

ACTIVE POS for AWE and CCM User Guide

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About ACTIVE Network, LLC

ACTIVE Network, LLC is a technology and media company that helps millions of people find and register for things to do and helps organizations increase participation in their activities and events.

For more information about ACTIVE Network, LLC products and services, please visit ACTIVEnetwork.com.

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About ACTIVE POS

ACTIVE POS allows event organizers, staff and volunteers to easily make sales, process transactions, track orders and issue refunds onsite at an event.

ACTIVE POS:

- Integrates seamlessly with ACTIVEWorks Endurance and Camps and Class Manager.
- Loads your event merchandise for on-site sale into the app.
- Easily switches between different events.
- Accepts cash and credit card payments.
- Supports MagTek card readers.
- Supports offline mode (swipe card only, no manual entry) in case of no or limited internet connectivity.
- Automatically processes offline transactions when the device regains internet connectivity.
- Allows users to search and view order details anytime, anywhere.

Note: Due to security requirements, the ACTIVE POS app CANNOT be run on jailbroken or rooted tablet devices.

Setting up the app

System requirements

ACTIVE POS is designed for use on:

- Apple iPad tablets running iOS 15.1 or later.
- Android tablets running Android 12 or later.

Note: The currency displayed by ACTIVE POS follows the locale and corresponding currency as set for the selected event. ACTIVE POS supports the following currencies:

Locale	Locale code	Currency
English (Canada)	en_CA	$
English (Ireland)	en_IE	€
English (United Kingdom)	en_GB	£
English (United States)	en_US	$
French (Canada)	fr_CA	$
French (France)	fr_FR	€
German (Austria)	de_AT	€
German (Germany)	de_DE	€
Italian (Italy)	it_IT	€
Spanish (Spain)	es_ES	€

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Installing peripherals

Installing a card reader

ACTIVE POS supports the following bank card readers:

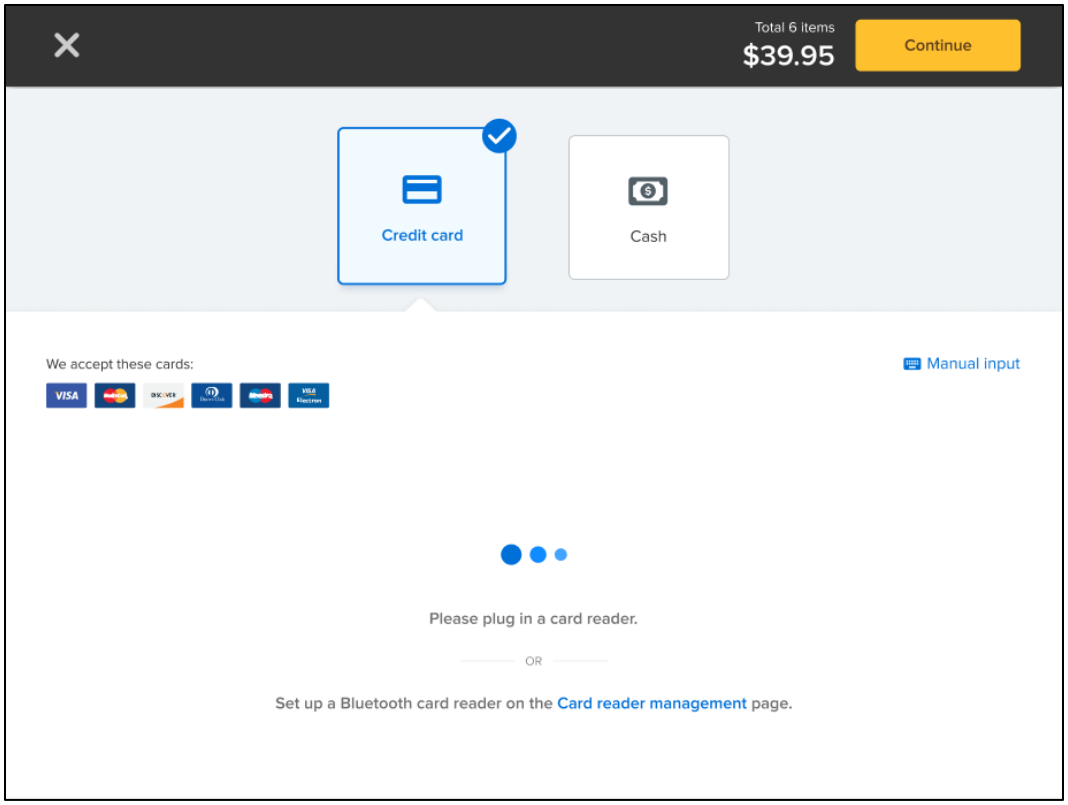
- For Apple iPad tablets:
    - MagTek iDynamo 5 (Gen II) Secure Card Reader (Magtek PN: 21087013 REV – H) (https://www.magtek.com/product/idynamo)
    - MagTek iDynamo 6 Lightning Secure Card Reader (Magtek PN: 21087016) (https://www.magtek.com/product/idynamo-6)
    - MagTek iDynamo 6 USB-C Secure Card Reader (Magtek PN: 21087023) in iAP communications mode (https://www.magtek.com/product/idynamo-6)
    - MagTek tDynamo Bluetooth Secure Card Reader (https://www.magtek.com/product/tdynamo)
- For Android tablets:
    - MagTek uDynamo Audio Jack Swipe Card Reader (Magtek PN: 21073092 REV – C) (https://www.magtek.com/product/udynamo)
    - MagTek iDynamo 6 USB-C Secure Card Reader (Magtek PN: 21087023) in HID communications mode (https://www.magtek.com/product/idynamo-6)
    - MagTek tDynamo Bluetooth Secure Card Reader (https://www.magtek.com/product/tdynamo)

If the card reader was purchased:

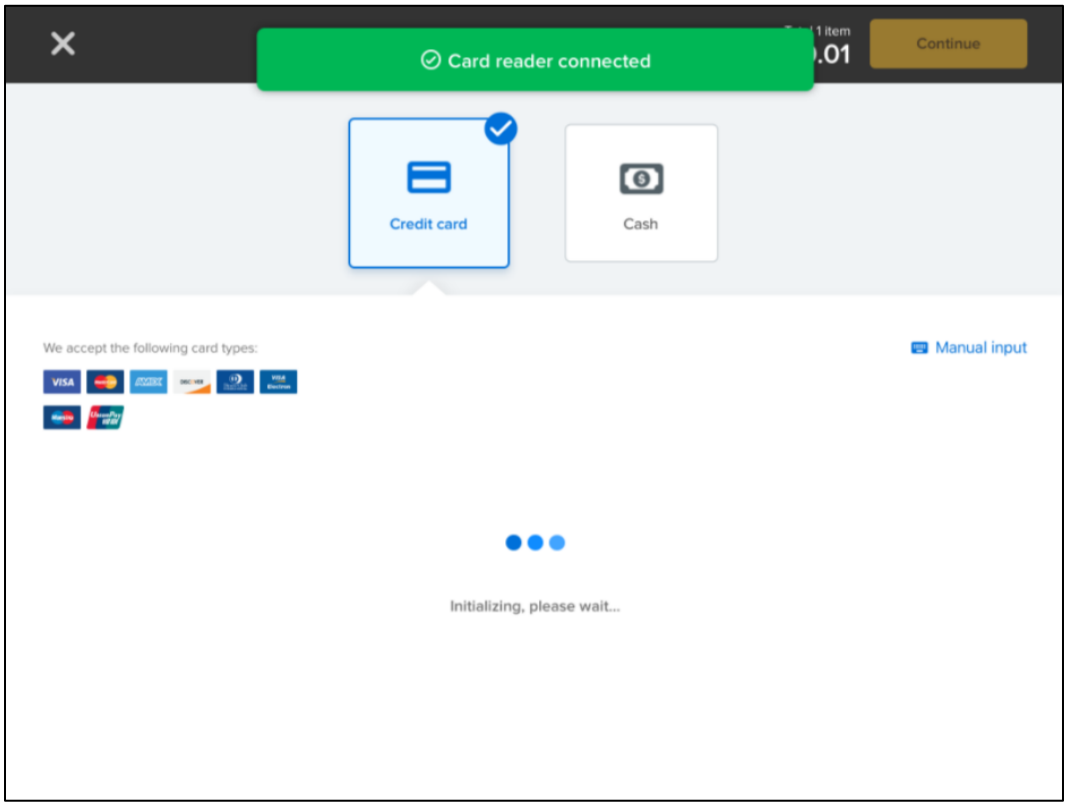
- directly from ACTIVE, then it is preconfigured with the correct Key Set ID (KSID) and can be connected your mobile POS device without further configuration.
- from MagTek or a 3rd-party supplier, then you must configure the Key Set ID (KSID) on the card reader by following the instructions in:
    - Appendix I: Reconfiguring iDynamo iOS card reader Key Set IDs
    - Appendix II: Reconfiguring uDynamo Android card reader Key Set IDs

Before a card reader is connected, the POS checkout screens on iPad/iPad mini and Android tablets display an instruction text indicating users to connect the card reader:

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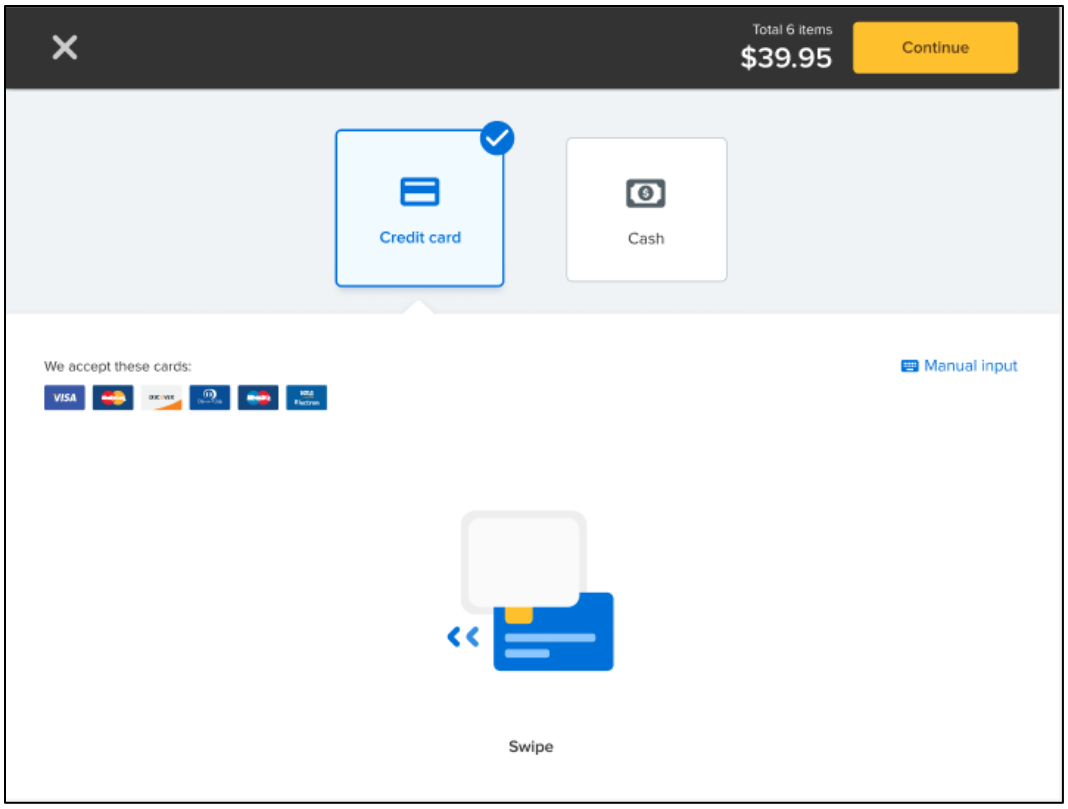


Once the card reader is connected, the **Card reader connected** message appears together with **Initializing, please wait…**.



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After initialization, the screen appears as follows:



To install a card reader on the mobile POS device:

- For Apple iPad devices, if the card reader is a:
  - MagTek iDynamo 5 (Gen II) Secure Card Reader, then plug the card reader into the Lightning port.
  - MagTek iDynamo 6 Lightning Secure Card Reader, then plug the card reader into the Lightning port.
  - MagTek iDynamo 6 USB-C Secure Card Reader, then plug the card reader into the USB-C port (**Note**: the card reader must be in in iAP communications mode; to switch to iAP communications mode, please refer to MagTek iDynamo 6 documentation).
  - MagTek tDynamo Bluetooth Secure Card Reader, then follow the procedure in Installing Magtek tDynamo Bluetooth Secure Card Readers.
- For Android tablets, if the card reader is a:
  - MagTek uDynamo Audio Jack Swipe Card Reader, then plug the card reader into the headphone socket.
  - MagTek iDynamo 6 USB-C Secure Card Reader, then plug the card reader into the USB-C socket (**Note**: the card reader must be in in HID communications mode; to switch to HID communications mode, please refer to MagTek iDynamo 6 documentation).
  - MagTek tDynamo Bluetooth Secure Card Reader, then follow the procedure in Installing Magtek tDynamo Bluetooth Secure Card Readers.

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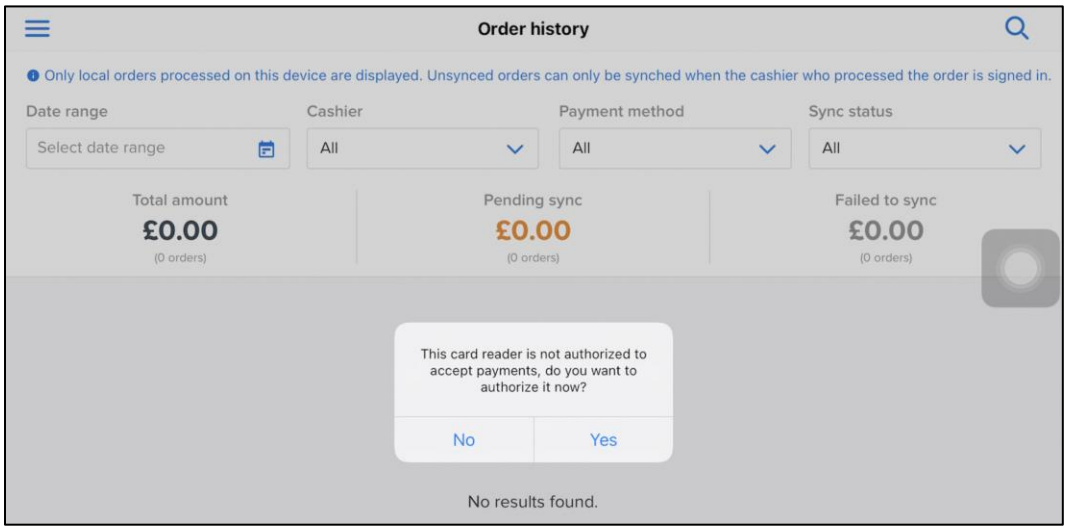
iPad or iPad mini



Android



On first connection to the mobile POS device, you must register the card reader with the POS app (unregistered card readers cannot accept payments):



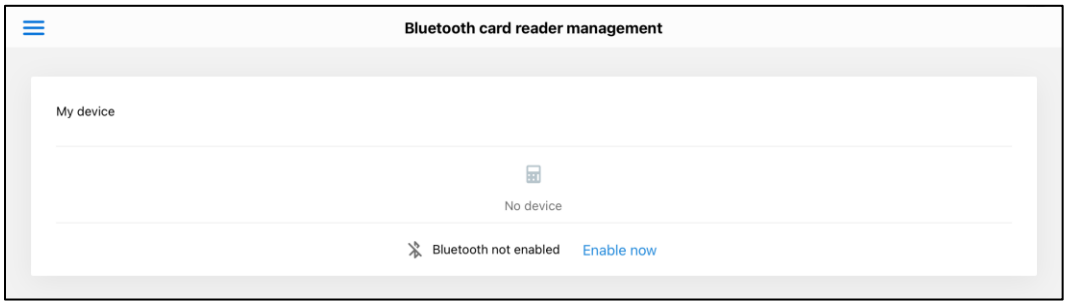
Note: if the card reader fails to process transactions, then please refer to:

- Appendix I: Reconfiguring iDynamo iOS card reader Key Set IDs
- Appendix II: Reconfiguring uDynamo Android card reader Key Set IDs

Installing Magtek tDynamo Bluetooth Secure Card Readers

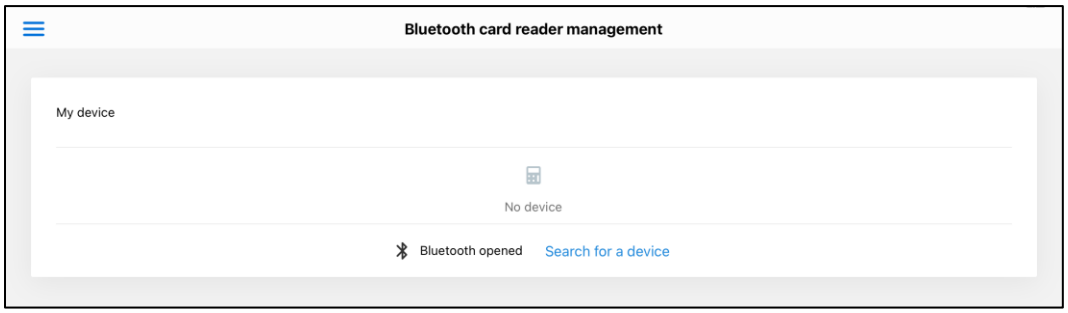
To install a Magtek tDynamo Bluetooth Secure Card Reader:

1. Tap ≡ > **Bluetooth card reader management**.
    - If Bluetooth on your tablet is not enabled, then tap **Enable now**:

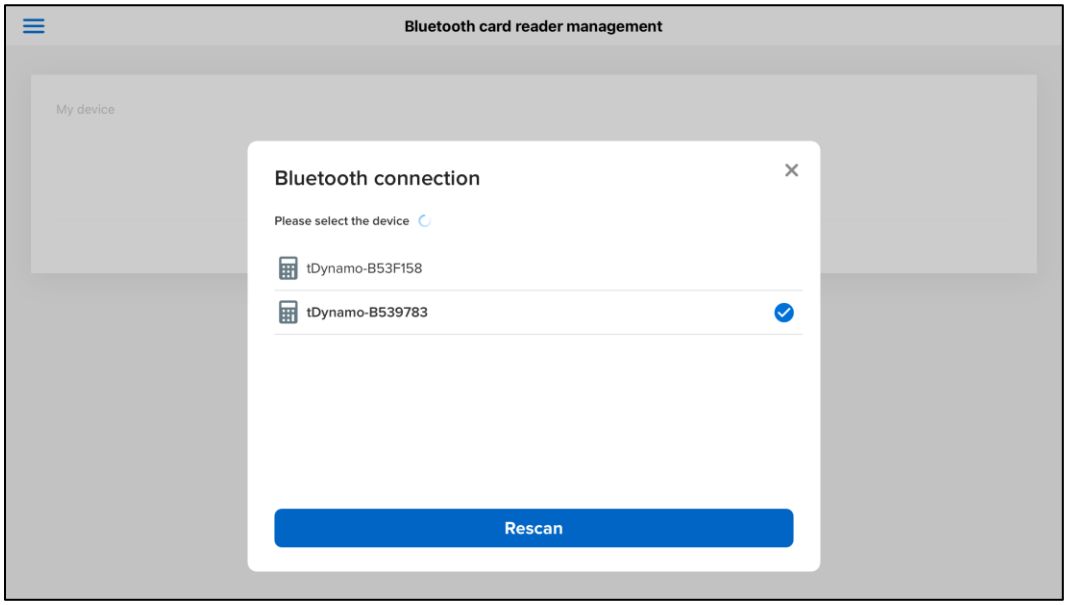


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2. Enable a new Bluetooth pairing on the Magtek tDynamo Bluetooth Secure Card Reader by pressing and holding the pairing pushbutton for 2 seconds until the General Status LED flashes three times, then release the pushbutton to enter Pairing Mode.
    - The General Status LED flashes blue for up to 2 minutes or until a host pairs or connects.
3. Search for the Magtek tDynamo Bluetooth Secure Card Reader by tapping **Search for a device**:

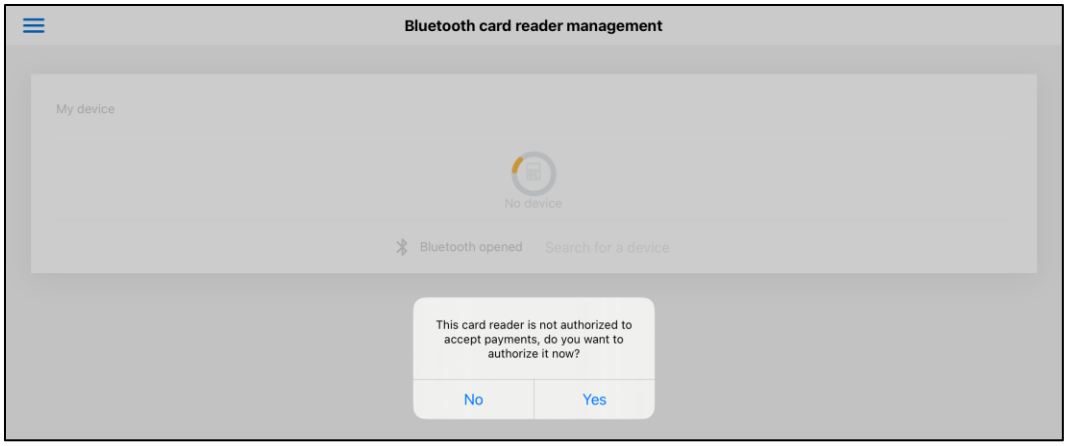


4. To connect to a Magtek tDynamo Bluetooth Secure Card Reader, tap the required device:

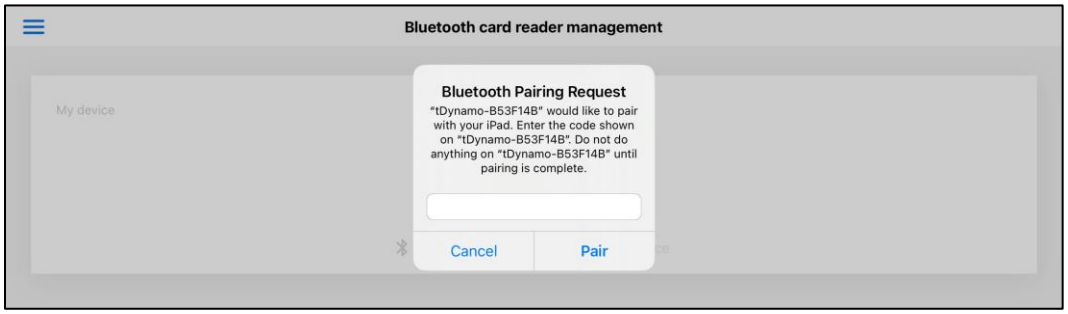


- If the required card reader is:
    - Not listed, then move the card reader closer to the POS tablet and tap the **Rescan** button.
    - Not authorized to accept payments, then tap Yes to authorize it:

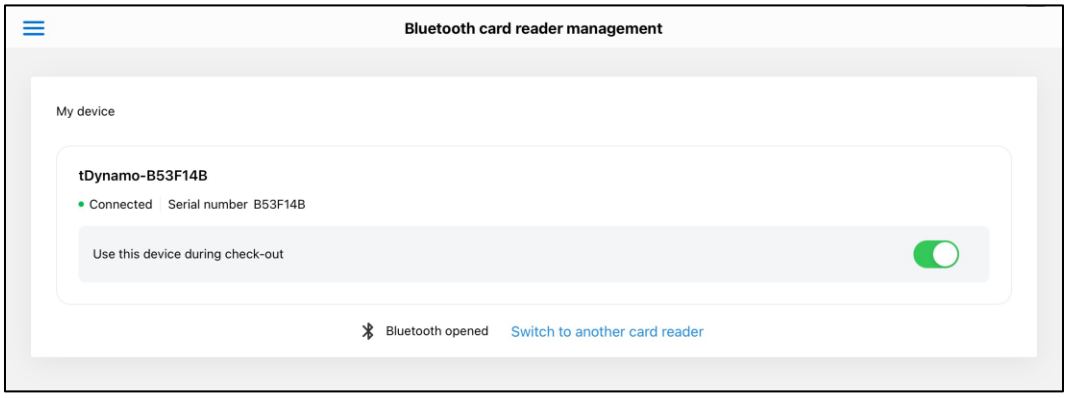
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5. Authorize pairing with the Magtek tDynamo Bluetooth Secure Card Reader by entering the Magtek tDynamo Secure Card Reader's passkey (default: 000000) and then tapping the **Pair** button:



6. To enable usage of the Magtek tDynamo Bluetooth Secure Card Reader during checkout, turn on the **Use this device during check-out** switch.
    - To use a plug-in card reader, this switch must be turned off.



For information on the Magtek tDynamo's operating modes and status LEDs, please refer to Appendix III: Magtek tDynamo Bluetooth Secure Card Reader Operating Modes and Status LEDs.

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Setting up item barcodes

ACTIVE POS supports on-site sales by scanning item barcodes. To generate barcodes for merchandise items, agency administrators or supervisors must:

1. Acquire product IDs by contacting ACTIVE Support (support.activenetwork.com/endurance or clientcare@activenetwork.com)
2. Generate barcodes from the product IDs using a third-party barcode tool. The following barcode types are supported:
   - Code 128 (recommended by ACTIVE POS)
   - Aztec
   - Code 39
   - Code 93
   - Codabar
   - EAN-13
   - EAN-8
   - PDF417
   - QR
   - UPC-E
   - ITF
   - UPC-A
   - Data Matrix (when available)
3. Print out the barcodes and affix them to the corresponding items.

