screen will automatically send the receipt to the customer's email.



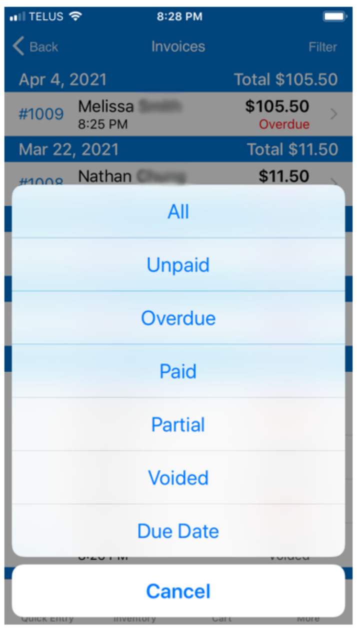


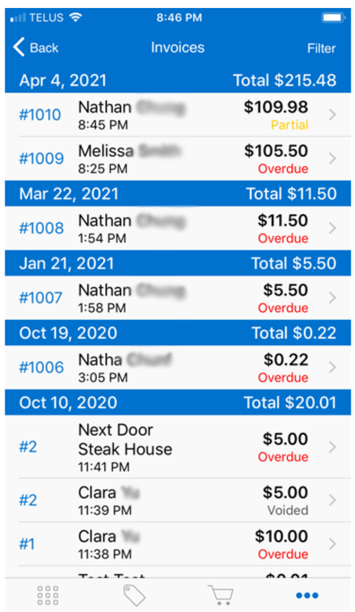
View existing invoices

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

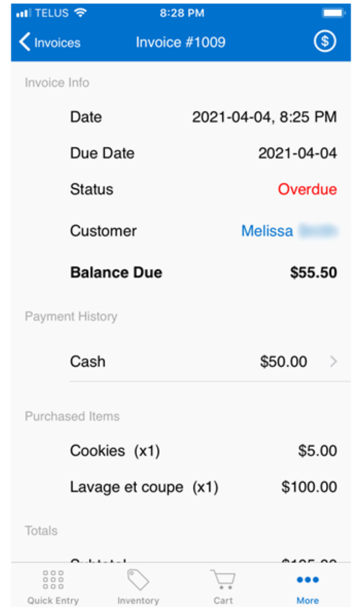


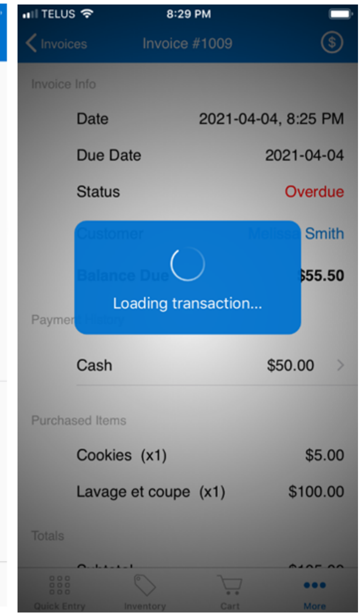
Step 2: Find the invoice you would like to complete. The filter option allows you to refine the list of invoices by payment status.

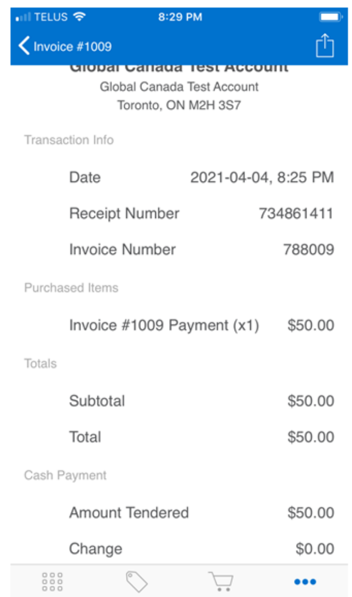




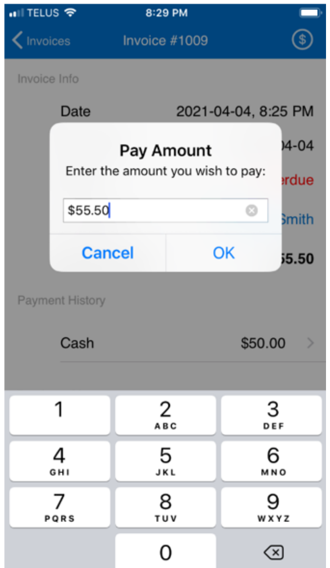
Step 3: Under **Payment history**, you can review any previous partial payments made against the invoice.