For more information on using this feature, see Adding items by scanning item barcodes.

How is credit card information secured?

- For credit card transactions, sensitive data on the magnetic stripe is encrypted and protected by the card reader.
- When the network is connected, encrypted sensitive data is transmitted from the card reader to the PCI-DSS compliant AMS environment and is not stored in the application or the mobile POS device.
- When the network is not available (offline mode), credit card payments are only accepted by swiping the card through the card reader. Encrypted sensitive data is stored in the mobile POS device until it regains internet connection and is then submitted to the PCI-DSS compliant AMS environment.

Security recommendations

To ensure the confidentiality of customers' credit card data and to prevent misuse of their credit card accounts, please observe the following recommendations:

For agency administrators/supervisors:

- Ensure that the mobile POS device is protected by a secure PIN code and configure the device to self-lock when not in use.
- Ensure that operating system updates and security patches are installed in a timely manner.
- Do not root or jailbreak the mobile POS device or install any unauthorized applications.

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- Do not uninstall the app until it is confirmed that all offline orders have been processed, otherwise pending orders made in offline mode might be lost.
- Only connect to a secure, WPA/WPA2 password-protected Wi-Fi network or a trusted cellular data network. For more information about Wi-Fi network security, please see Tips for Using Public Wi-Fi Networks.
- Disable any unused wireless interfaces (such as Bluetooth or Cellular) on the mobile POS device.
- Restrict access to the mobile POS device to only authorized personnel.

For ACTIVE POS app users:

- Do not leave the mobile POS device unattended or allow unauthorized personnel to use it.
- Do not disclose the mobile POS device passcode (it is strongly recommended that a secure passcode is set on the mobile POS device; if no device passcode has been set, then the POS app will remind users to set a passcode).
- Lock the mobile POS device when it is not in use.
- Do not uninstall the app, otherwise pending orders made in offline mode might be lost.
- Do not install any unauthorized applications on the device.
- Do not connect any unauthorized peripherals to the device.
- Do not connect the device to any unauthorized wireless networks.
- Cardholder information (such as name, address and card details) must be treated as confidential and must not be divulged to anyone.
- If the device has been accessed by unauthorized persons or is lost, report this immediately to your supervisor.

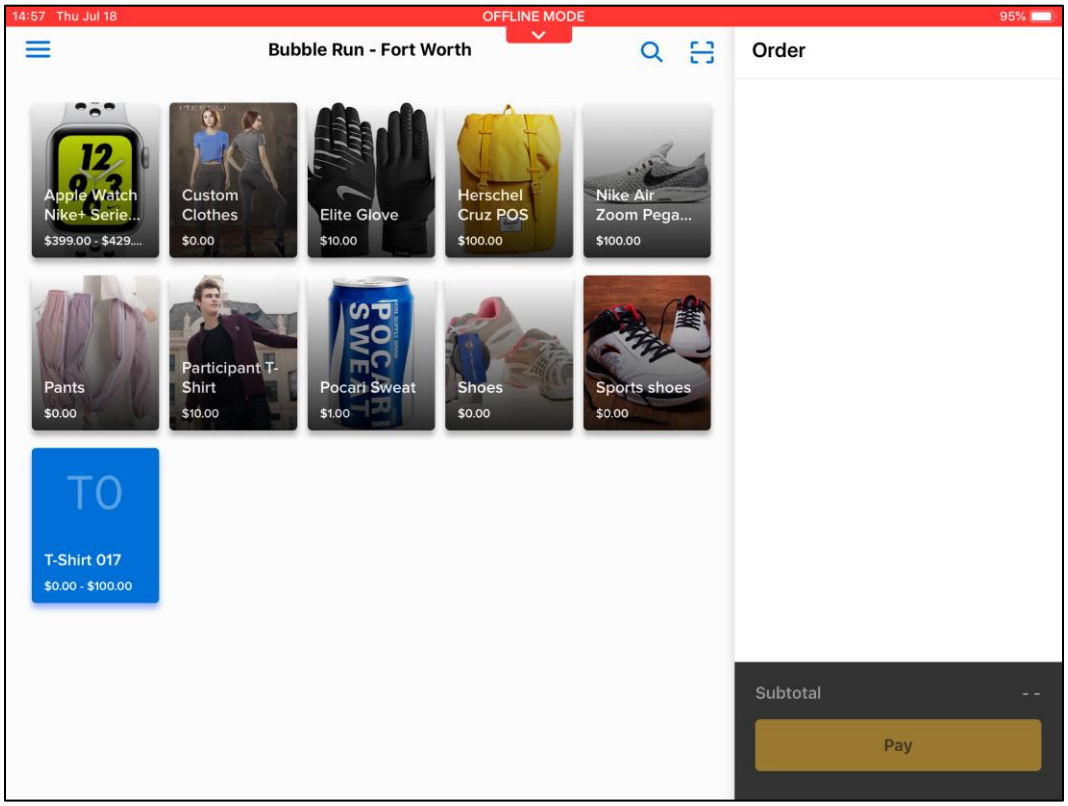
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Offline mode

During an event sale, if the network is disconnected, then ACTIVE POS automatically switches to offline mode (indicated by a red **OFFLINE MODE** status bar on top), allowing you to continue with the sale. Offline mode credit card transactions will be processed automatically once the mobile POS device reconnects to the network within 72 hours.

After switching to offline mode:

- Only cash and swiped card payments are accepted.
- Manual entry of credit card information is NOT permitted.
- Coupons are NOT supported (the coupon field is disabled).
- If any coupons were applied to the current order before the mobile POS device goes offline, then discounts for these coupons are converted to ad-hoc discounts, so that the order total is unchanged (**Note**: the converted ad-hoc discounts can be removed but not edited). The previously applied coupons are then removed.
- Encrypted sensitive credit card data is stored in the mobile POS device until it reconnects to the network and is then submitted to the PCI-DSS compliant AMS environment.



Note:

- Offline mode credit card transactions will expire if not submitted within 72 hours.
- If you log out before offline mode credit card transactions can be submitted, then you must log back in within 72 hours to process the payments.

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- The agency will be responsible for any expired, declined or disputed card payments accepted while in offline mode. Please verify the cardholder's name and the card expiration date to ensure it is a valid card.
- The agency will be charged processing fees for both online and offline orders.
- Submissions of offline cash payments do not have a time limit.
- Do not uninstall the app, otherwise pending orders made in offline mode might be lost.
- Email receipts for offline orders will be sent after the orders are successfully processed.
- An order in progress during a transition from offline to online mode will be checked-out as an offline order; subsequent orders will be processed as online orders.

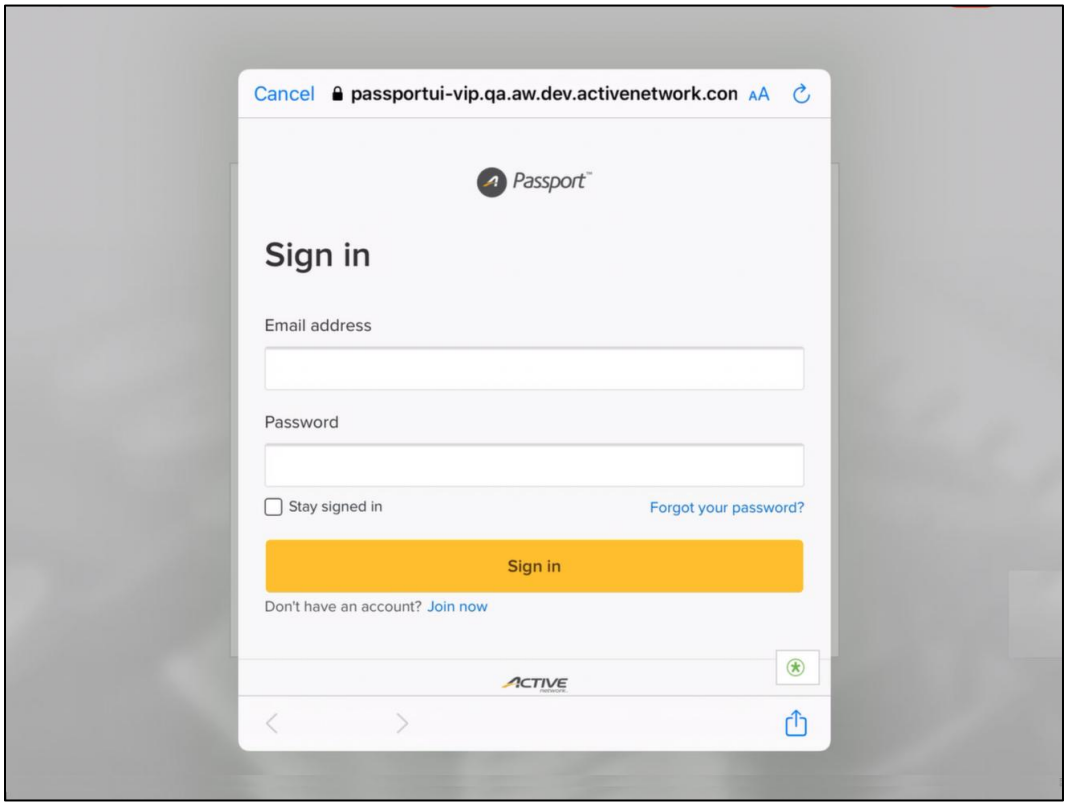
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Selling items with ACTIVE POS

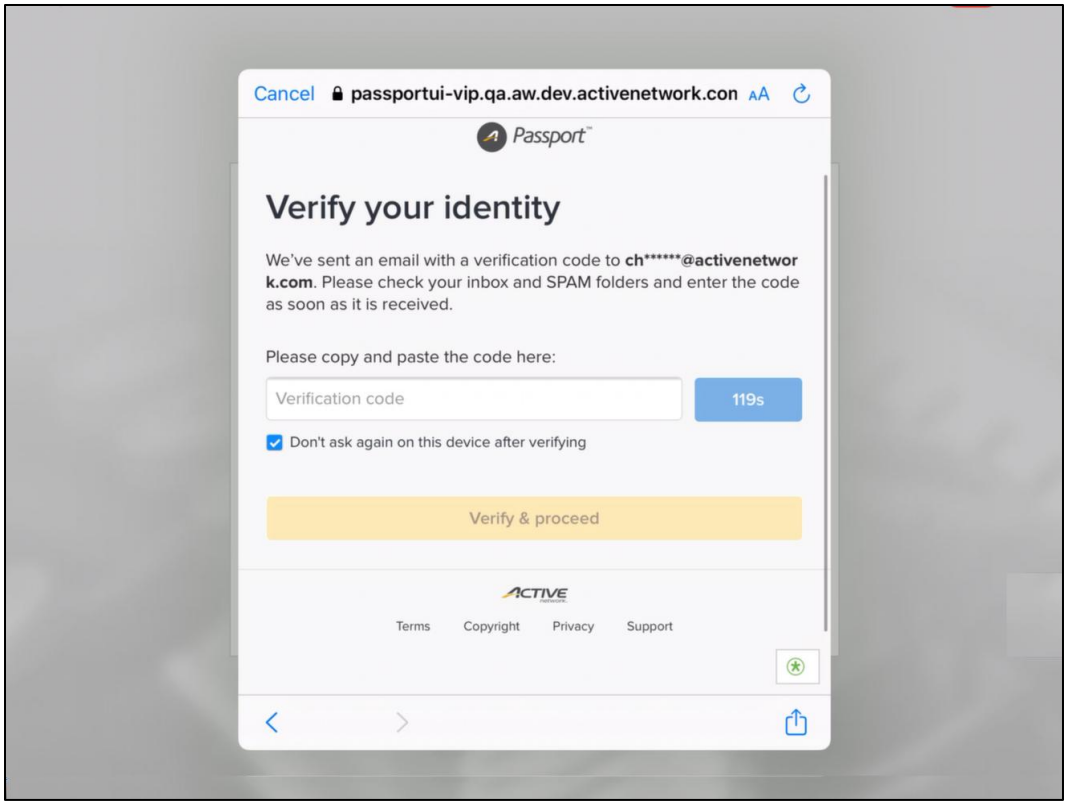
Signing in and selecting an event

To sign into ACTIVE POS and select an event:

1. Tap the app icon and enter your Active Passport credentials and the verification code sent to your email address or mobile phone:

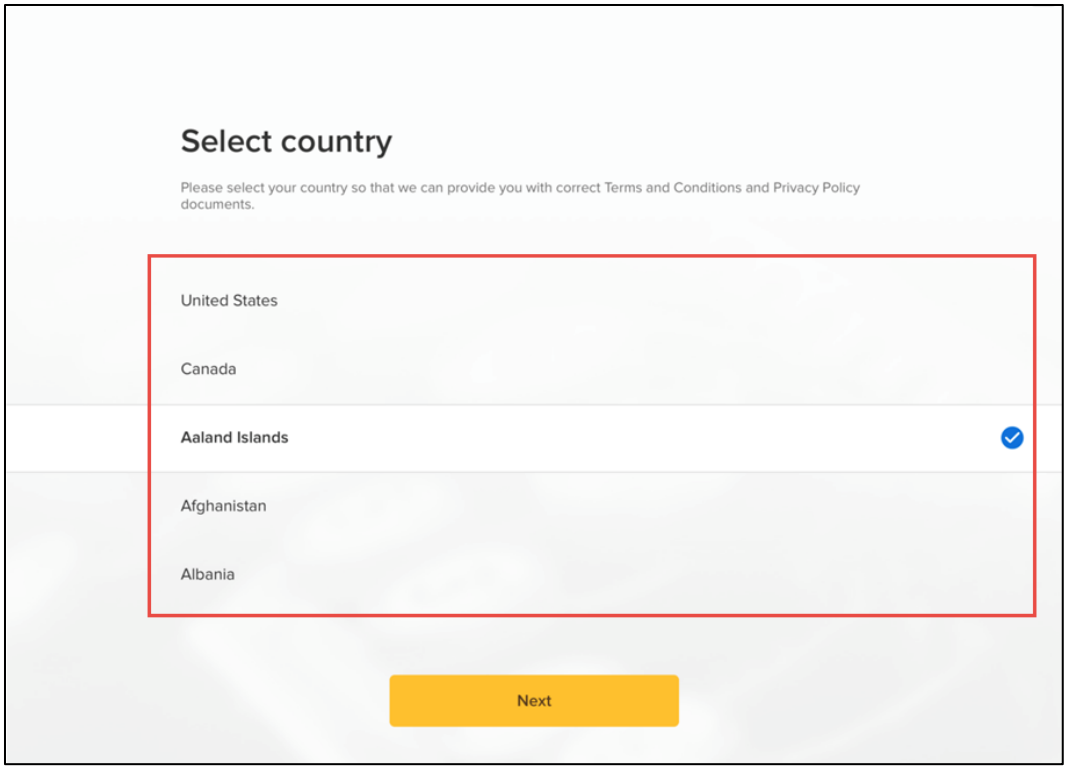


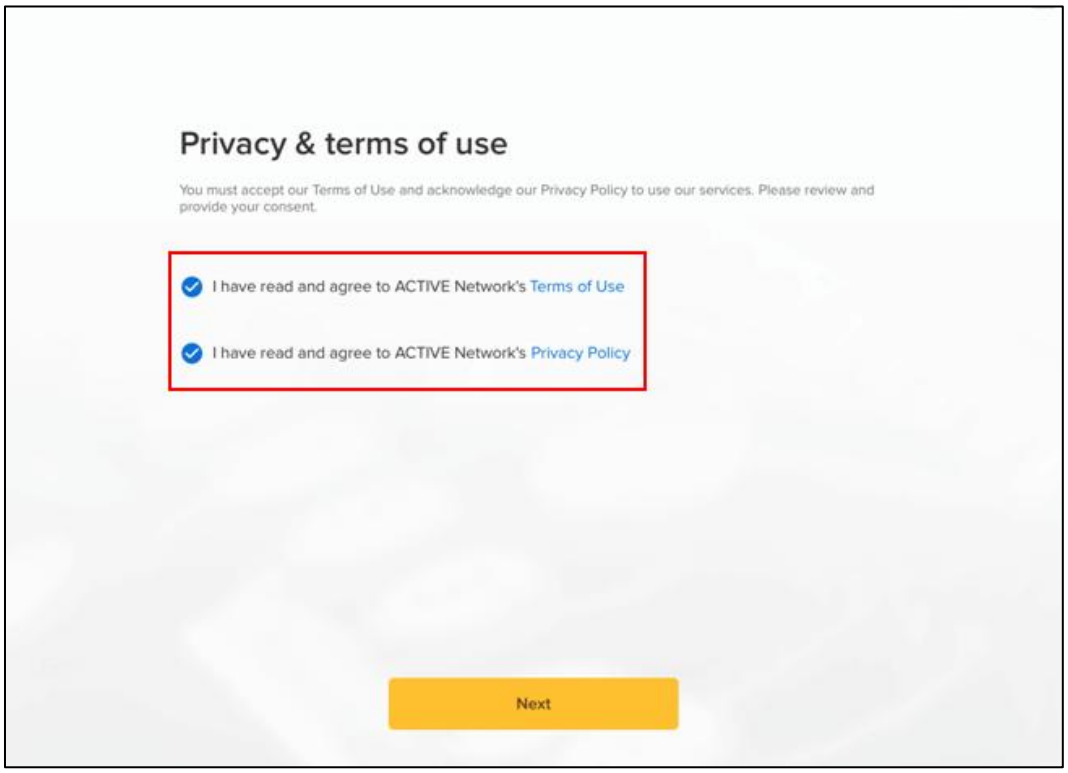
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2. (optional) For GDPR-compliant agencies where users must sign or re-sign the ACTIVE Terms of Use and Privacy Policy waivers, the **Select country** screen is displayed. Tap your country or region and then tick the waivers.

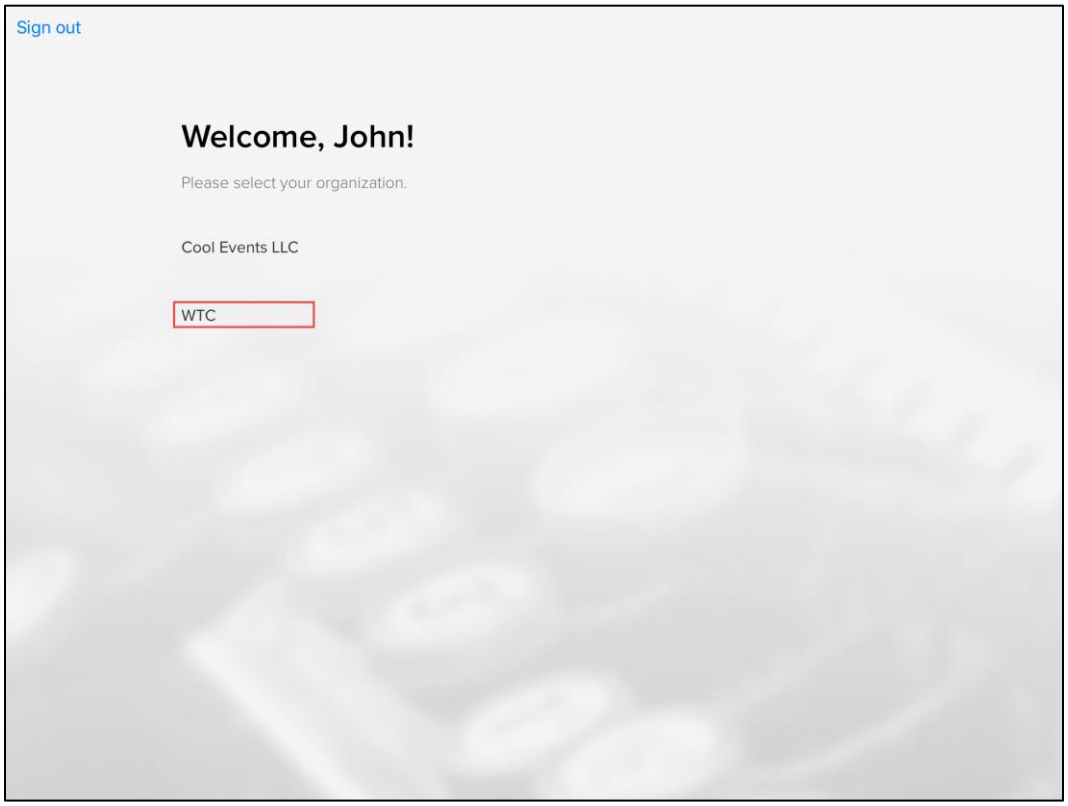
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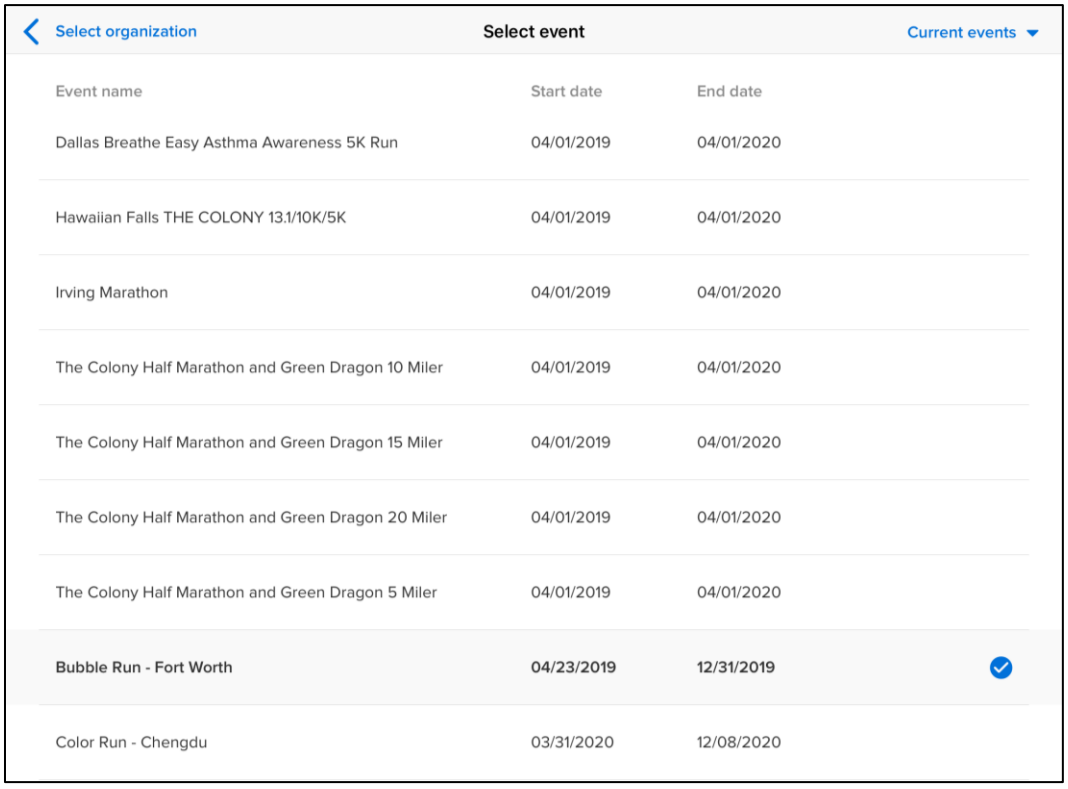


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3. If your account is associated with multiple organizations, then tap the required organization.