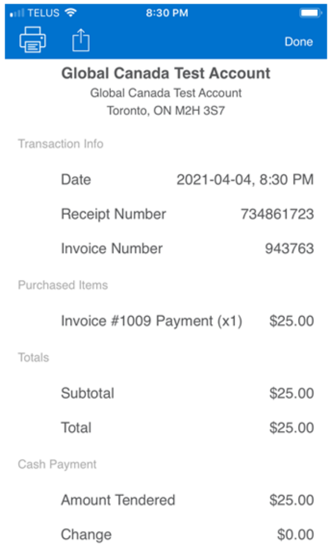


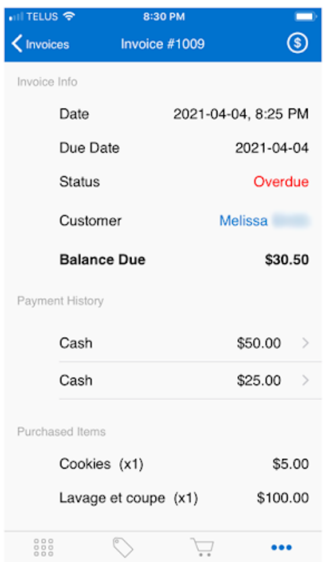




Step 4: If you would like to initiate partial payments against the invoice, select the **Coin button** in the upper right corner. You can confirm or alter the amount of the partial payment and select **OK** to trigger a card-present transaction.