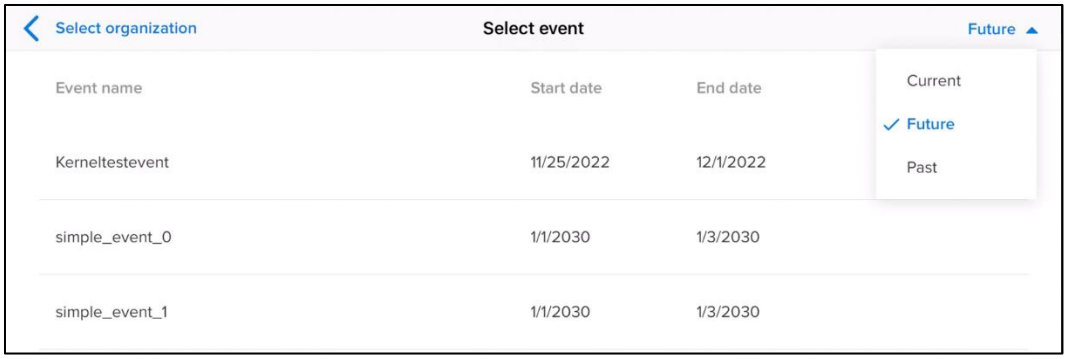


4. Tap the required event.

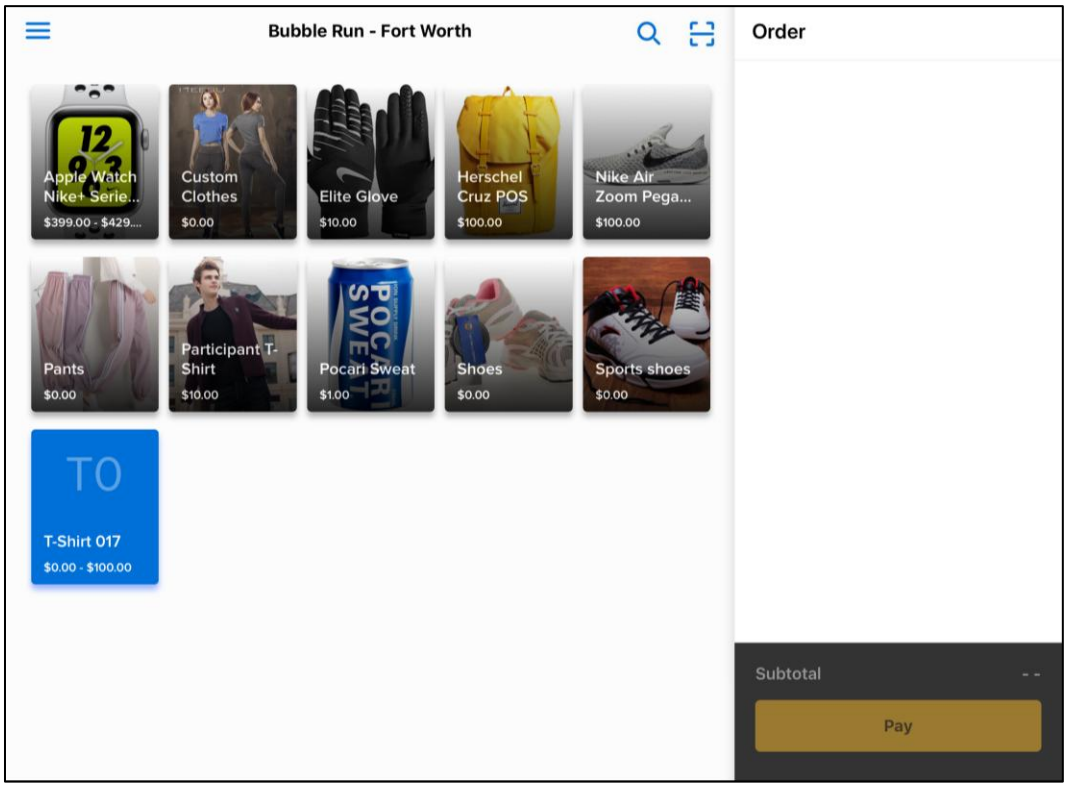


If you need to select an event, then tap **Current, Future** or **Past**.

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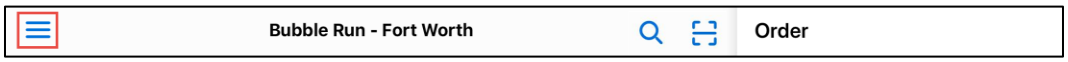
Available merchandise for this event is loaded and displayed.



Switching between events

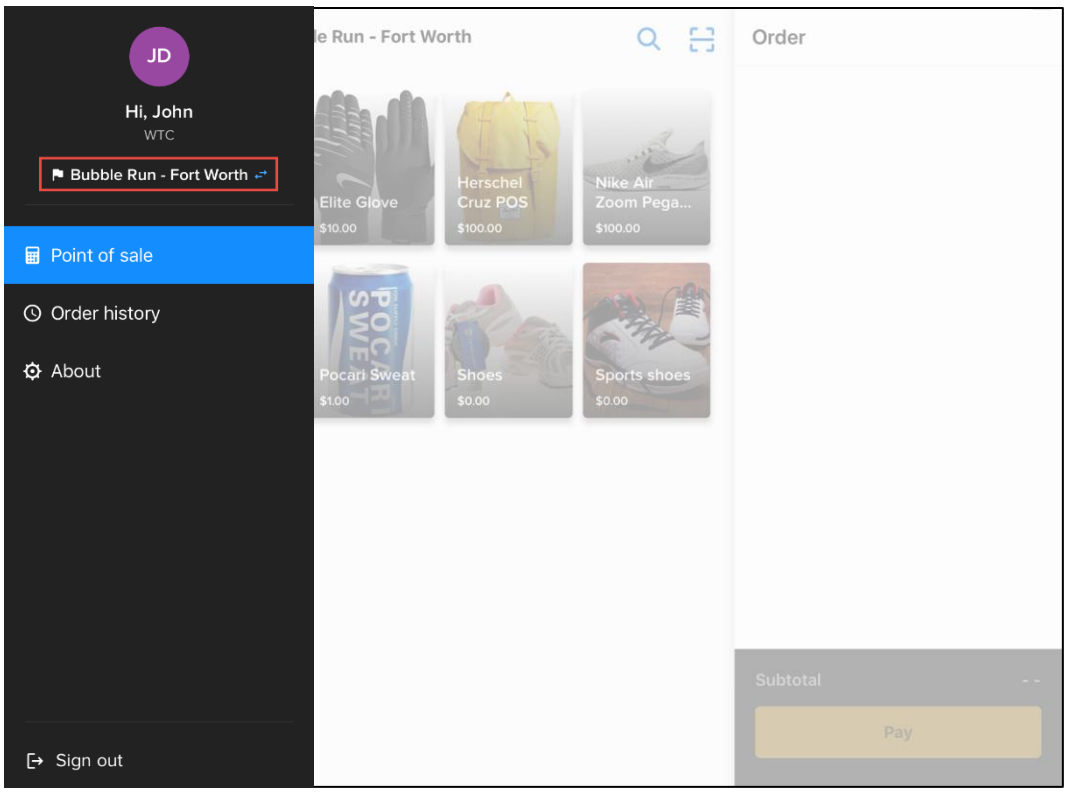
When the mobile POS device is connected (online), you can switch to another event:

1. Tap the ≡ menu icon on the upper left.

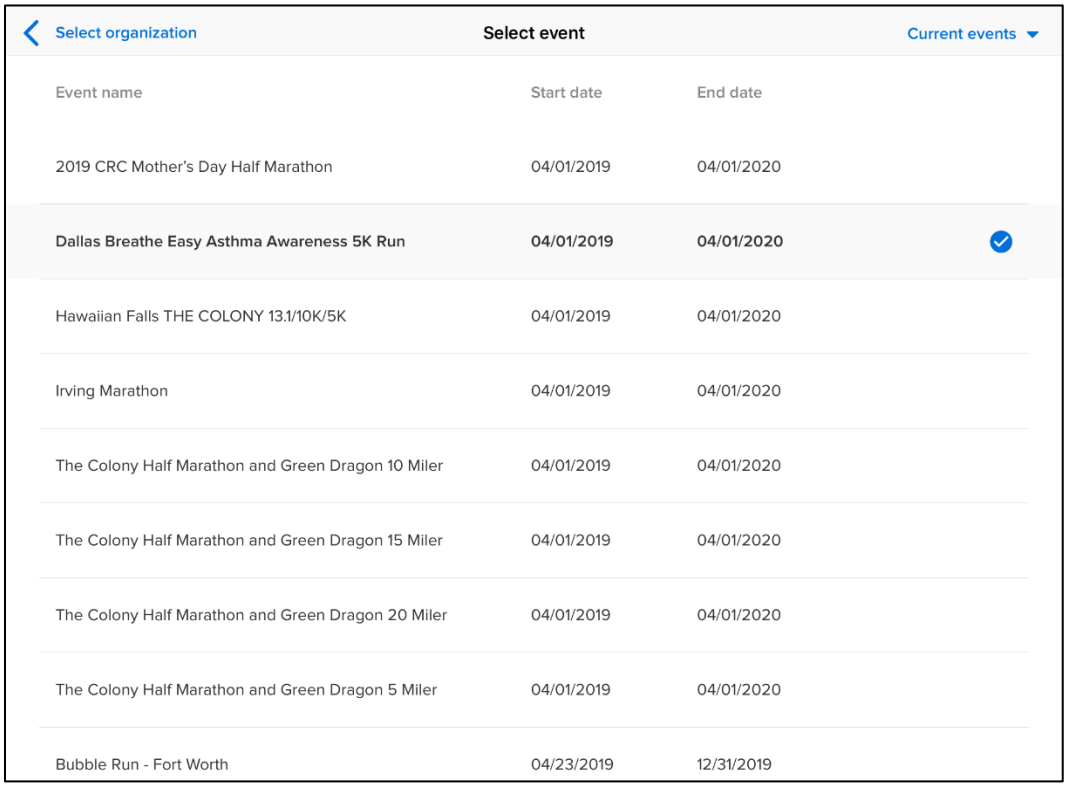


2. In the navigation pane, tap the current event.
   Note: Changing to another event will remove all items in the current **Order**.

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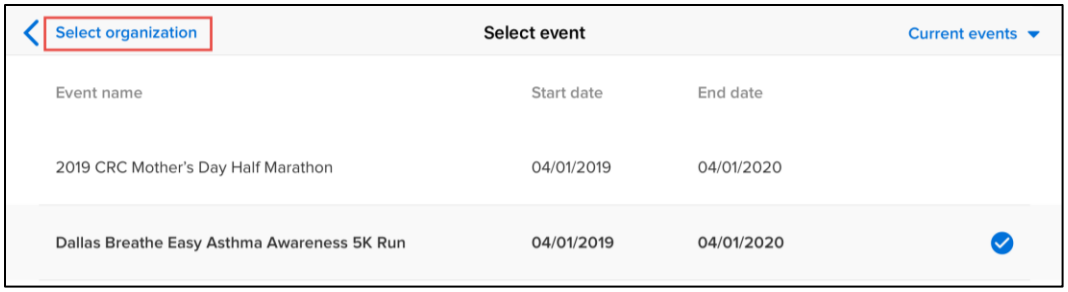


3. On the **Select event** screen, tap the required event.



Note: if your account is associated with multiple organizations, then a **Select organization** link is displayed on the **Select event** screen, allowing you to switch to a different organization if required.

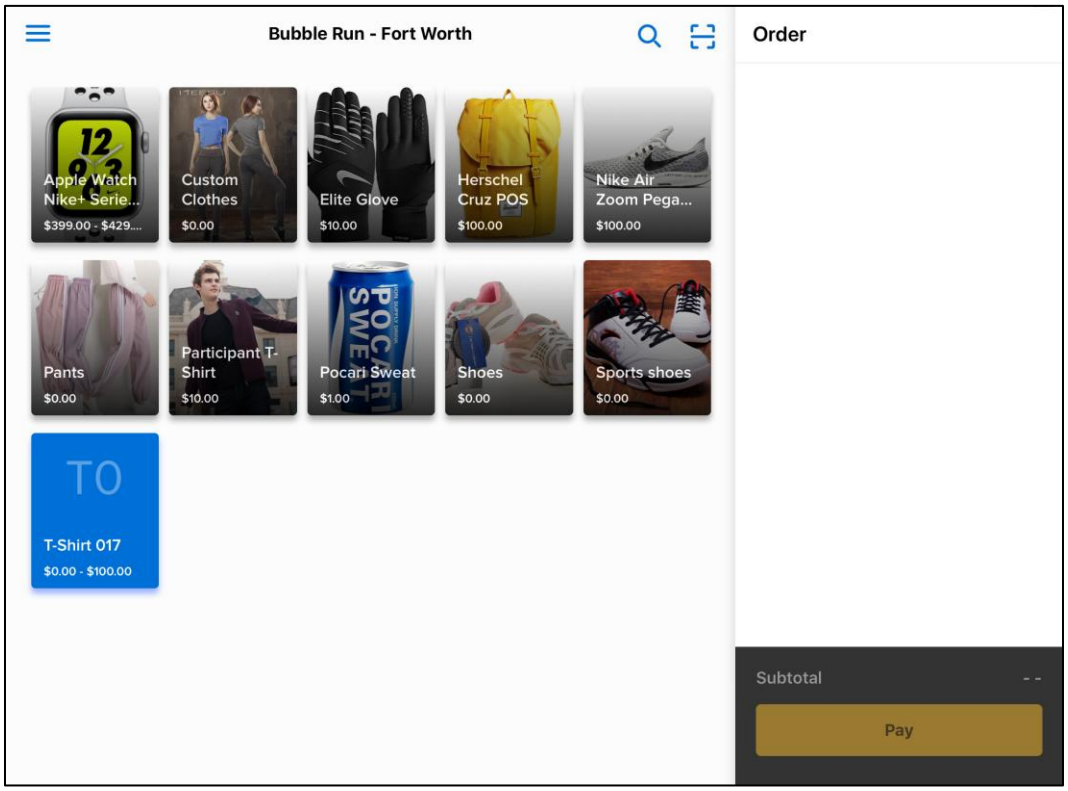
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Adding items to the order

The main merchandise sales screen is divided into two sections:

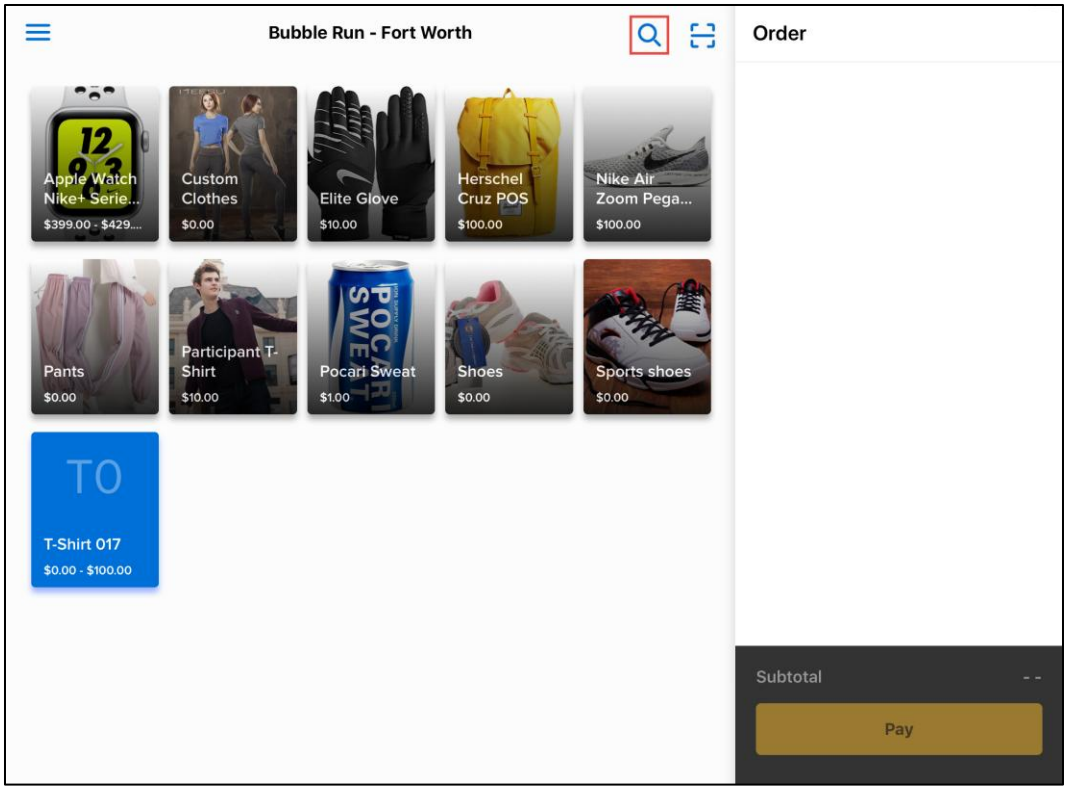
- On the left: a search box and available items.
- On the right: the current order.

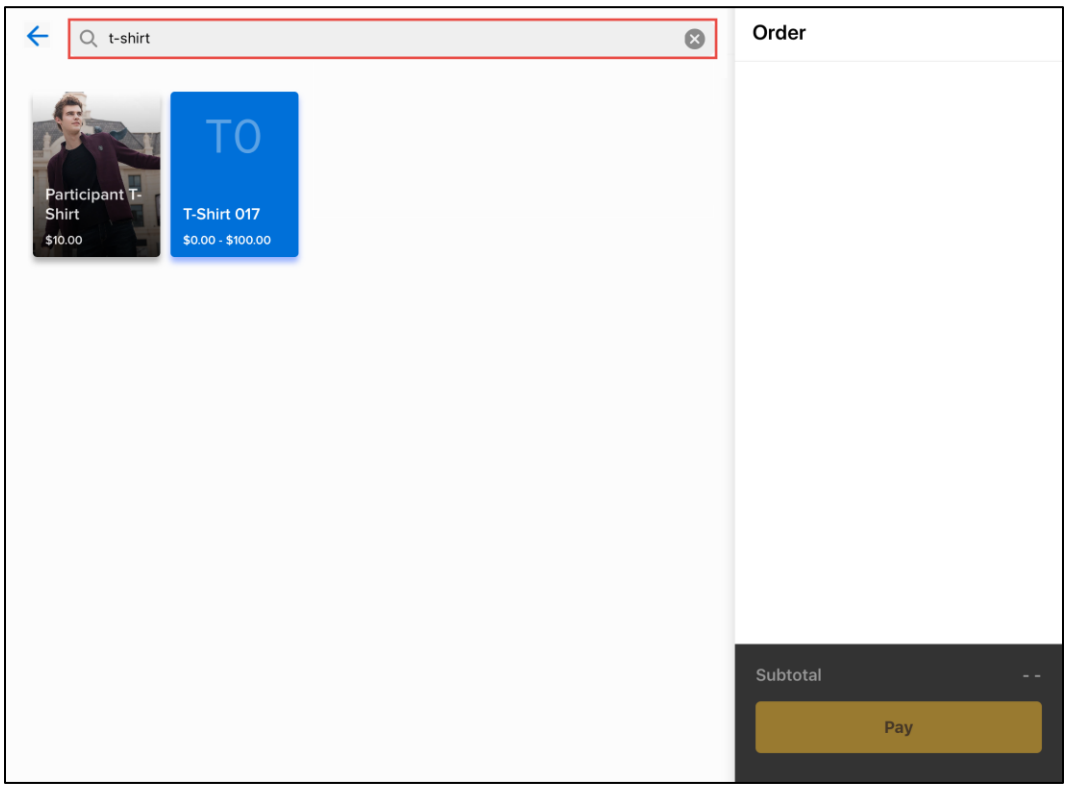


Searching for an item

To search for an item, tap the search icon (**Note**: this icon is hidden if there are no items available for sale) and then enter the item name or product ID in the search box. Matching items are displayed.

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After the search, click the back arrow icon ( ) to return to the main sales screen.

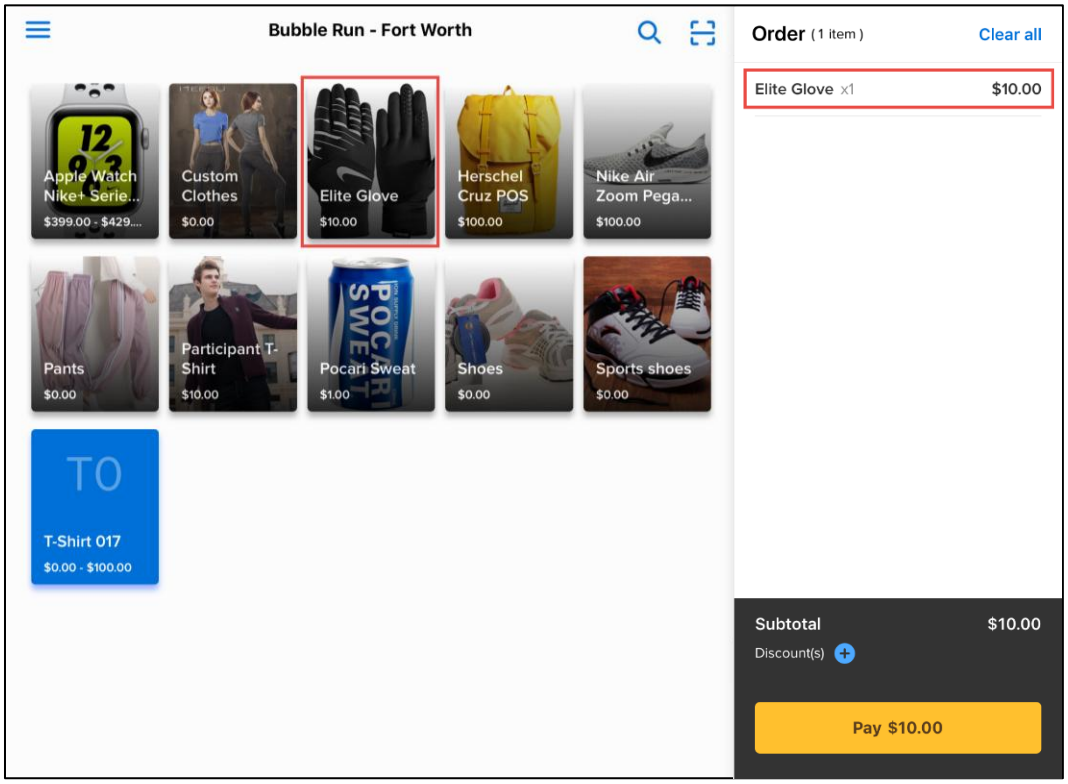
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Adding items from the sales screen

On the sales screen, you can add an item to the order by tapping the required item. Added items are listed under the **Order** list.

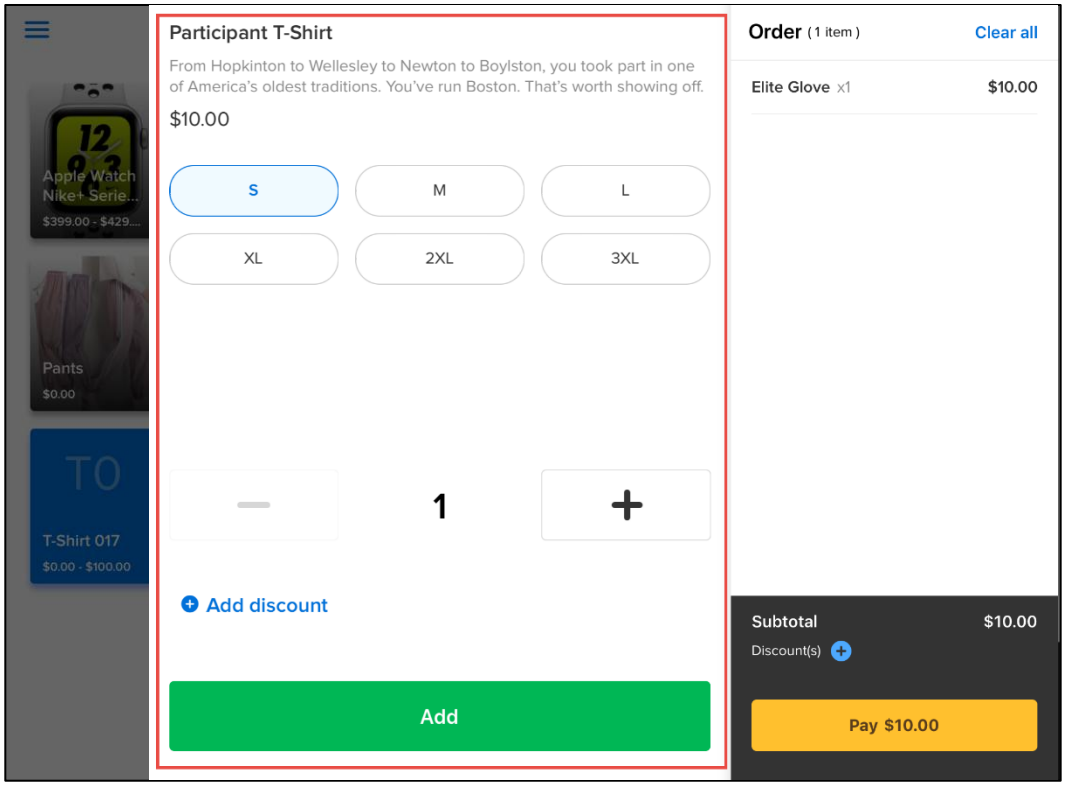
To add more of the same item, tap the item again.

Note: If the network is disconnected before adding more items to the order, then the ACTIVE POS automatically switches to offline mode (see Offline mode for more information).

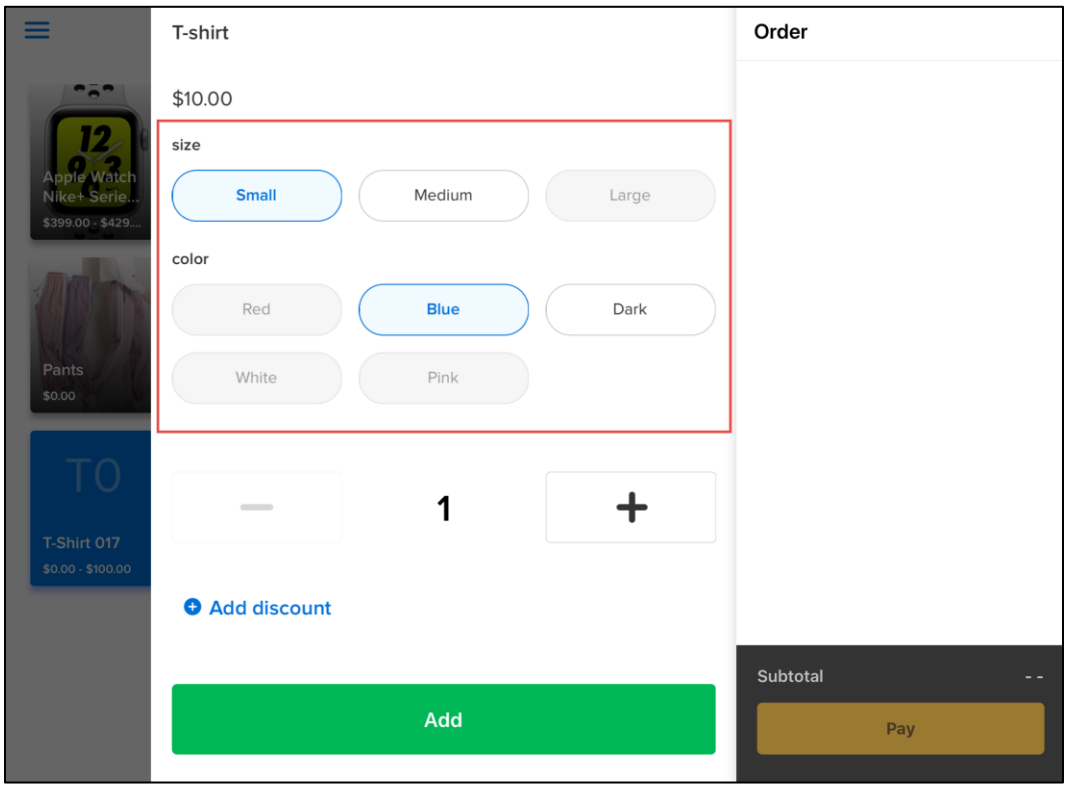


If an item has variations (for example, clothing sizes or colors), then tapping the item opens the item variation screen.