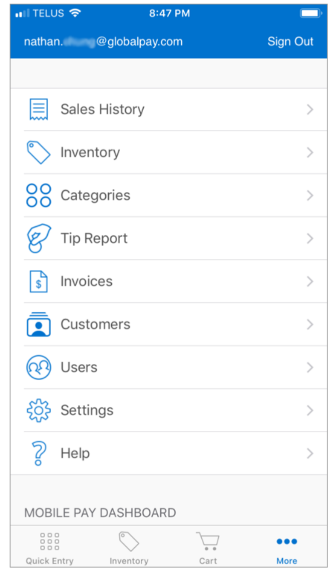


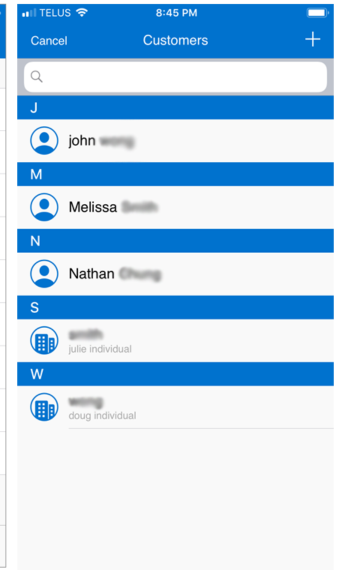




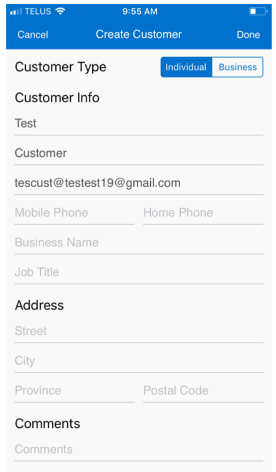
Customer database

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

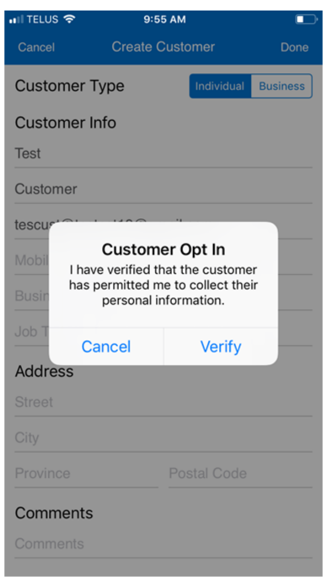


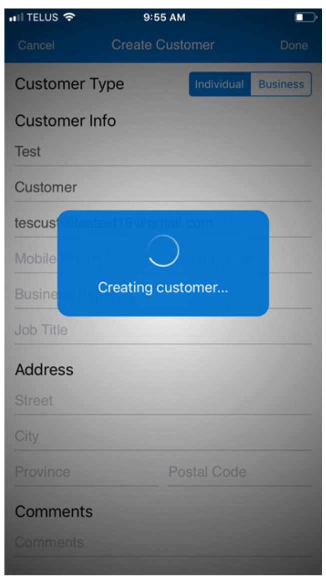
Customers can be added one by one through the app. If you wish to add a large batch of customers, please use the [add customers by bulk] function within the Mobile Pay back office.

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.

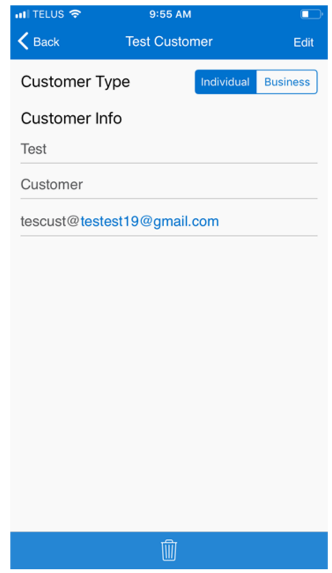


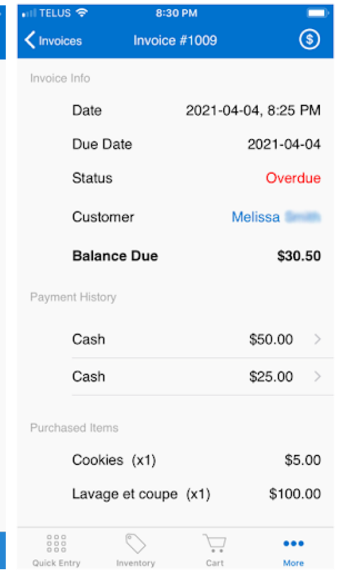


Edit / deleting customers

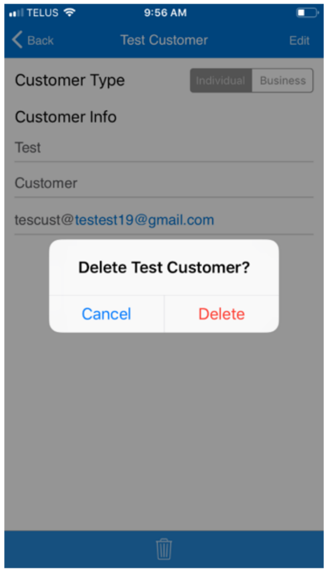
Step 1: Navigate to the **Customers** screen from the main menu and select the customer you would like to edit/delete.

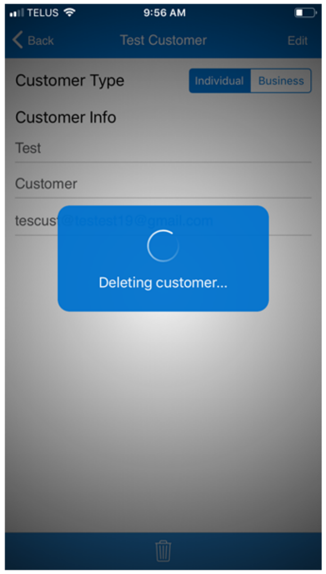
Step 2: Select **Edit** (on the top right corner) or **Delete** (Trash icon) on the bottom of your screen.





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





Back Office

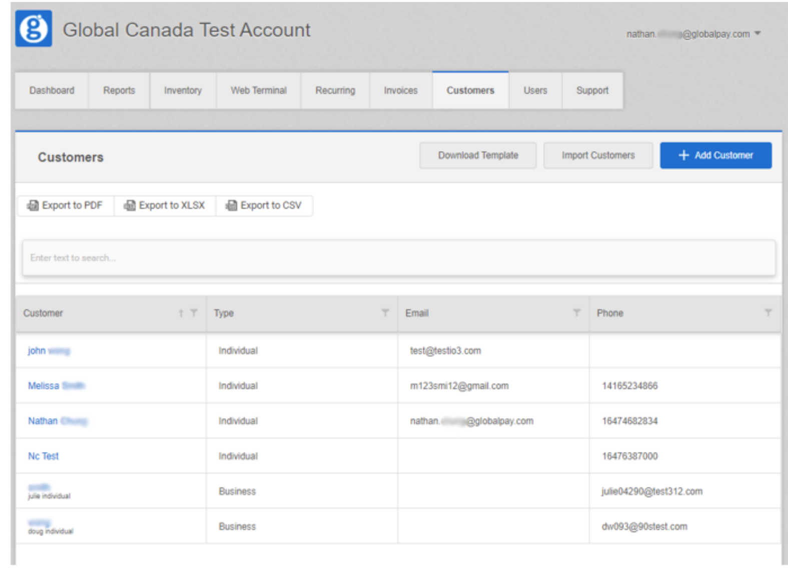
The **Mobile Pay Back Office** is a web portal that you can use to run your business. Access the Back Office through this link: https://mobilepay.globalmpos.ca/.

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

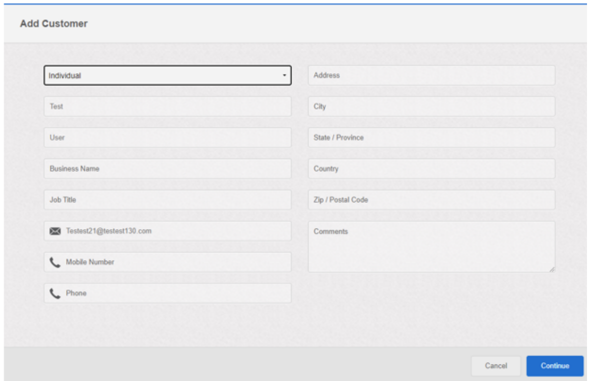
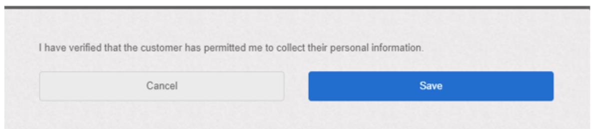
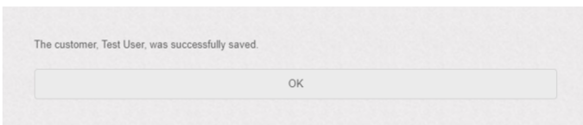
Access your customer database by selecting the **Customers** tab on the main page of the Back Office. Similar to the Mobile App, the Back Office allows you to add, edit and delete customer records. As an additional function that is unique to the Back Office, you may also create more than one customer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

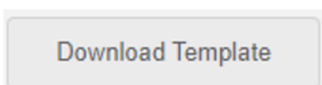
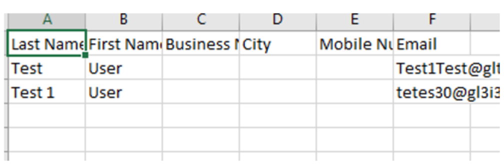