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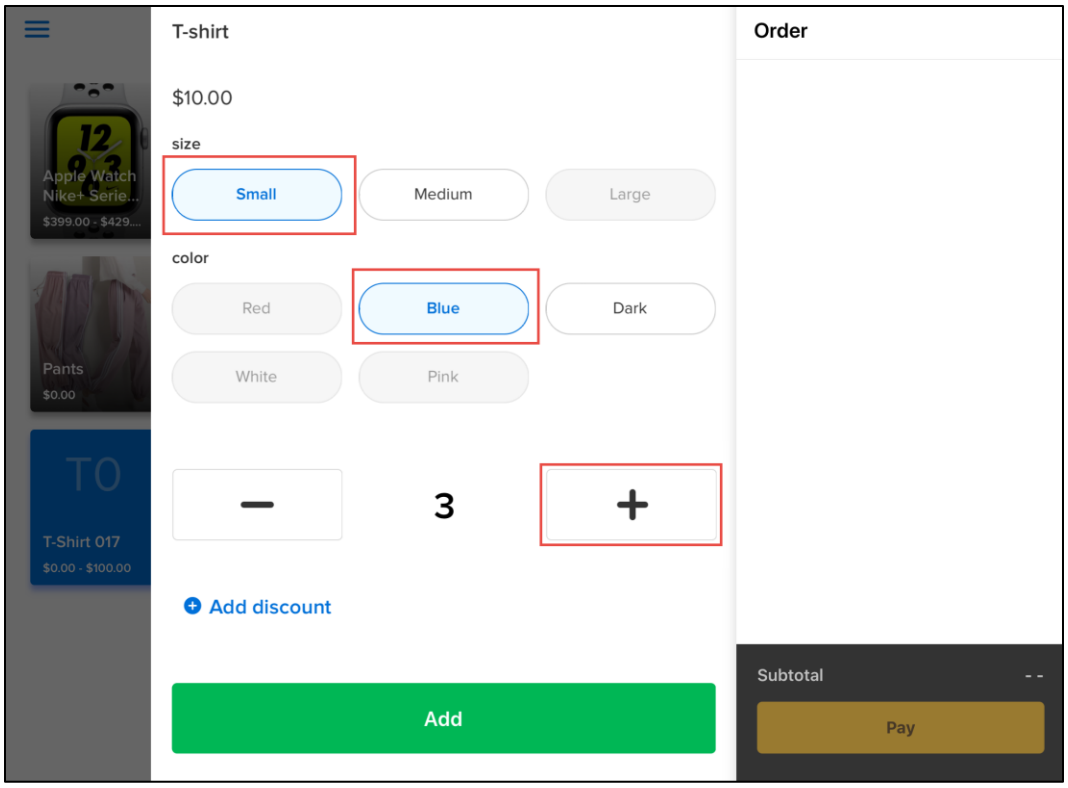


If there are variations of an item in different categories or tiers (e.g. size AND color), then the variations are listed separately under each category, for example:



DC2 - Restricted

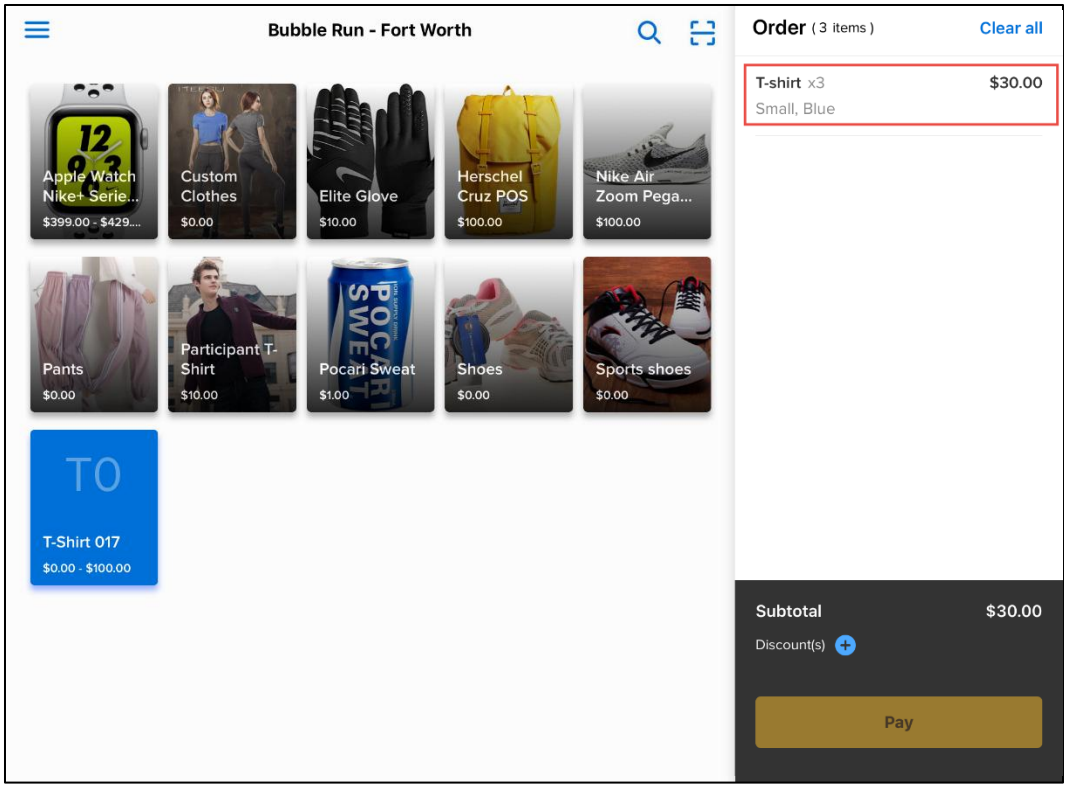
Tap the required variation and tap **+** or **–** to change the item quantity.



On the item variation screen, you can apply an ad-hoc discount to the item by tapping **+ Add discount**. However, if the customer has coupons, then we recommend you apply the coupon to the order BEFORE adding any item-level discounts. See Applying coupons and discounts for more information.

Then tap **Add** to add the item to the order.

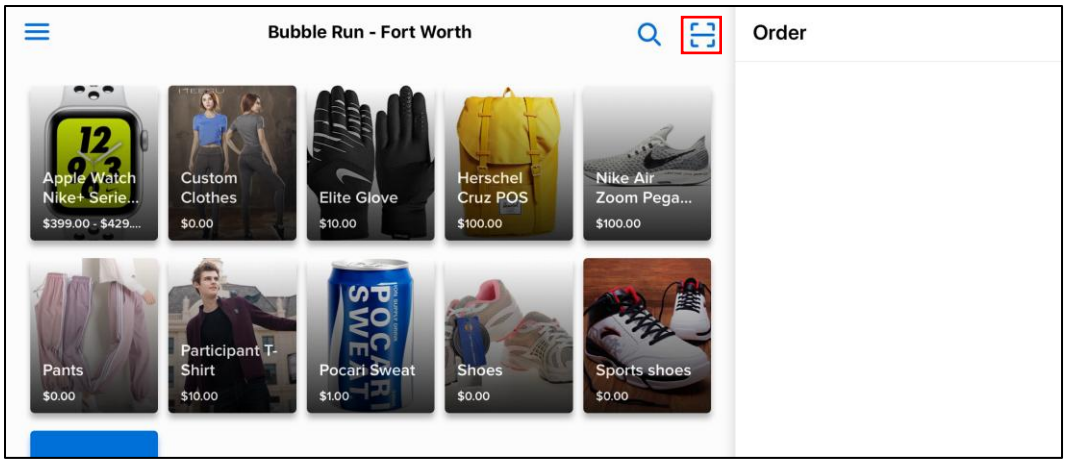
DC2 - Restricted



Adding items by scanning item barcodes

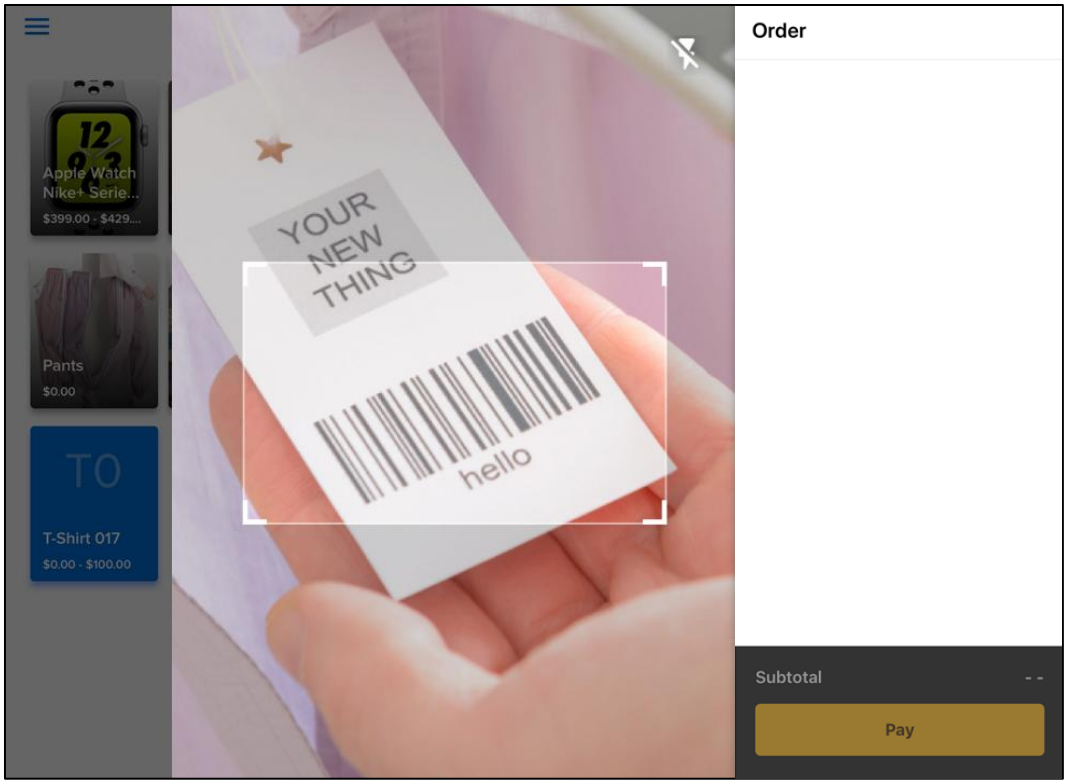
Items displayed on the sales screen can also be added to the order by scanning the barcode on the item (provided the item has been configured with a barcode):

1. Tap the scan icon ( ) at the top of the screen.

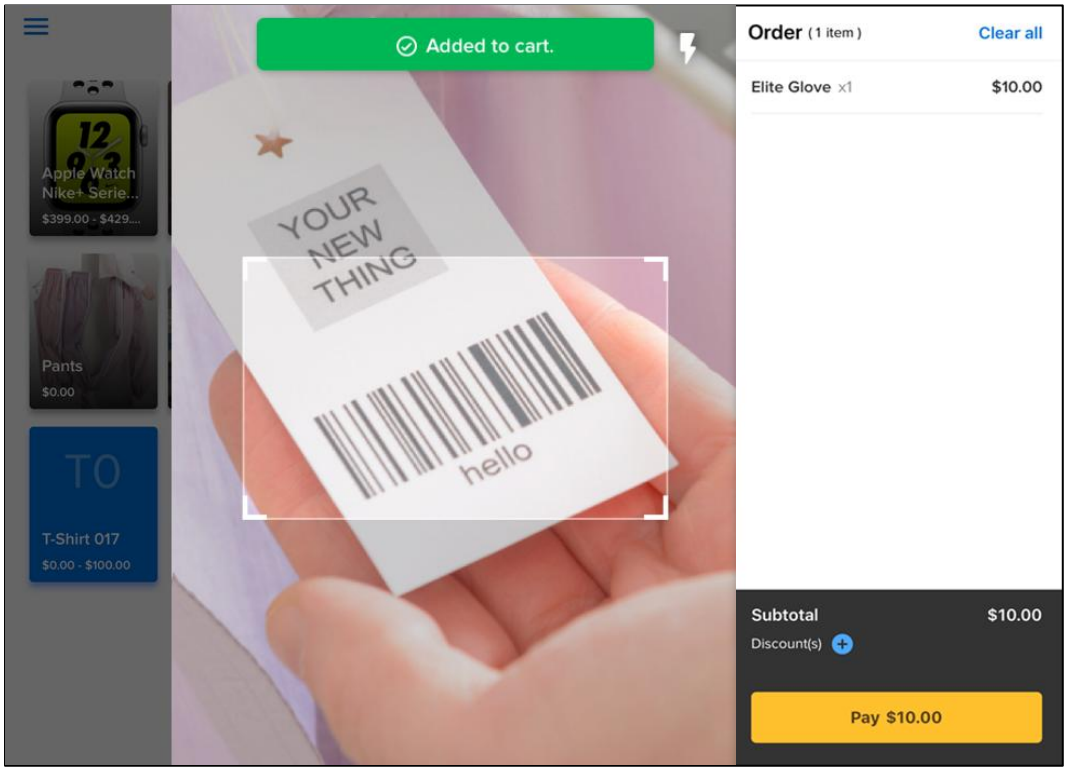


2. Point the mobile device's camera at the item's barcode until it is in focus in the viewfinder (**Note**: the POS app will ask for permission to access the camera if this permission has not been granted).

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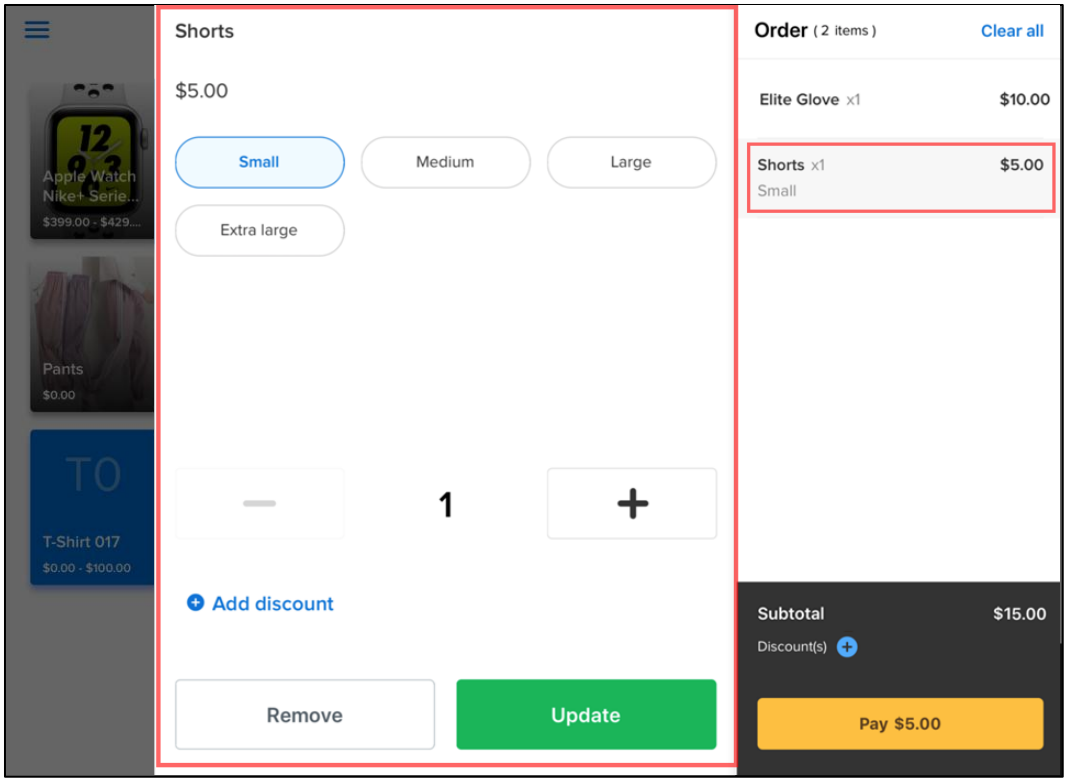


3. Once the barcode is scanned and recognized, the item is automatically added to the order.



4. If the added item has variations (for example, clothing sizes or colors) and the customer wishes to change to a different variation (for example, from size S to M), then tap the item in the order to open the item variation screen.

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5. To return to the main sales screen, tap anywhere outside of the scanner.

Applying coupons and discounts

ACTIVE POS supports order-level coupons (when the device is connected to the internet) and ad-hoc discounts (both order-level and item-level).

Rules and recommendations:

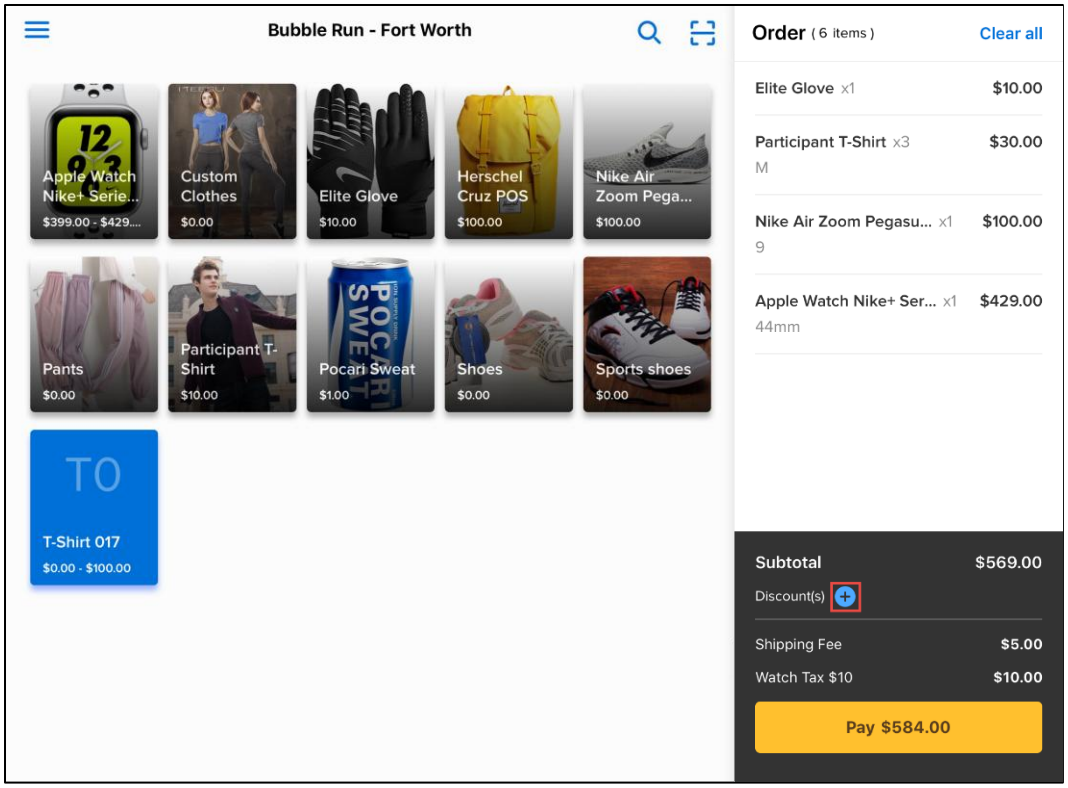
- A coupon code can be valid for one or more items in an order, depending on the organization's configuration.
- An item can be applied with only one of multiple coupon codes (if multiple codes work with an item, then only one of those codes can be applied in an order).
- Applying a coupon code will clear any previously-applied discounts (both item-level and order-level). If you wish to apply both coupons and ad-hoc discounts, then apply coupon codes before any discounts.
- For each item, a maximum of one coupon, one order-level discount and one item-level discount can be applied together.
- If all items in an order are free, then coupon and discount options are NOT displayed.
- Coupons are NOT supported in offline mode (see Offline mode for more information).

Applying order-level coupons or discount

To apply coupons or a percentage discount to the entire order:

1. Under **Order** > **Subtotal**, next to **Discount(s)**, tap ⊕.

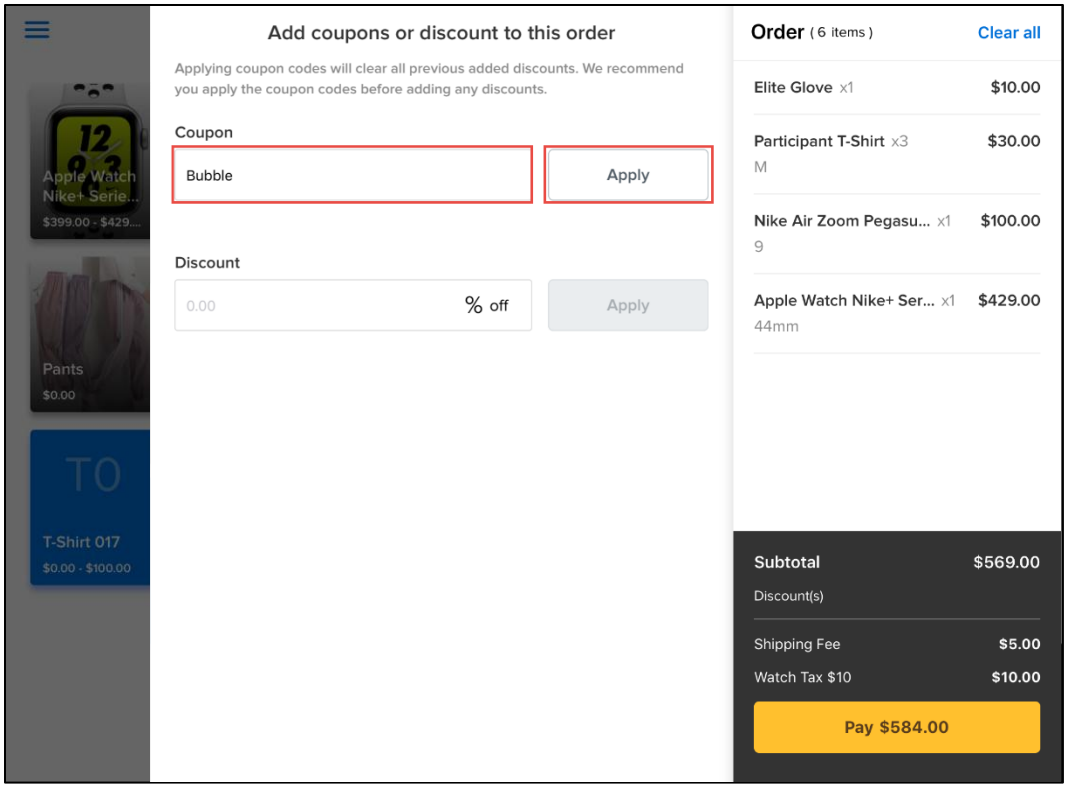
DC2 - Restricted

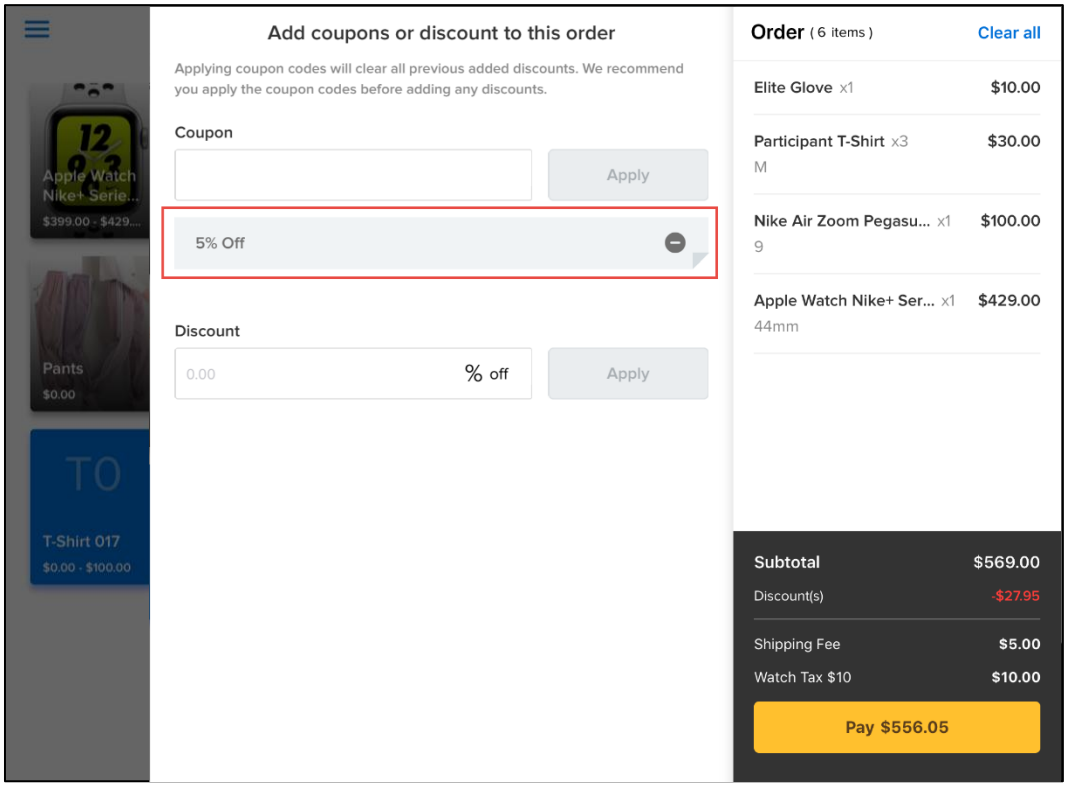


2. If the customer presents a coupon code, then under **Coupon**, enter the coupon code and then tap **Apply**.

   Note: In offline mode (see Offline mode for more information), the **Coupon** option is disabled. The discounts for any previously-applied coupons in the current order are converted to ad-hoc discounts and the coupons are removed.

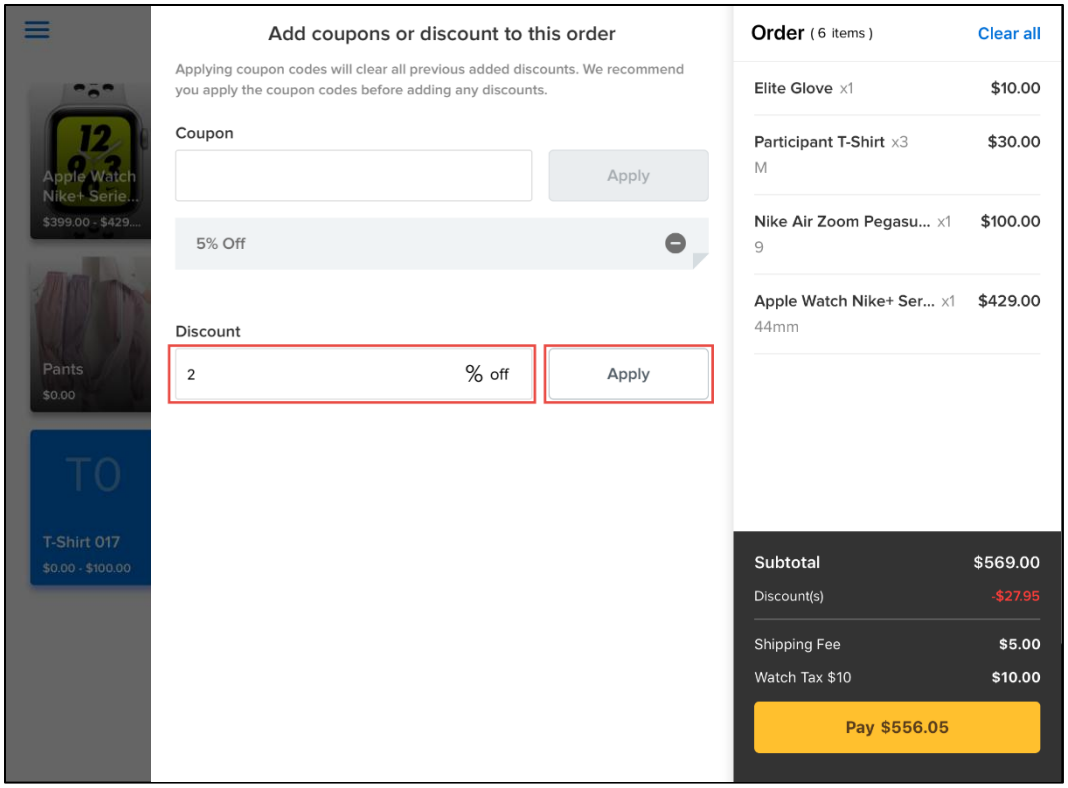
DC2 - Restricted





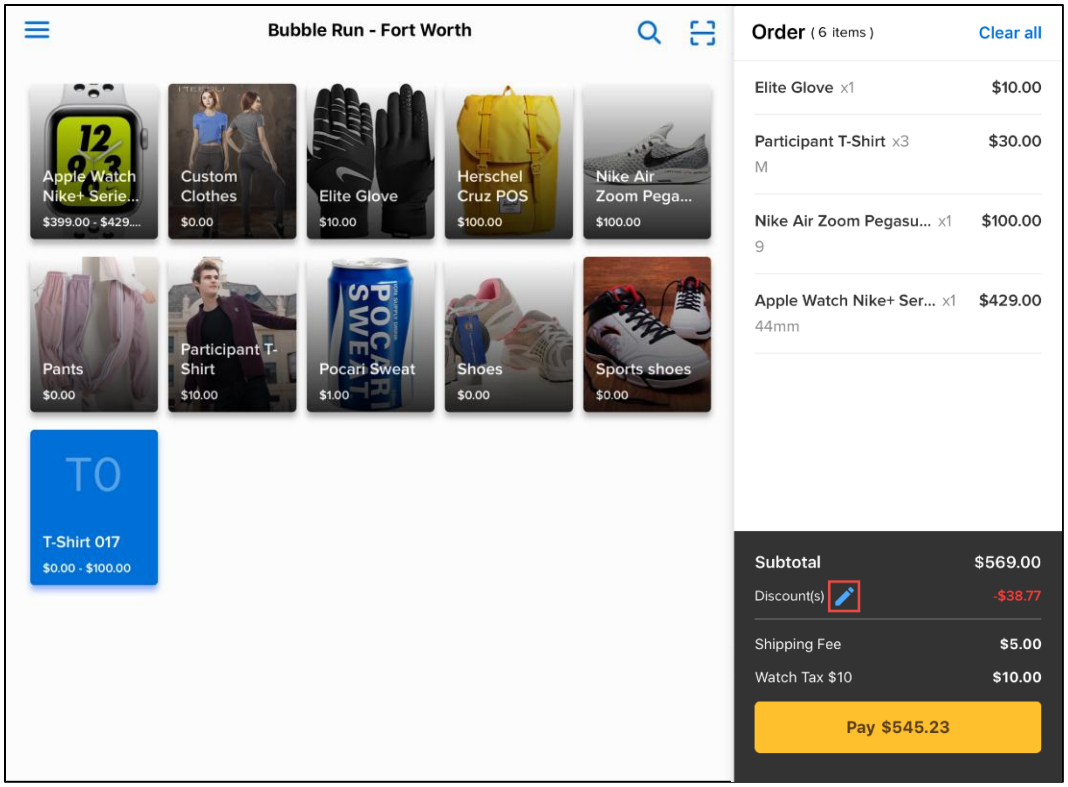
3. If the customer has more coupon codes, then enter the next coupon code and tap **Apply**.
4. To apply a percentage discount to the entire order, under **Discount**, enter the required percentage and then tap **Apply**.

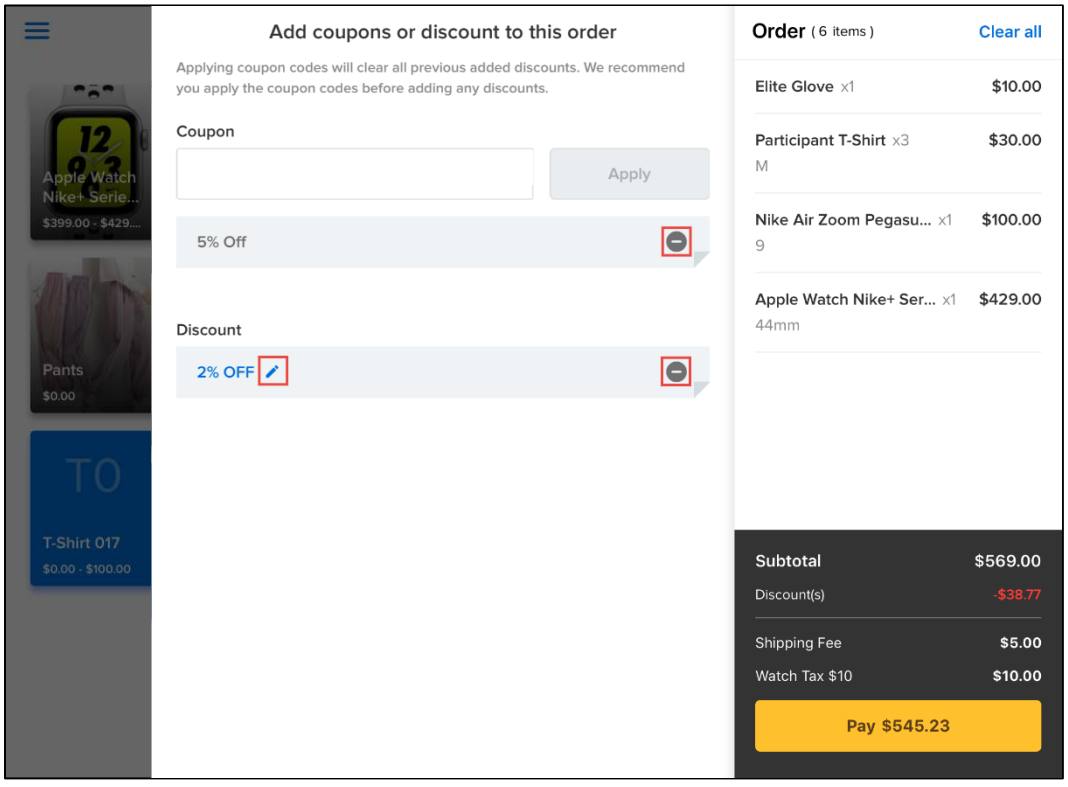
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5. Tap anywhere on the screen to close the order-level coupons and discount screen.
6. To edit or remove the applied coupons or discount, next to **Discount(s)**, tap , then:
   - Tap to edit the order-level discount.
   - Tap to remove the order-level coupon or discount.

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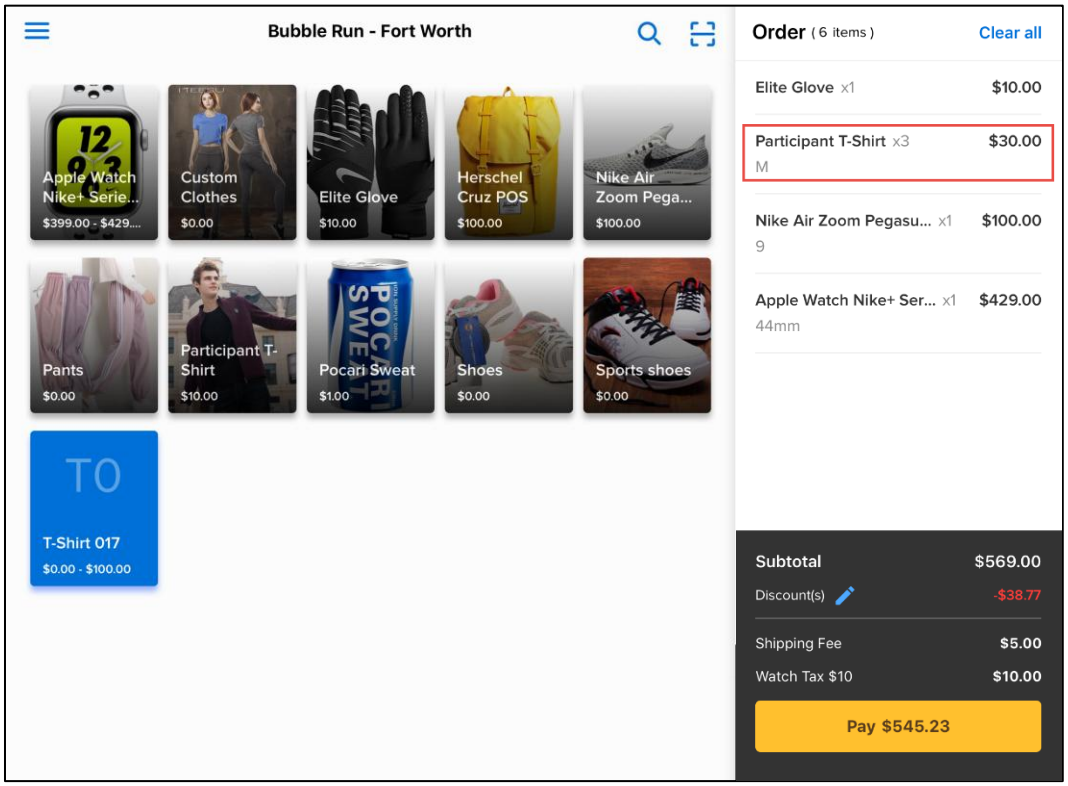


Applying an item-level discount

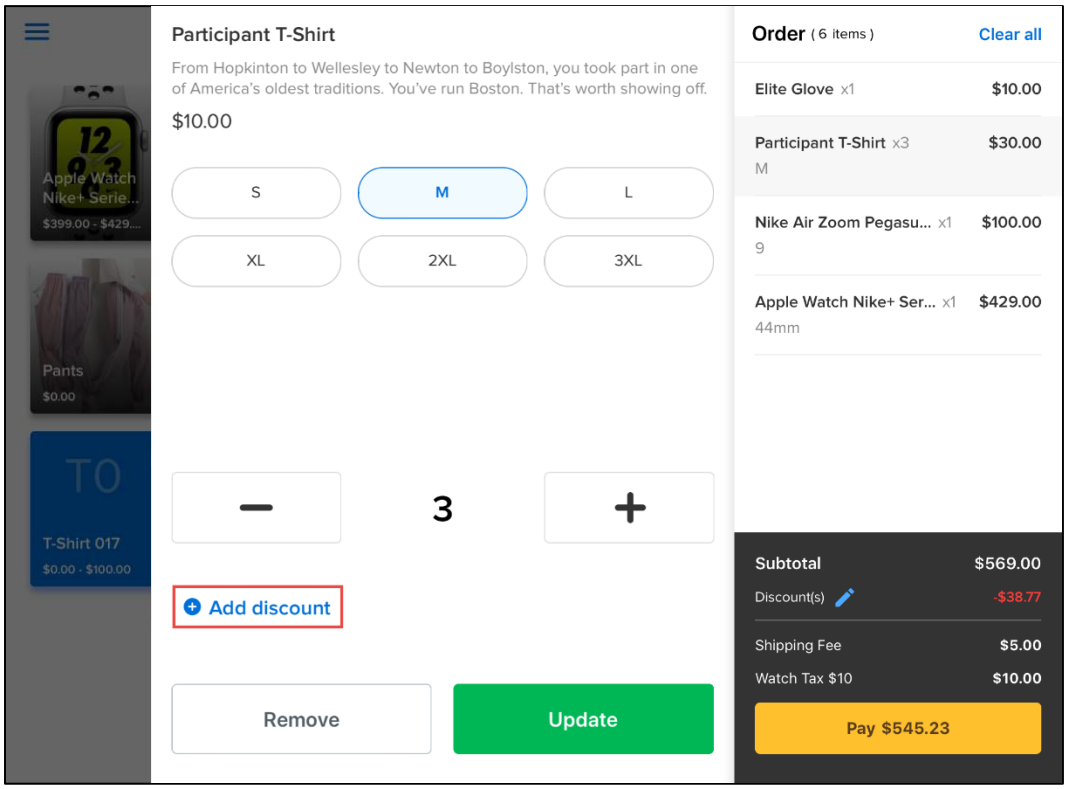
To apply an ad-hoc discount to an individual item:

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1. Under **Order**, tap the required item.

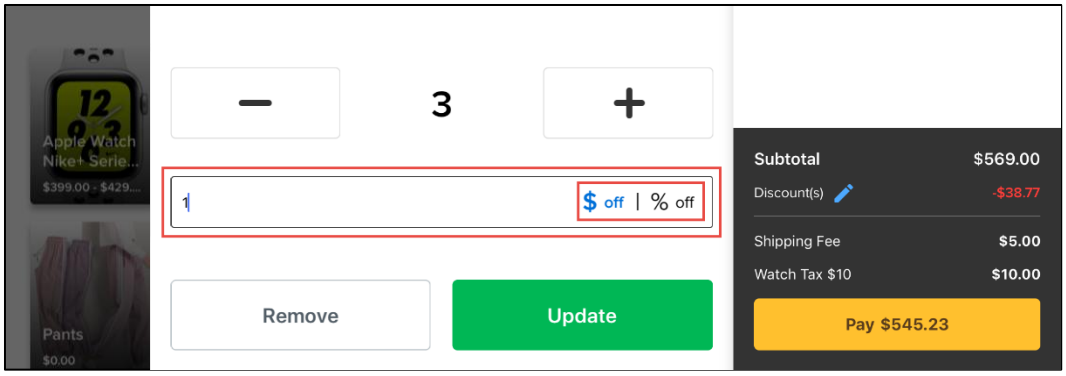


2. Tap **+ Add discount**.

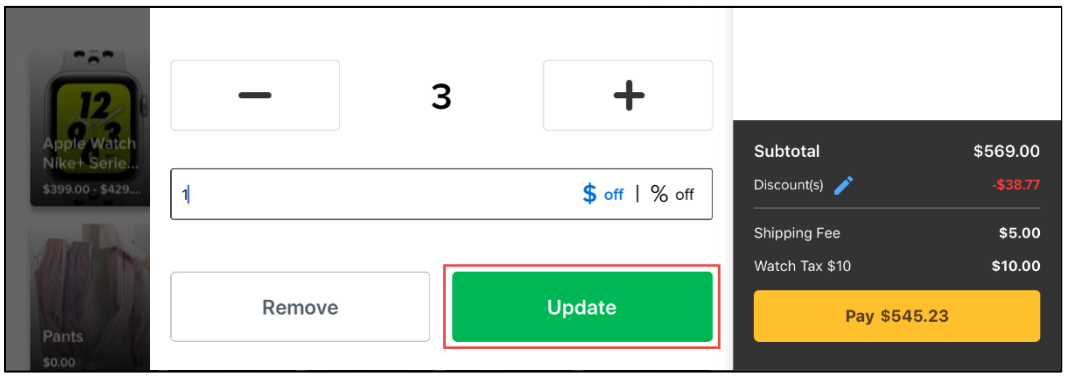


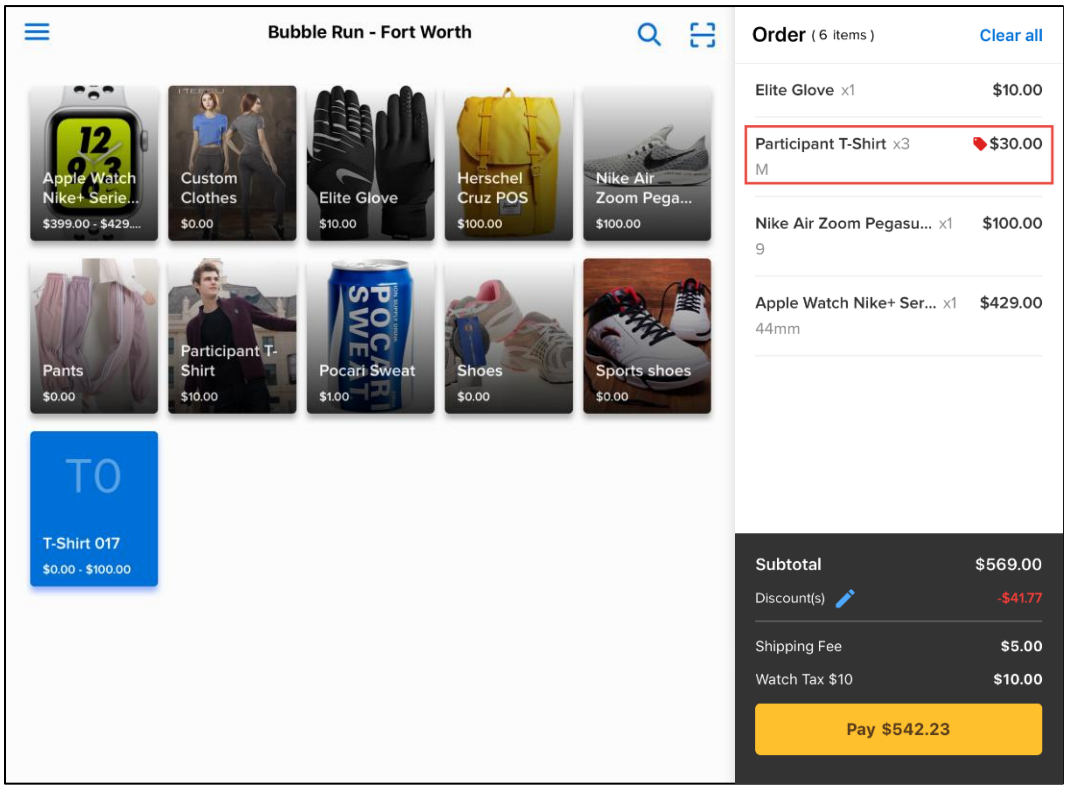
3. Enter the ad-hoc discount amount and then tap **$ off** (for a fixed-amount discount) or **% off** (for a percentage discount) on the item, for example: $1 off the item.

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4. Tap **Update**. A discount icon ( ) appears next to the item in the **Order**.



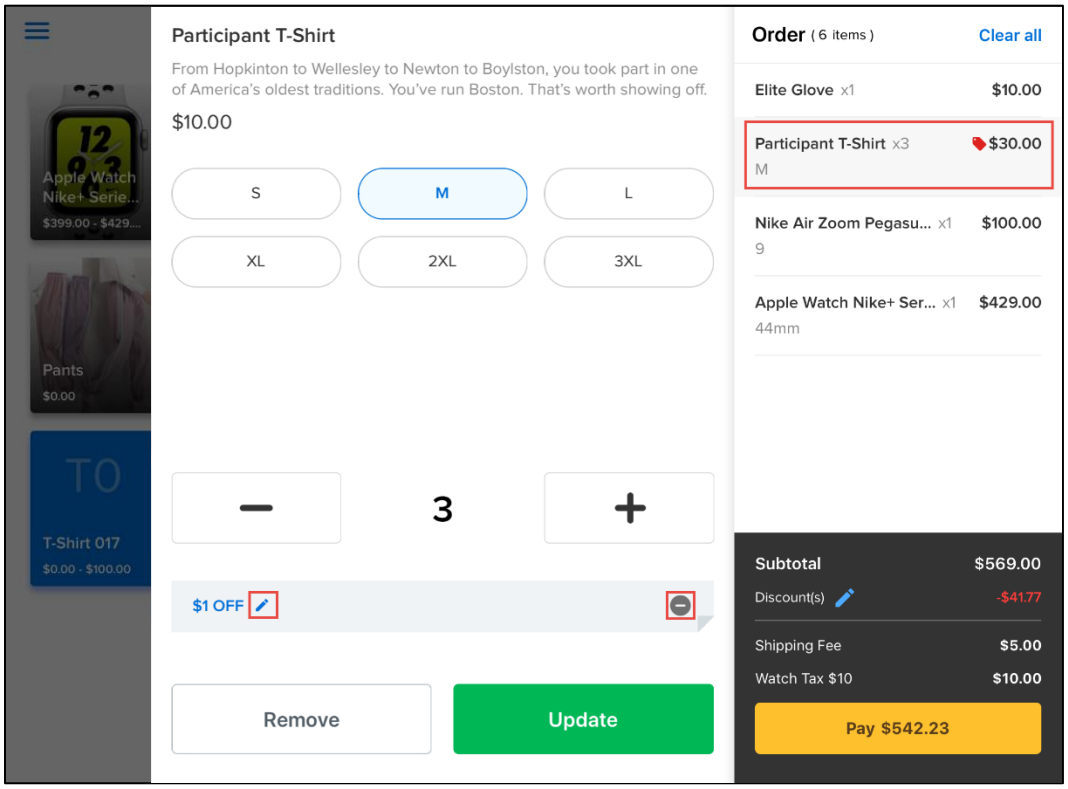


Note:

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- The item-level discount is applied to each instance of an item. In this example, there are three Participant T-shirts to which a $1 item-level discount has been applied. The total discount is thus: 3 x $1 = $3.

5. To edit or remove an item-level ad-hoc discount, under **Order**, tap the item, then tap  to edit or  to remove the discount.