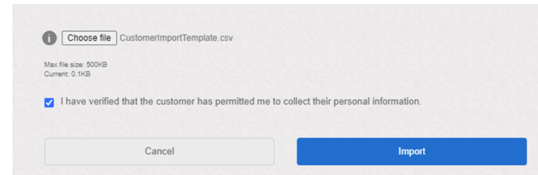
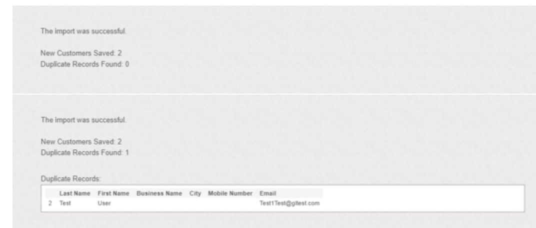
Add customer (one by one)

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

<table>
<tr><td>Step 2: Fill in the customer details, and select Continue</td><td>
</td></tr>
<tr><td>Step 3: Verify that you have the customer’s consent, and select Save</td><td>
</td></tr>
<tr><td>Step 4: Customer is added.</td><td>
</td></tr>
</table>

Add customer by bulk

<table>
<tr><td>Step 1: On the customer database page, select Download Template to download the CSV template file.</td><td>
</td></tr>
<tr><td>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 to be delivered to the customer.</td><td>
</td></tr>
<tr><td>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.</td><td>


</td></tr>
<tr><td>Step 4: The platform will provide the status of the upload.</td><td>
</td></tr>
</table>

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.

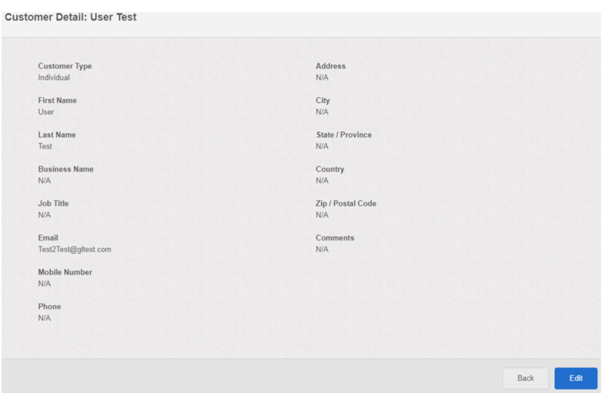
Example 2

- **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

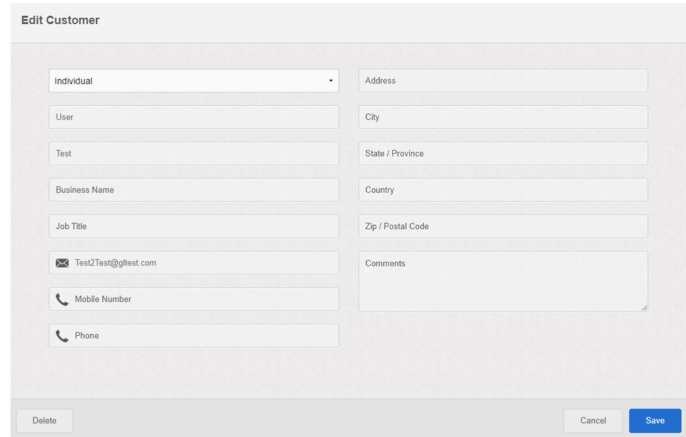
Step 1: On the customer database page, select the customer by clicking their name in the left column.

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



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

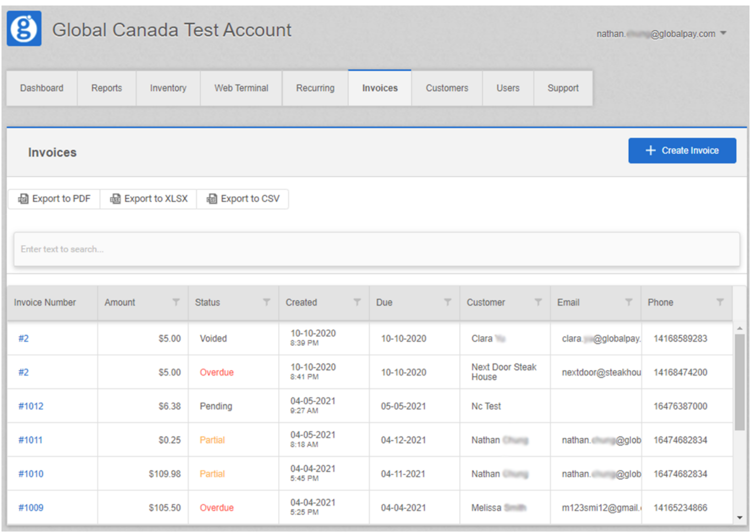
If you would like to delete this record, select **Delete** in the bottom left corner.



Invoice management

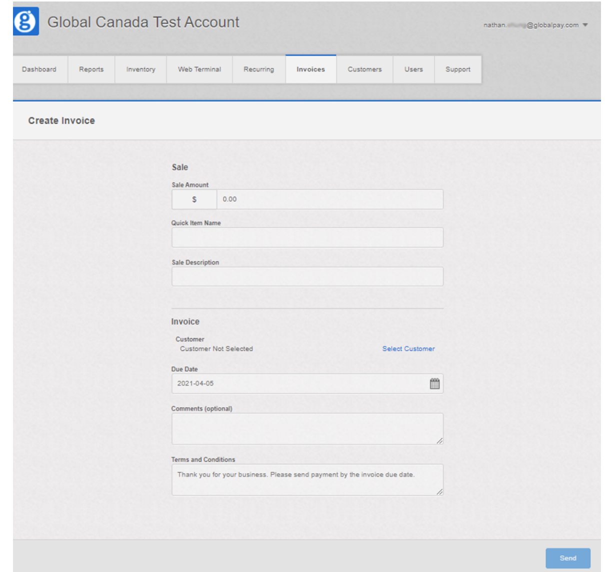
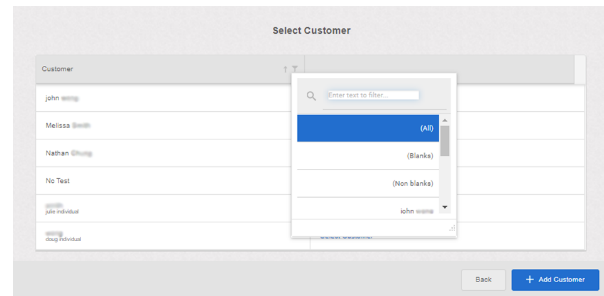
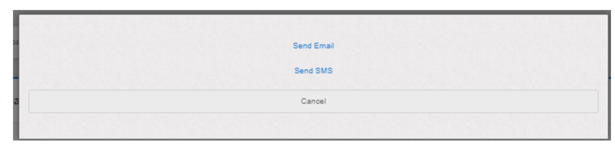
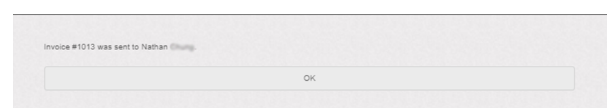
Access your invoice management by selecting the **Invoices** tab on the main page of the Back Office. Similar to the Mobile App, the Back Office allows you to create, review, resend and delete customer invoices. As an additional function that is unique to the Back Office, you may also view and export 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.



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.	

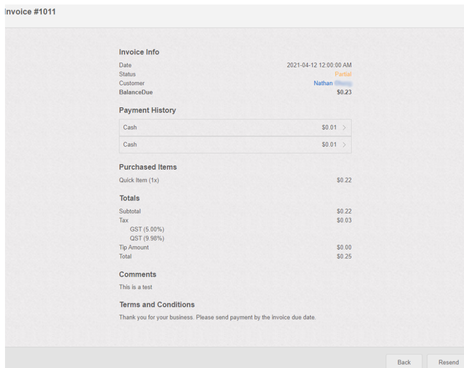
Reviewing / resending / deleting an invoice

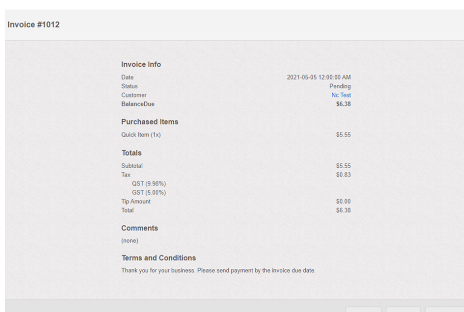
Step 1: Under the **Invoices** tab, select the invoice by clicking the invoice number in blue.