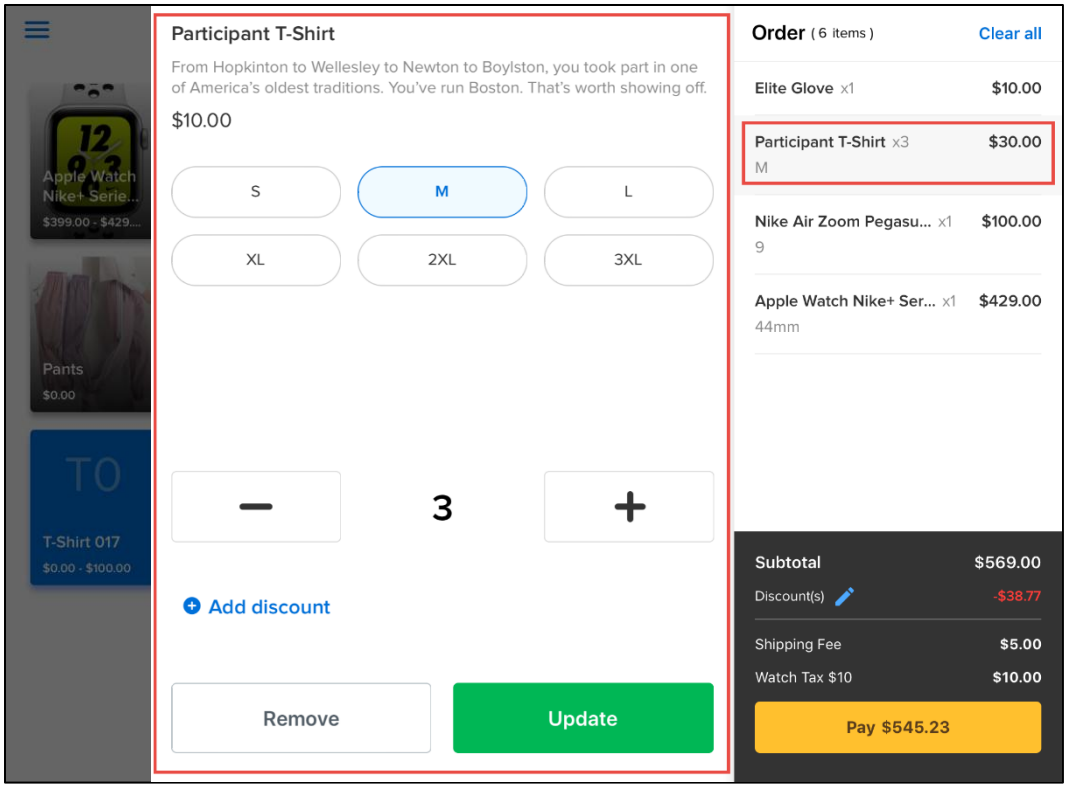


Editing an item in the current order

After an item is added to the order, you can edit the item quantity or variation (if applicable):

1. Under **Order**, tap the required item to open the item detail screen.

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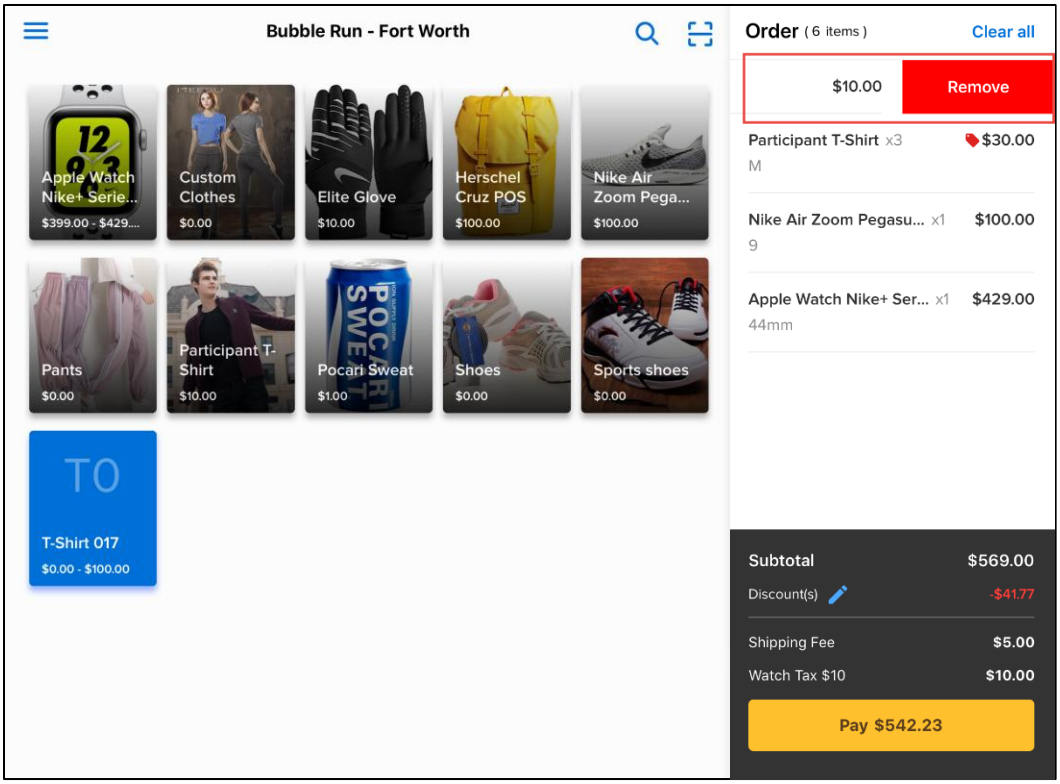
2. To change item quantity, tap **+** or **–**, or tap the number to manually enter the required quantity. For an item with no variations, tapping the item on the sales screen also increases the quantity by one per tap.
3. To change the item variation (if applicable), tap the required variation.
4. Tap **Update**.

Removing items from the current order

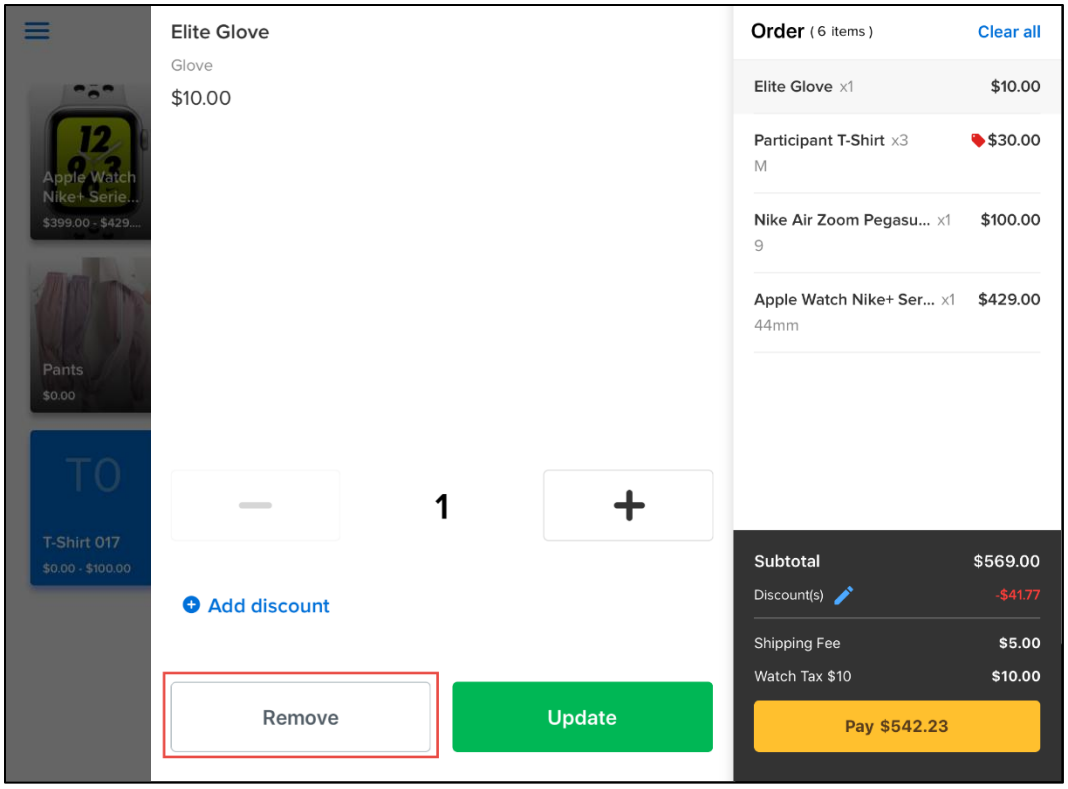
You can remove an item from the current order by one of the following:

- Under **Order**, swipe the required item to the left and then tap **Remove**.

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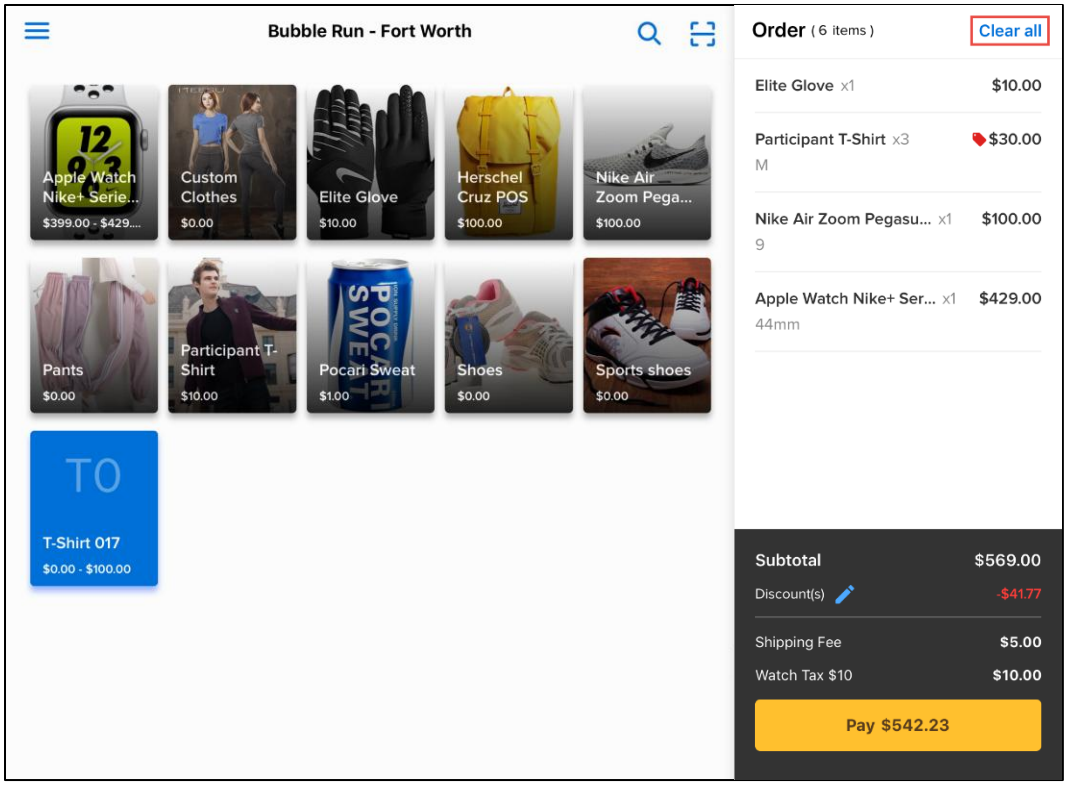


- Under **Order**, tap the required item to open the item detail screen and then tap **Remove**.



You can remove all items in the current order by tapping **Clear all** on the top-right.

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Checking out

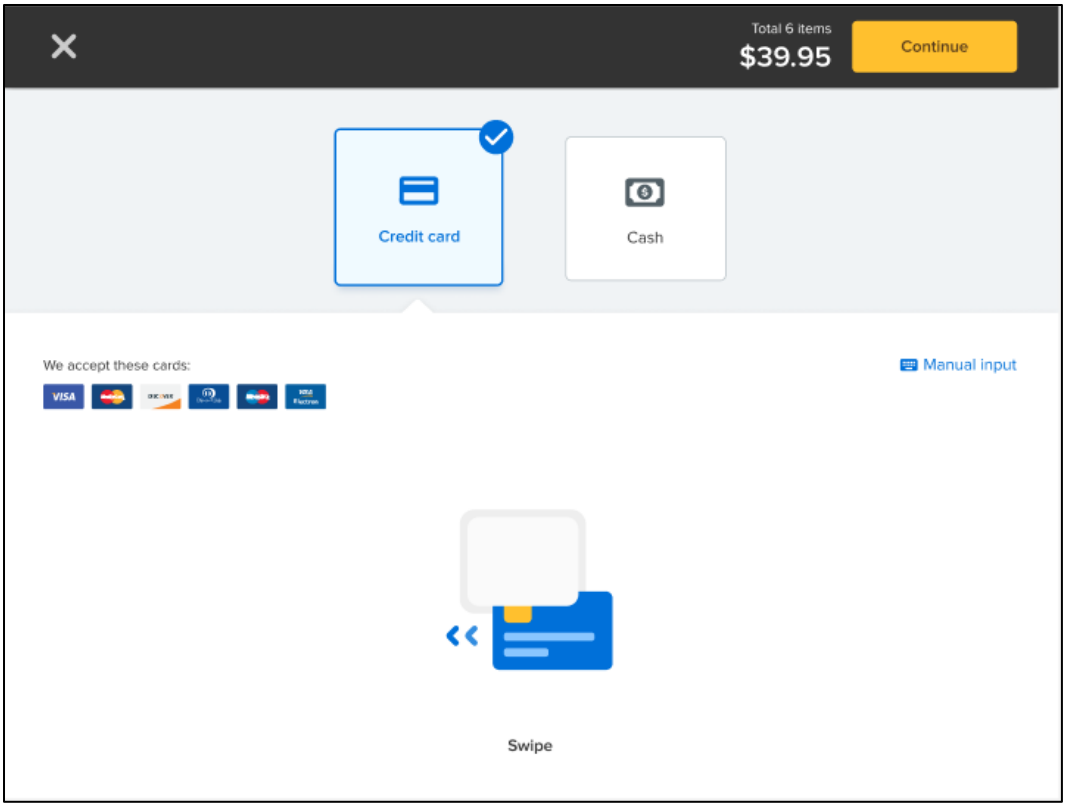
To check out, tap **Pay** to open the payment screen. ACTIVE POS supports both credit card and cash payments.

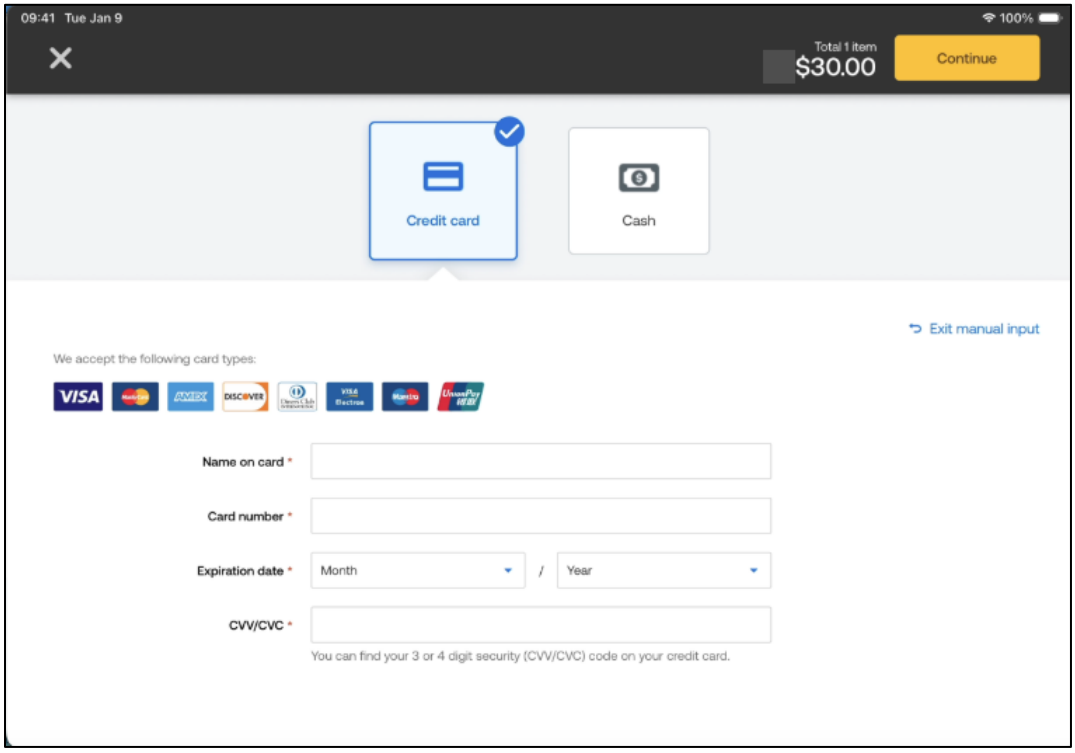
Paying by credit cards (online)

To process credit card payments when the network is connected:

1. Tap **Credit card** (selected by default) and provide card information by:
   - Swipe the card (magnetic-stripe card only) through the connected MagTek card reader.
   - Manually entering the card information.

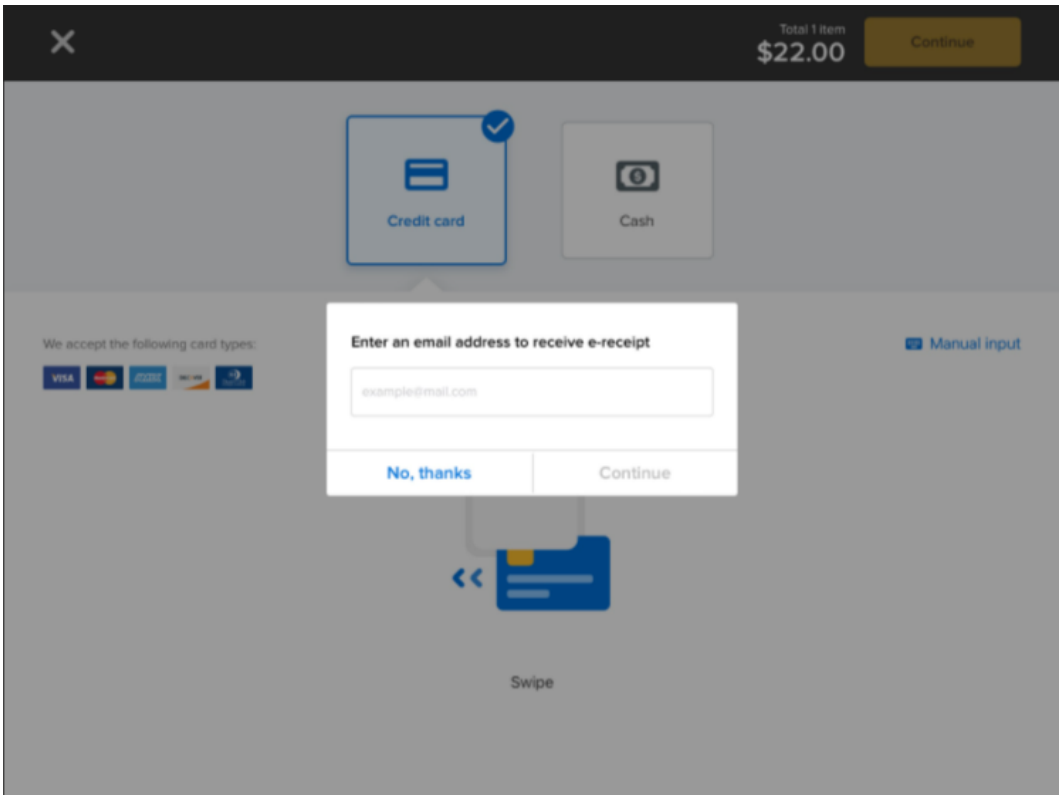
DC2 - Restricted



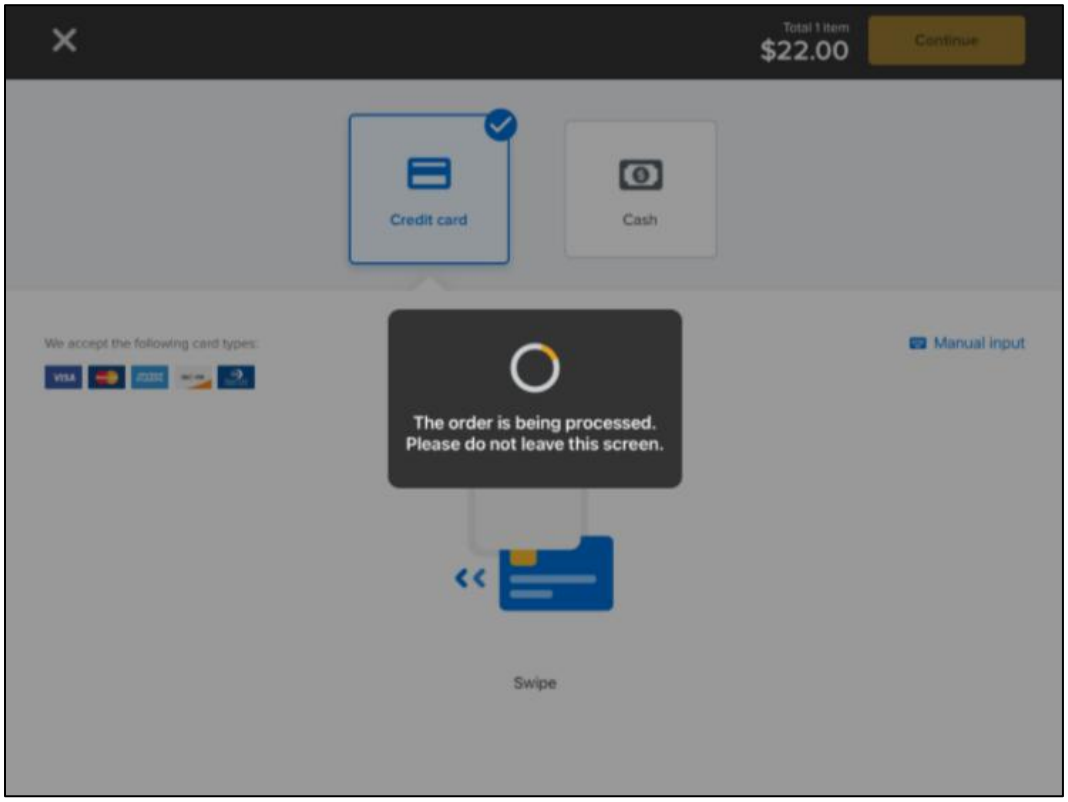


2. To email a copy of the receipt to the customer, enter their **Email** address.

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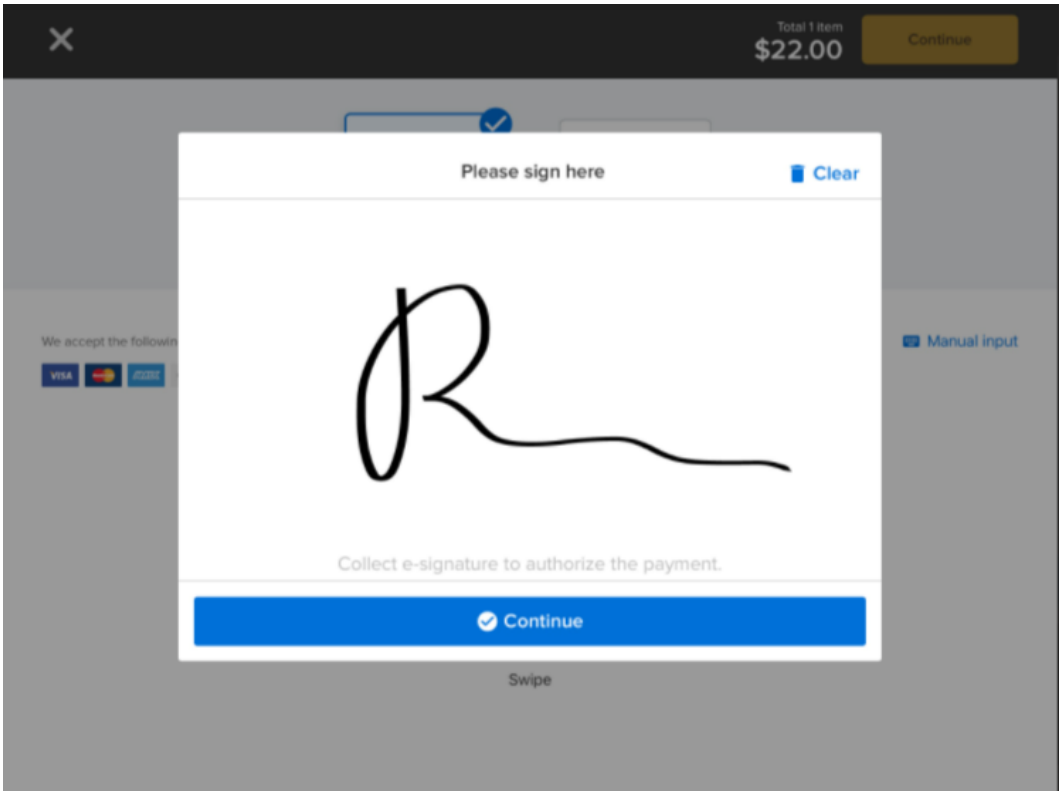


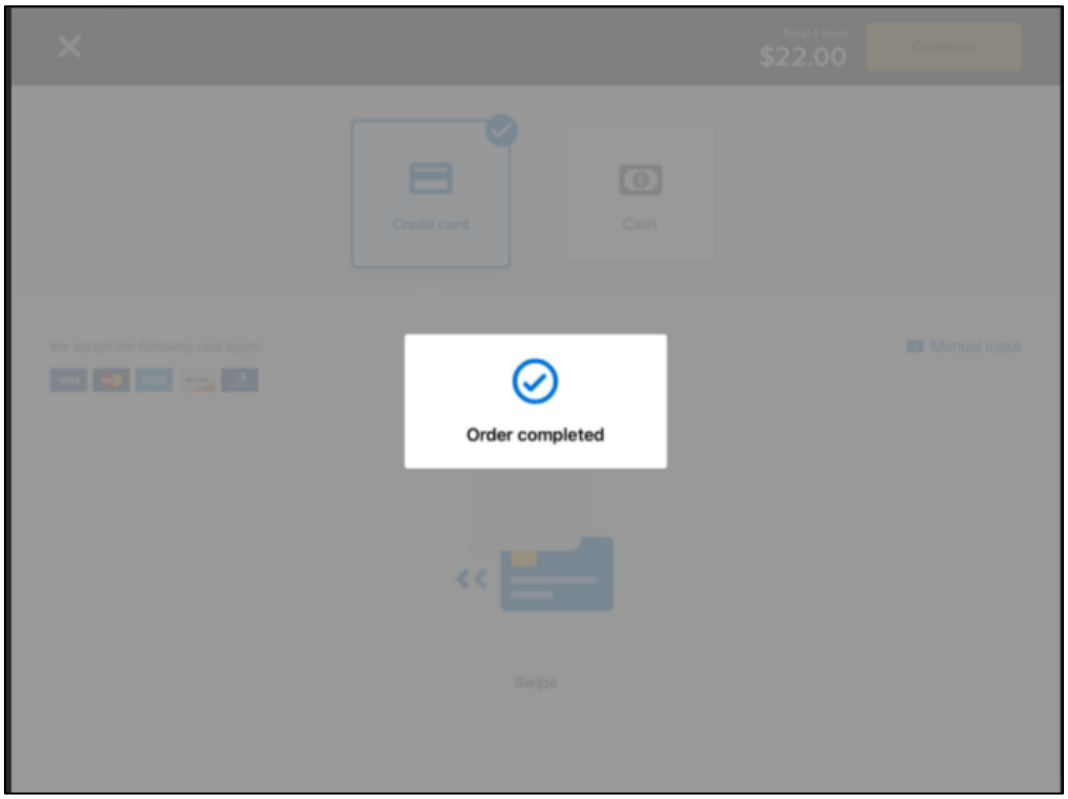
3. Tap **Continue**.