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.



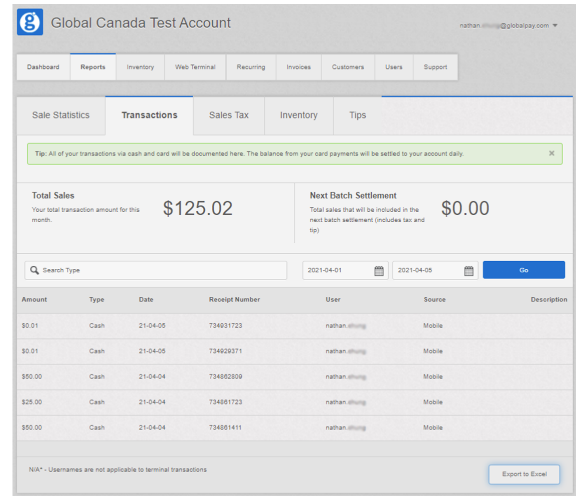


Reports

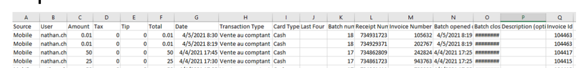
- **Invoice ID** is a new identifier and is a common data point between the three (3) main reports.
- **Receipt numbers** are only common between the **Transaction** and **Inventory** reports.

Transaction report

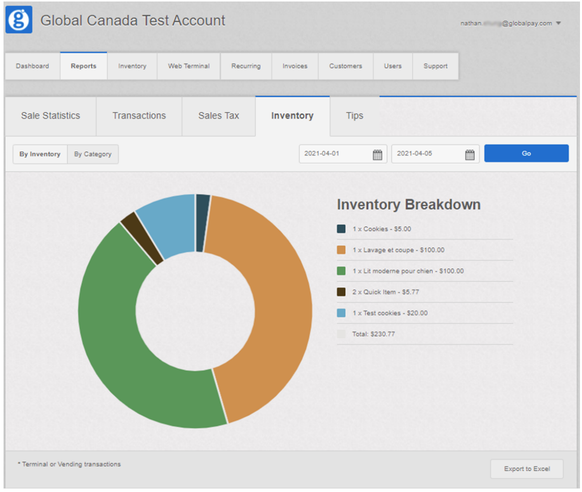
Back Office interface:



Exported file:

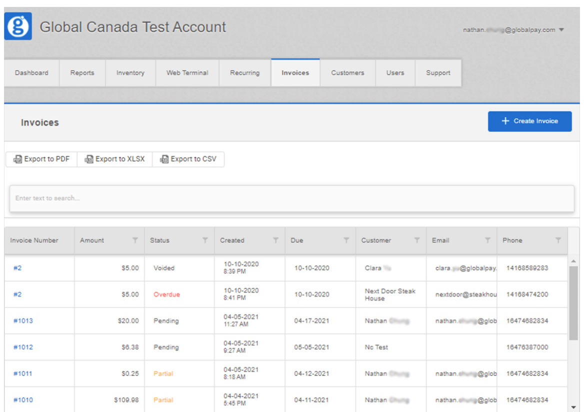


Inventory report



A	B	C	D	E	F	G	H	I	J	K	L
Category	Item	Description	Amount	Quantity	Date	Receipt Number	User	TransactionType	Card Type	Source	Invoice Id
Uncategorized	Test cookies	these cookies a	$20.00	1	4/5/2021 11:27					Invoice	104521
Uncategorized	Quick Item		$5.55	1	4/5/2021 9:27					Invoice	104476
Uncategorized	Quick Item		$0.22	1	4/5/2021 8:18					Invoice	104463
Uncategorized	Lit moderne pour chien		$100.00	1	4/4/2021 17:45					Invoice	104417
food	Cookies		$5.00	1	4/4/2021 17:25					Invoice	104415
grooming service	Lavage et coupe		$100.00	1	4/4/2021 17:25					Invoice	104415

Invoice report



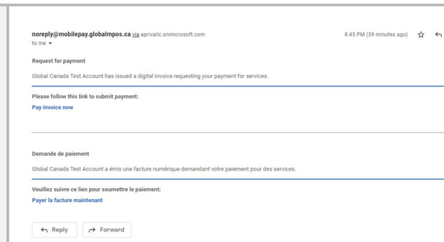
A	B	C	D	E	F	G	H	I	J
Invoice Number	Amount	Status	Created	Due	Customer	Email	Phone	Invoice Id	BalanceDue
2	5	Voided	2020-10-10	2020-10-10	Clara	clara.	14168589	74253	5
2	5	Overdue	2020-10-10	2020-10-10	Next Door Steak House	nextdoor	14168474	74254	5
1013	20	Pending	2021-04-05	2021-04-17	Nathan	nathan.ch	1647468	104521	20
1012	6.38	Pending	2021-04-05	2021-05-05	Nc Test		1647638	104476	6.38
1011	0.25	Partial	2021-04-05	2021-04-12	Nathan	nathan.ch	1647468	104463	0.23
1010	109.98	Partial	2021-04-04	2021-04-11	Nathan	nathan.ch	1647468	104417	59.98
1009	105.5	Overdue	2021-04-04	2021-04-04	Melissa	m123smi1	1416523	104415	30.5
1008	11.5	Overdue	2021-03-22	2021-03-29	Nathan	nathan.ch	1647468	102139	11.5
1007	5.5	Overdue	2021-01-21	2021-01-21	Nathan	nathan.ch	1647468	89891	5.5
1006	0.22	Overdue	2020-10-19	2020-10-19	Natha	nathan.ch		75333	0.22
1005	0.01	Voided	2020-10-10	2020-10-10	Test Test	chrome.j	14168589	74245	0.01
1004	70	Overdue	2020-06-10	2020-06-17	Nathan	nathan.ch		56973	70
1003	0.25	Overdue	2020-06-10	2020-06-17	Nathan	nathan.ch		56972	0.25
1002	45	Overdue	2020-05-12	2020-05-12	Nathan	nathan.ch		50897	45
1001	75.58	Overdue	2020-05-12	2020-06-12	Flora	flora.		50896	75.58
1	10	Overdue	2020-10-10	2020-10-10	Clara	clara.	14168589	74252	10

Customer-facing content

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

Email invoice

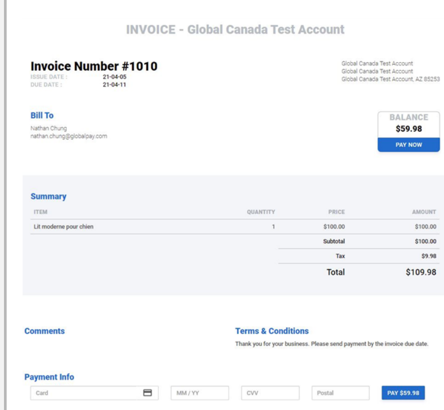
This is a sample bilingual invoice that a customer would receive via email.



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.



Sample bilingual receipt

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

noreply@mobilepay.globalmpos.ca via aprivallc.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

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
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'ENTENTE DE L'ÉMETTEUR DE CARTES (ENTENTE DU MARCHAND, SI NOTE DE CRÉDIT)

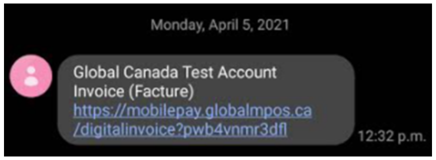
Merci pour votre entreprise

Thank You For Your Business
www.globalcanada.ca

Política 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.