4. On the **Please sign here** popup, request the customer to sign their signature to authorize the payment, then tap **Continue** to complete the order.

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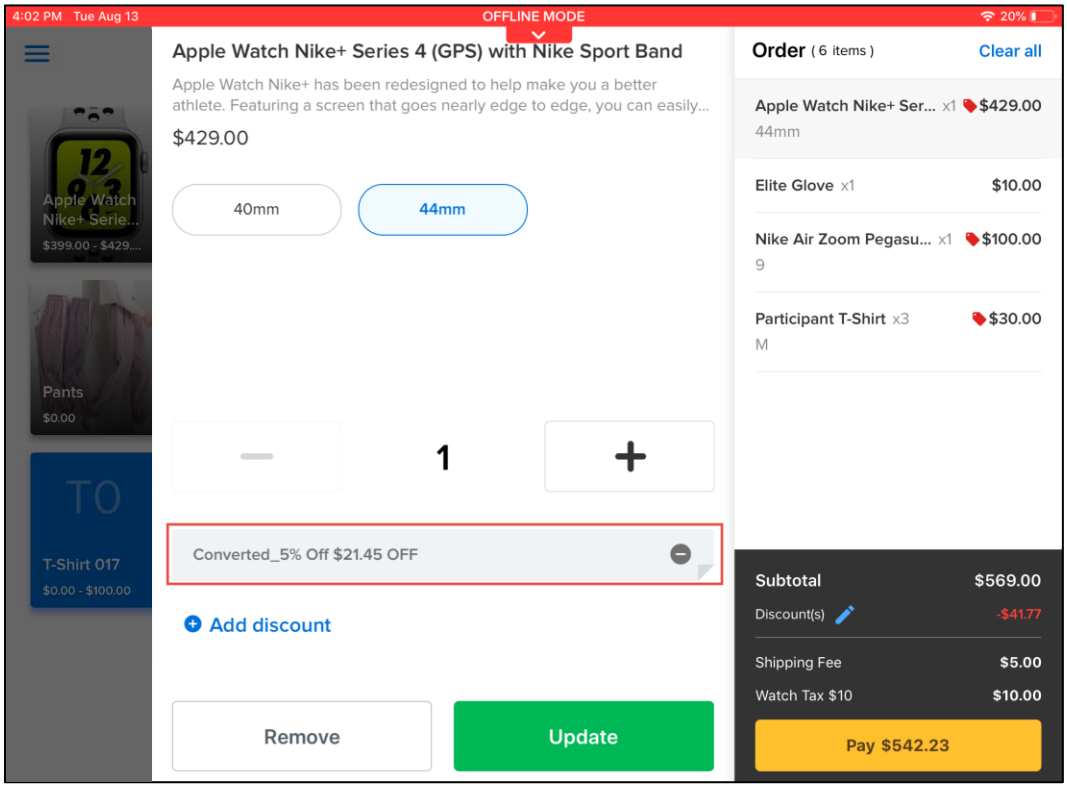




DC2 - Restricted

Paying by credit cards (offline)

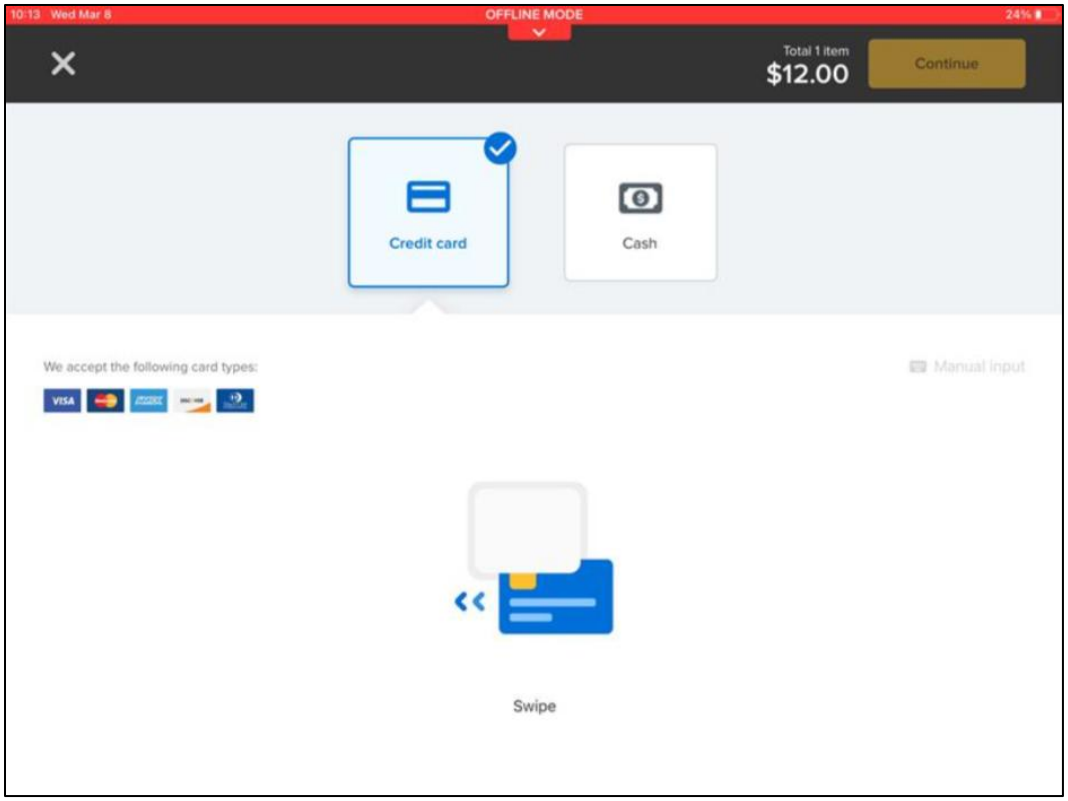
If the network is disconnected before checking out, then the discounts for any previously-applied coupons are converted to ad-hoc discounts and the coupons are removed. For example:



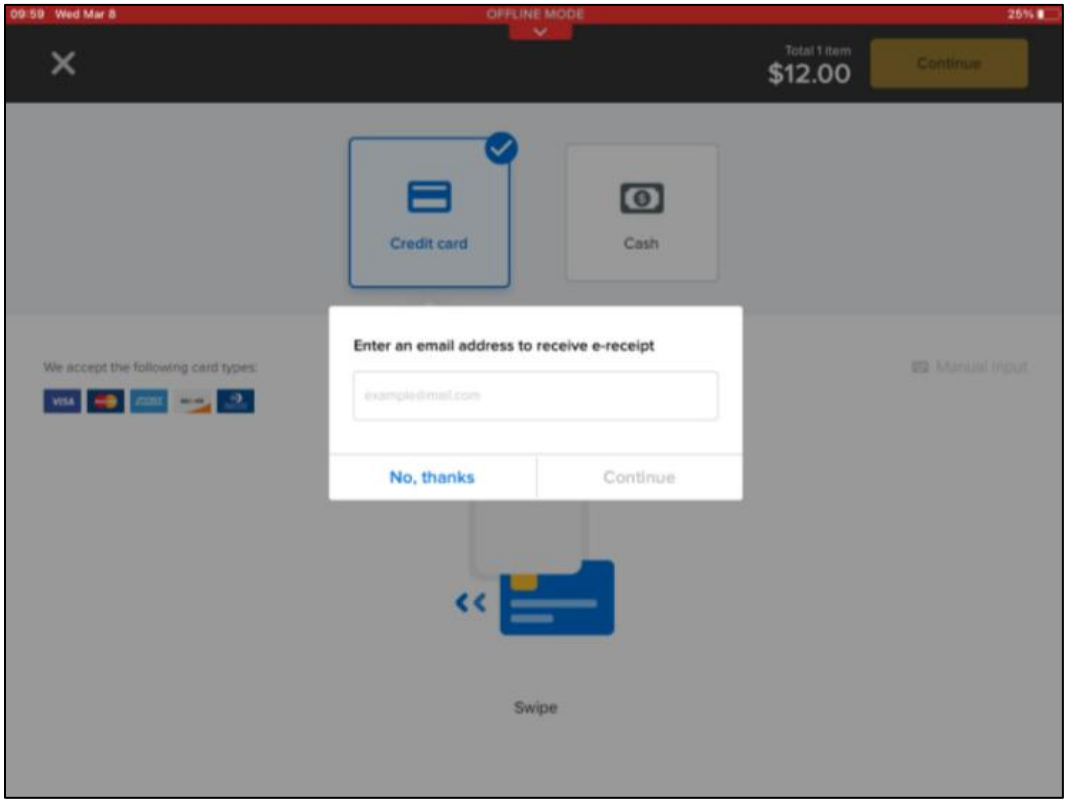
To process credit card payments while offline (only swiped card payments are accepted, see Offline mode for more information):

1. Tap **Credit card** (selected by default) and swipe the card through the connected MagTek card reader.
   - In offline mode, manual card information entry is disabled.
   - Verify the cardholder's name and the card expiration date before swiping the card.

DC2 - Restricted

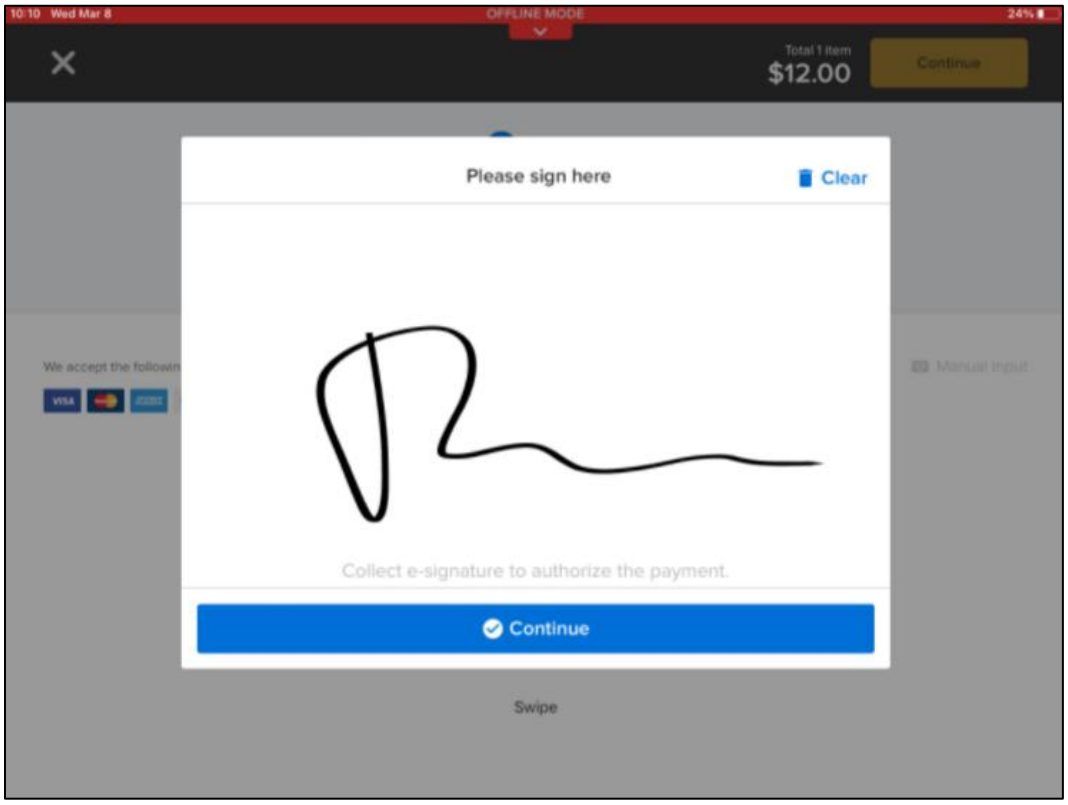


2. To email a copy of the receipt to the customer, enter their **Email** address in the popup and then tap **Continue**. Otherwise tap **No, thanks**.

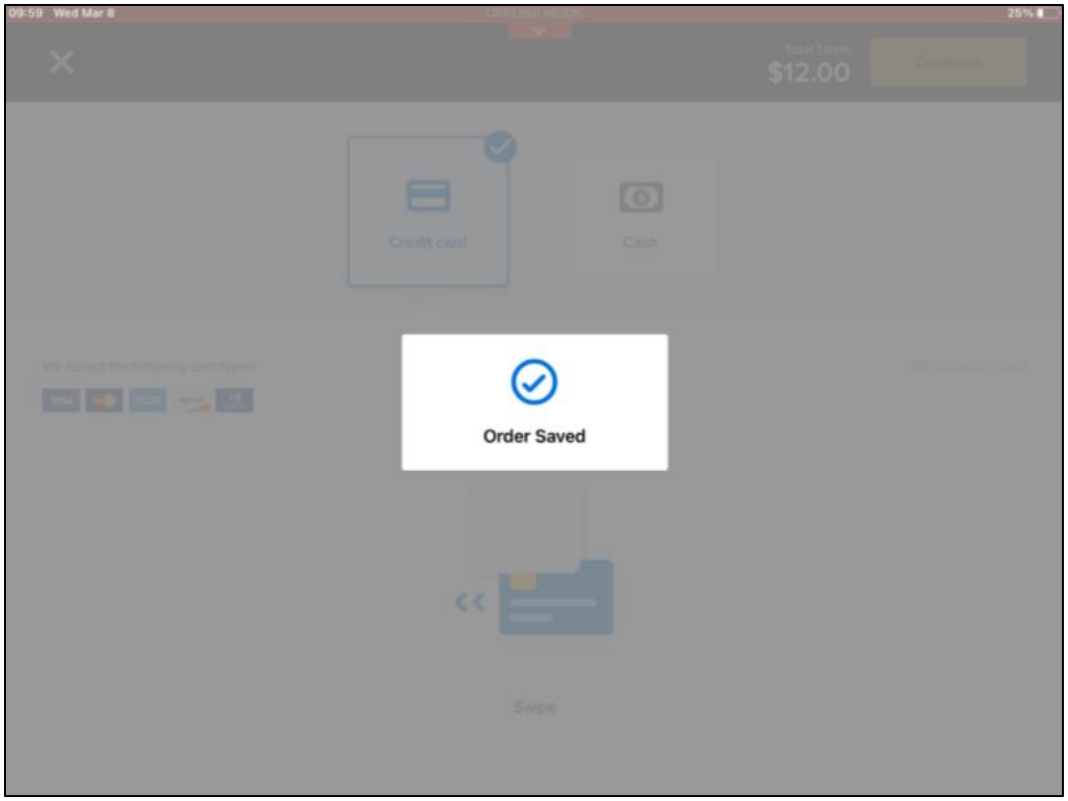


DC2 - Restricted

3. On the **Please sign here** popup, request the customer to sign their signature to authorize the payment, then tap **Continue** to save the order. When the mobile POS device reconnects to the network, the order will be submitted for processing.



DC2 - Restricted

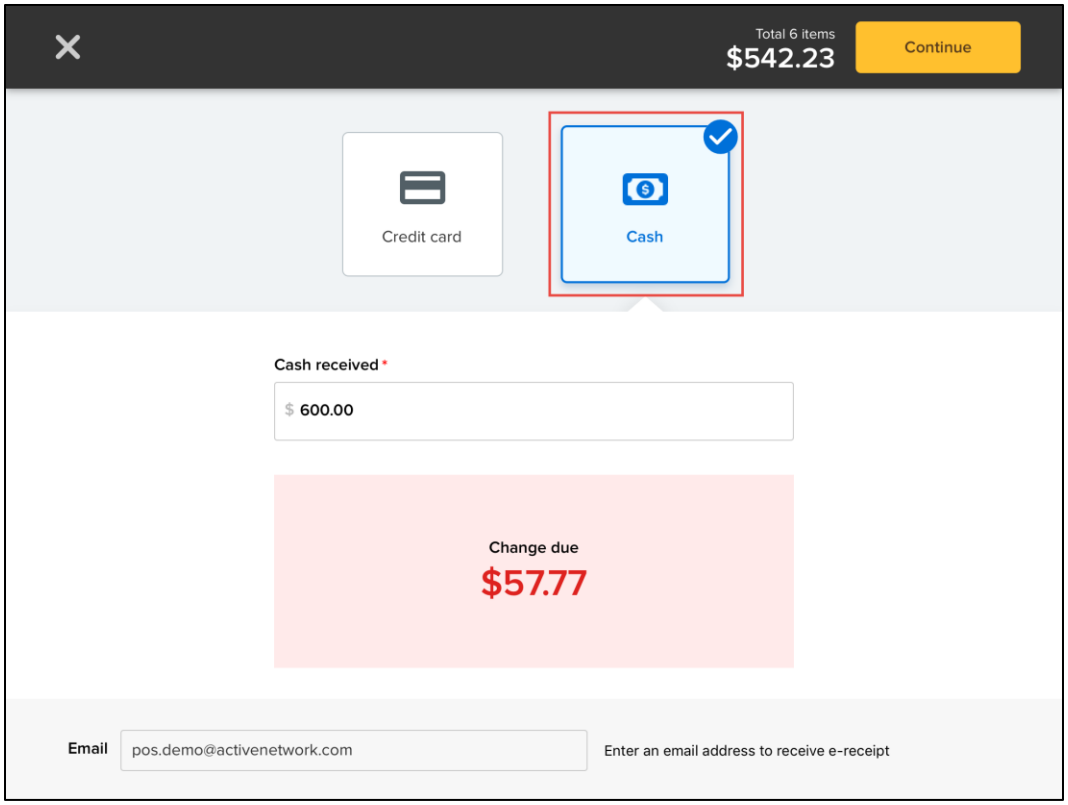


Paying by cash

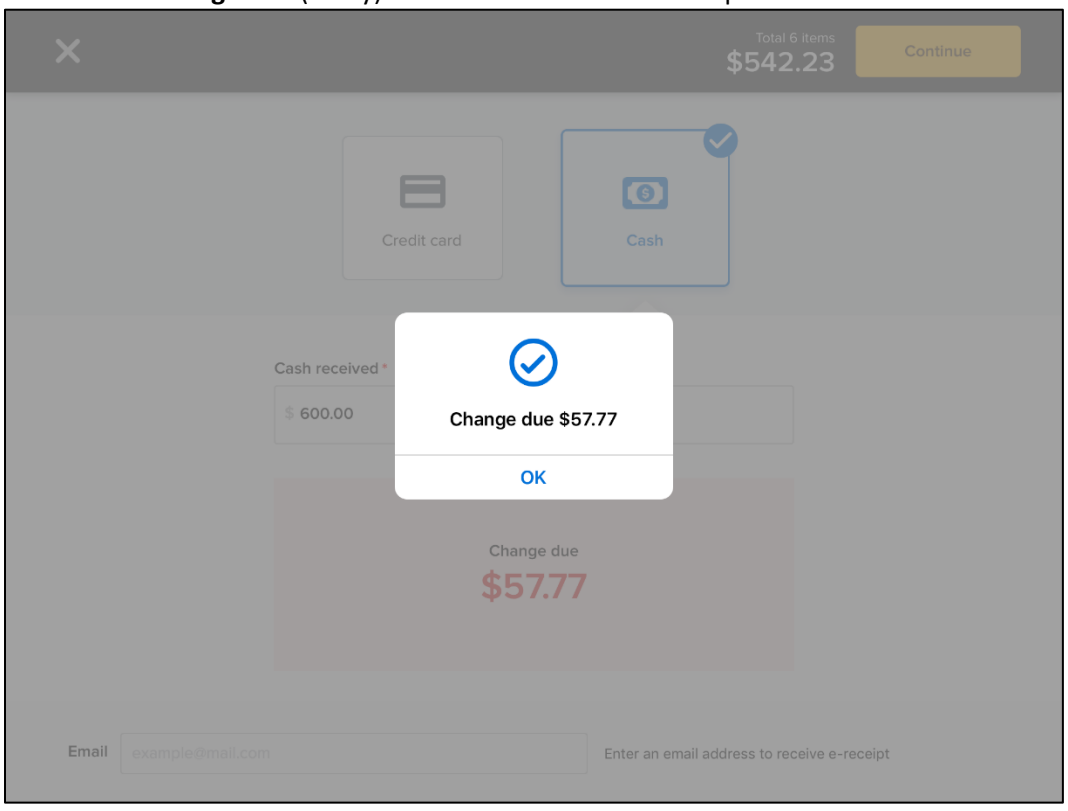
To process cash payments, on the payment screen:

1. Tap **Cash** and enter the cash amount received from customer.

DC2 - Restricted



2. To email a copy of the receipt to the customer, enter their **Email** address.
3. Tap **Continue**.
4. Provide the **Change due** (if any) to the customer and then tap **OK**.



DC2 - Restricted

EMV chip and contactless card payments

In addition to swiped magnetic-stripe cards, ACTIVE POS supports EMV card payments, allowing customers to pay by inserting a chip card (**Insert**) or tapping a contactless card (**Tap**) on a supported MagTek card reader.

Note: EMV payments are NOT enabled by default. To accept chip and contactless cards, contact ACTIVE Support (support.activenetwork.com/endurance or clientcare@activenetwork.com) to enable EMV for your agency. Until EMV is enabled, only swiped card payments and manual card entry are accepted.

EMV requirements

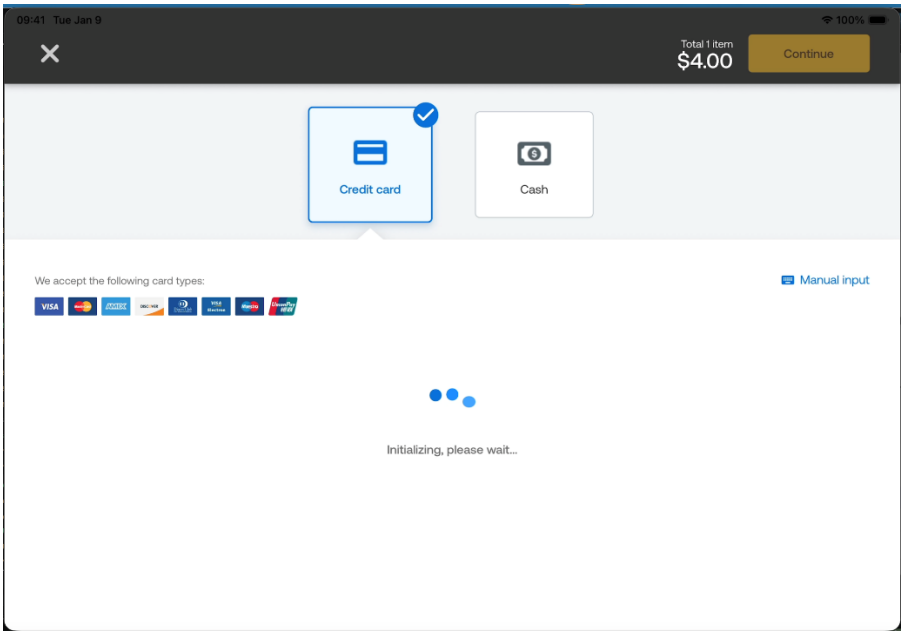
To accept EMV payments, the following conditions must be met:

- EMV has been enabled for your agency by ACTIVE Support.
- The mobile POS device is connected to the internet (EMV payments are NOT accepted in offline mode; see Accepting EMV payments in offline mode).
- One of the following EMV-capable card readers is connected:
    - MagTek tDynamo Bluetooth Secure Card Reader
    - MagTek iDynamo 6 Lightning Secure Card Reader
    - MagTek iDynamo 6 USB-C Secure Card Reader

Paying by chip or contactless card (online)

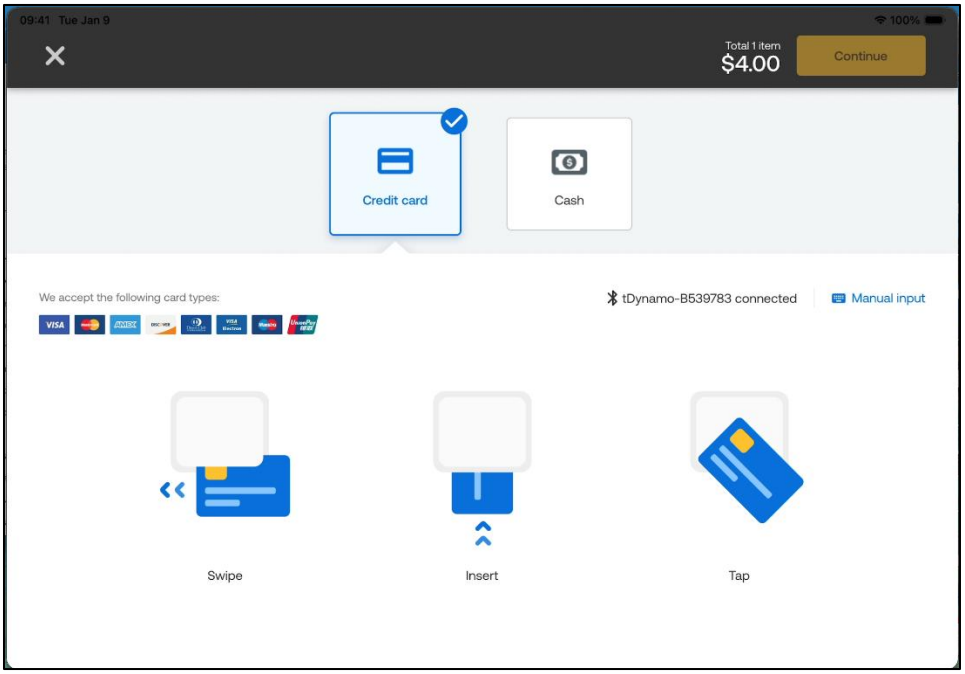
To process EMV card payments when the network is connected:

1. On the sales screen, tap **Pay** to open the payment screen.
2. Tap **Credit card** (selected by default). The card reader is initialized for EMV payments and the **Initializing, please wait…** message appears.



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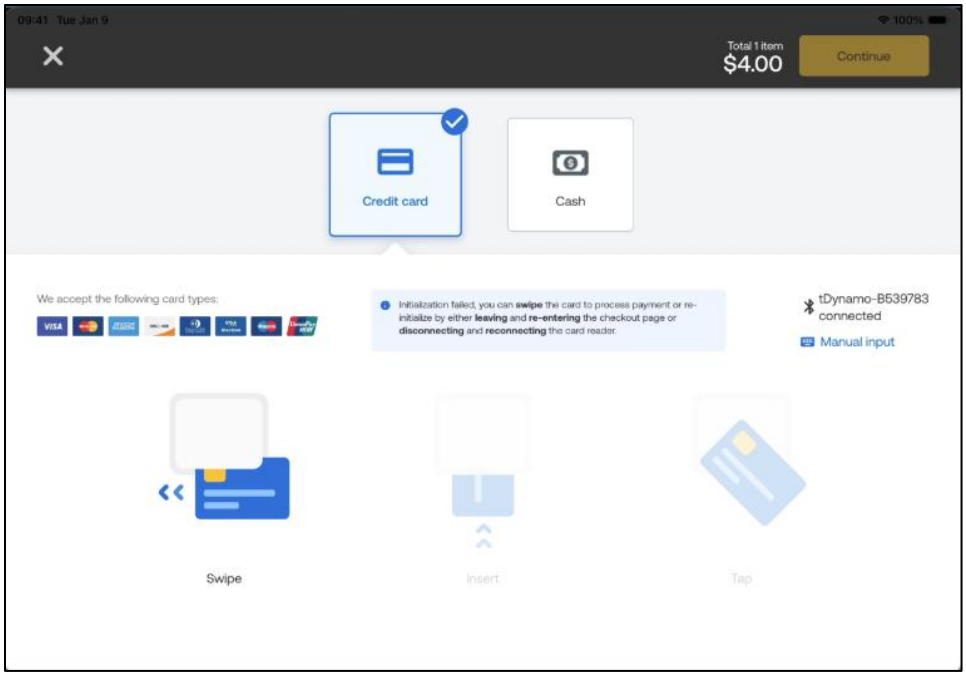
3. Wait until the **Swipe**, **Insert** and **Tap** icons are displayed.



If initialization fails, then the **Insert** and **Tap** icons are greyed out and the following message is displayed: *Initialization failed, you can swipe the card to process payment or re-initialize by either leaving and re-entering the checkout page or disconnecting and reconnecting the card reader.* In this case, either ask the customer to swipe their card, or re-initialize the card reader by:

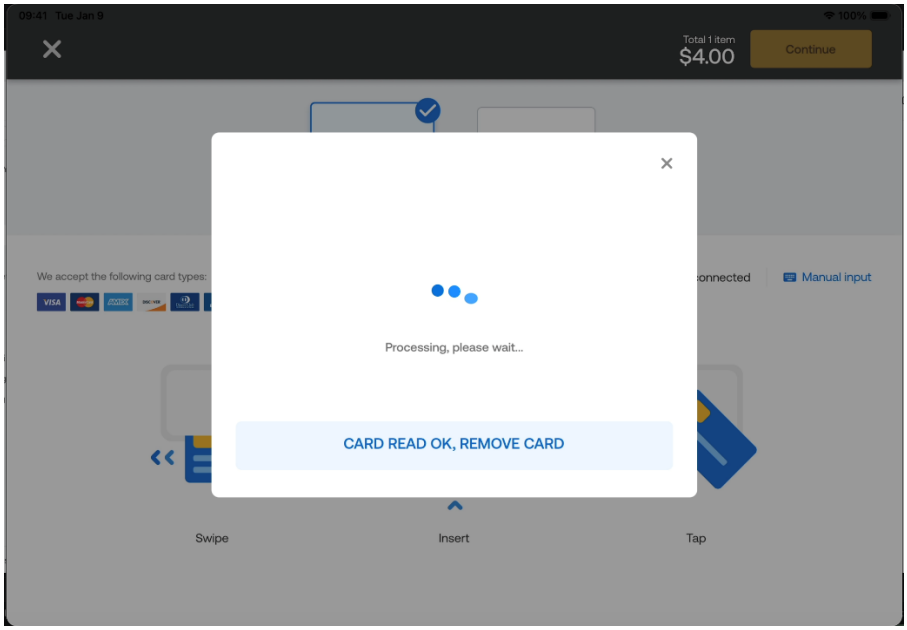
- Tapping the back arrow to leave the payment screen and then tapping **Pay** again, or
- Disconnecting and then reconnecting the card reader.

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4. Ask the customer to either:
    - Insert their chip card into the card reader's chip slot and leave the card in the card reader, or
    - Tap their contactless card on the card reader.
5. The **Processing, please wait...** popup appears. Instructions from the card reader (for example, PLEASE WAIT) are displayed at the bottom of the popup. Follow the card reader instructions and do NOT remove the card until prompted.
    - To cancel the payment before the card has been read, tap **X** on the upper right of the popup. The card reader is then ready for the customer to present a card again.
    - Once the card has been read, the payment can no longer be cancelled (the **X** is disabled).

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6. To email a copy of the receipt to the customer, enter their email address in the **Enter an email address to receive e-receipt** popup and then tap **Continue**. Otherwise tap **No, thanks**.
7. The payment is processed and the order is completed. A signature is NOT required for chip or contactless payments.

Note:

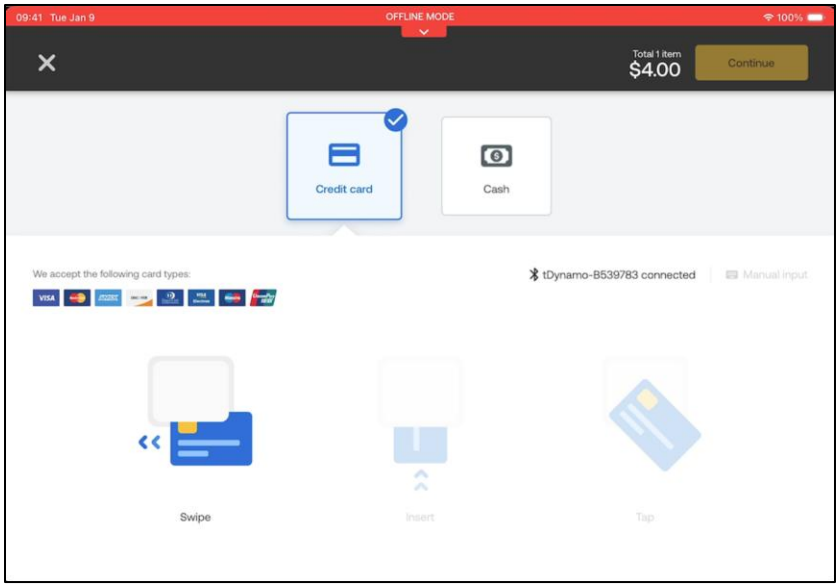
- Customers can still swipe their card or the cashier can manually enter the card information; the steps in Paying by credit cards (online) apply in these cases, including the signature.
- EMV orders are displayed in Order history and refunded in the same way as other credit card orders (see Viewing order history and Refunding an order).

Accepting EMV payments in offline mode

When the mobile POS device is in offline mode, chip and contactless cards are NOT accepted:

- The **Insert** and **Tap** icons on the payment screen are greyed out. Only swiped card and cash payments are accepted.

DC2 - Restricted



Offline swiped card payments are processed as described in Paying by credit cards (offline).

Viewing order history

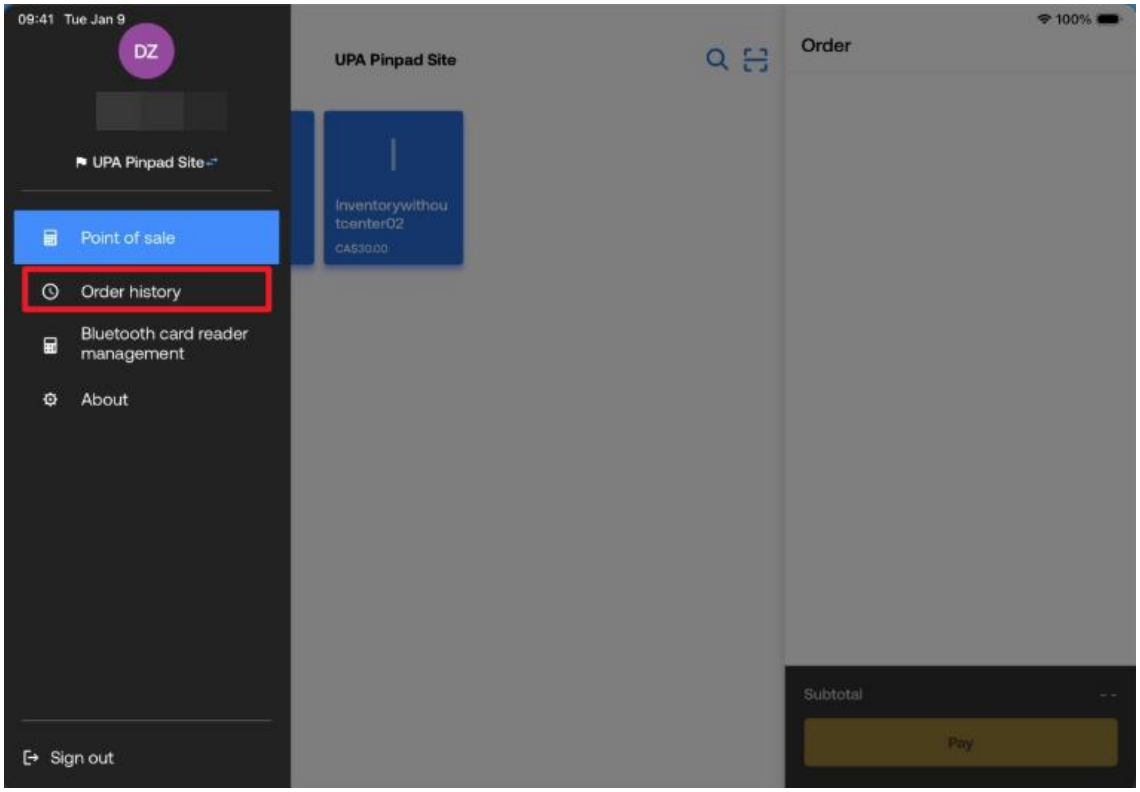
In ACTIVE POS, you can view orders belonging to one event placed by different users on the current device:

- Order history data for the current sign-in user is automatically synced when the device is connected to the internet.
- Successfully completed orders placed on this device are visible to all users in the same event only on this device.
- Offline mode orders placed on this device that were submitted when the device was connected to the internet and subsequently declined (for example, due to an expired card) are visible to all users in the same event only on this device.
- Expired offline mode orders placed on this device that failed to be submitted within the 72-hour window are visible to all users in the same event only on this device.

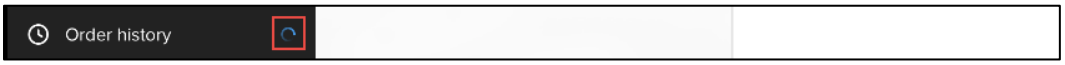
To view an event's order history and order details:

1. Tap the ≡ menu icon on the upper left.
2. In the navigation pane, tap **Order history**.

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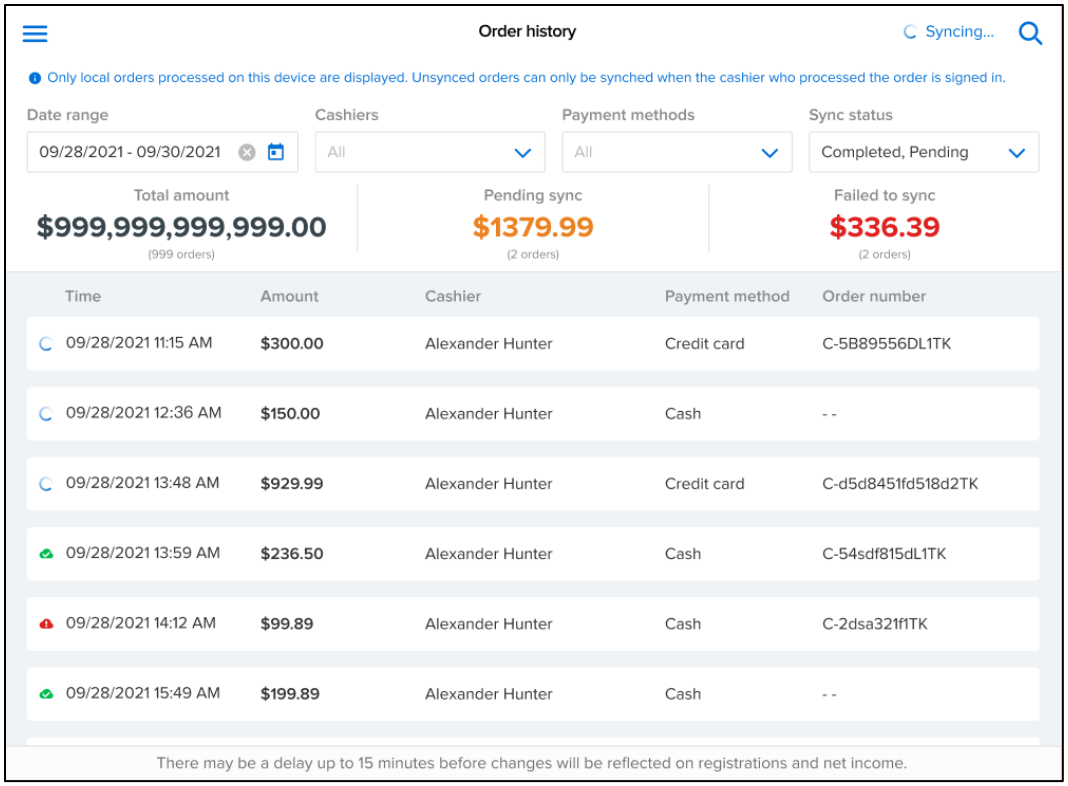


- If there are pending offline transactions being synced, then in the menu pane, a icon appears next to **Order history**.

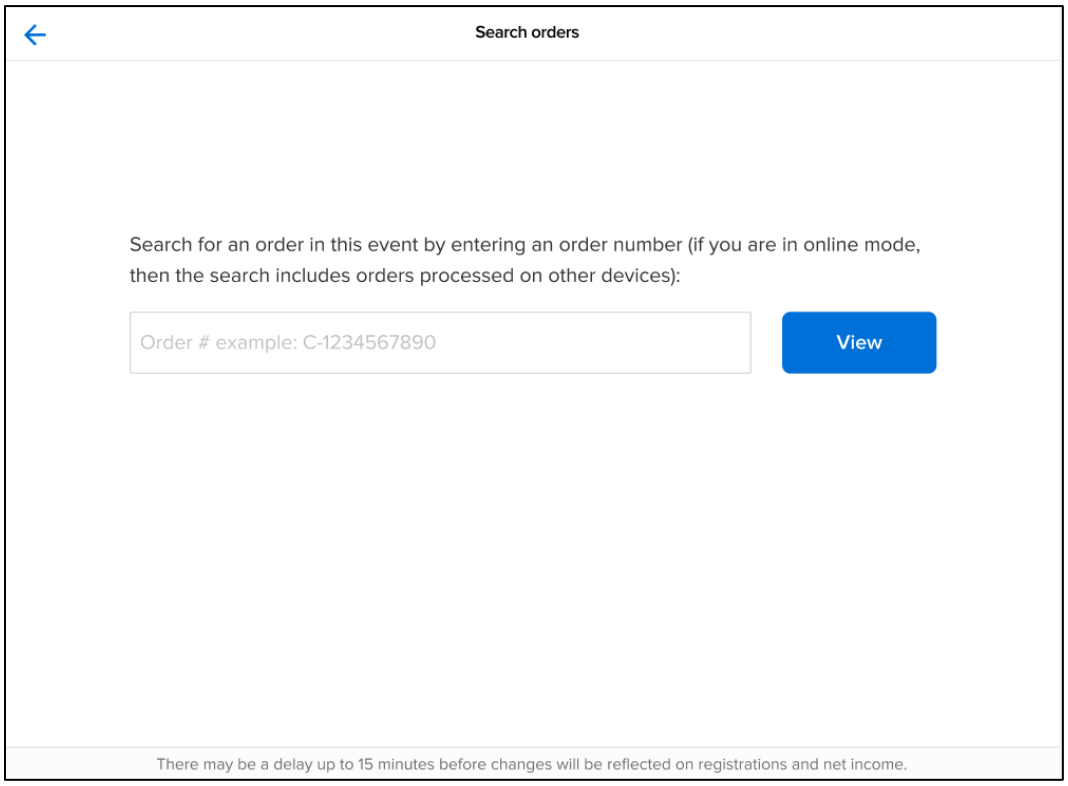


- In the **Order history**, synced, pending, expired offline mode or failed orders placed on this device in the same event are displayed. Order statuses are marked as follows:
  - : Successfully completed and synced orders
  - : Pending sync
  - : Failed to sync (including expired orders and failed orders)

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3. To filter the results, tap the **Date range**, **Cashier**, **Payment method** or **Status** (multi-select) dropdown menus.
4. To search for a specific order by order number, tap the 🔍 icon and then enter the order number:

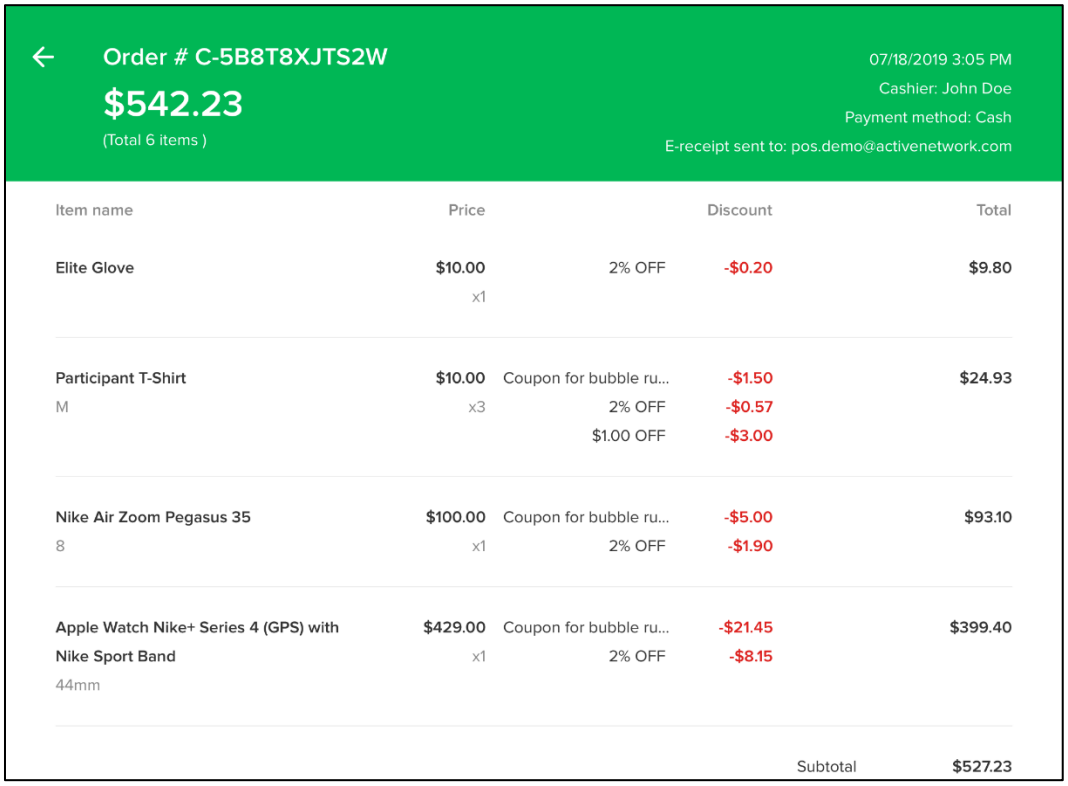


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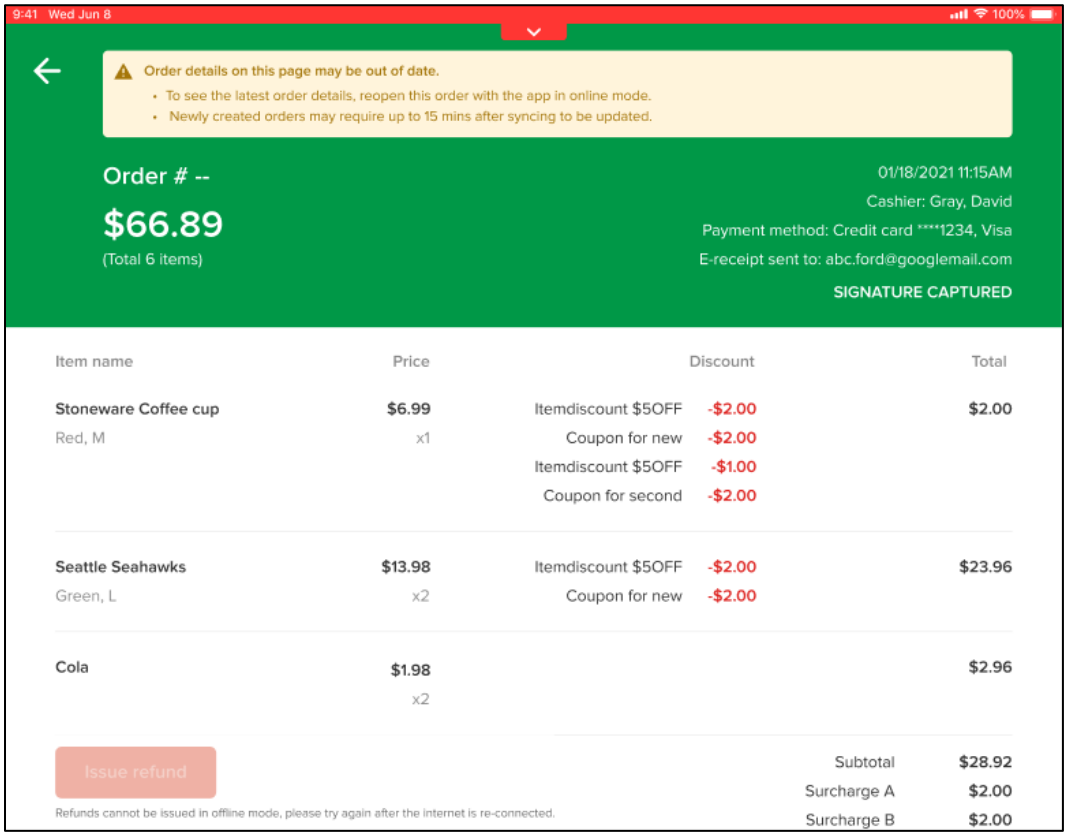
5. To view order details, tap the required order. Note that:
    - When in offline mode, displayed order details may be out of date. To view the latest order details, reopen the order with the app in online mode.
    - After newly created orders are synched, there may be up to a 15-minute delay before the displayed order details are updated to the latest version.

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- Completed order (cash payment):

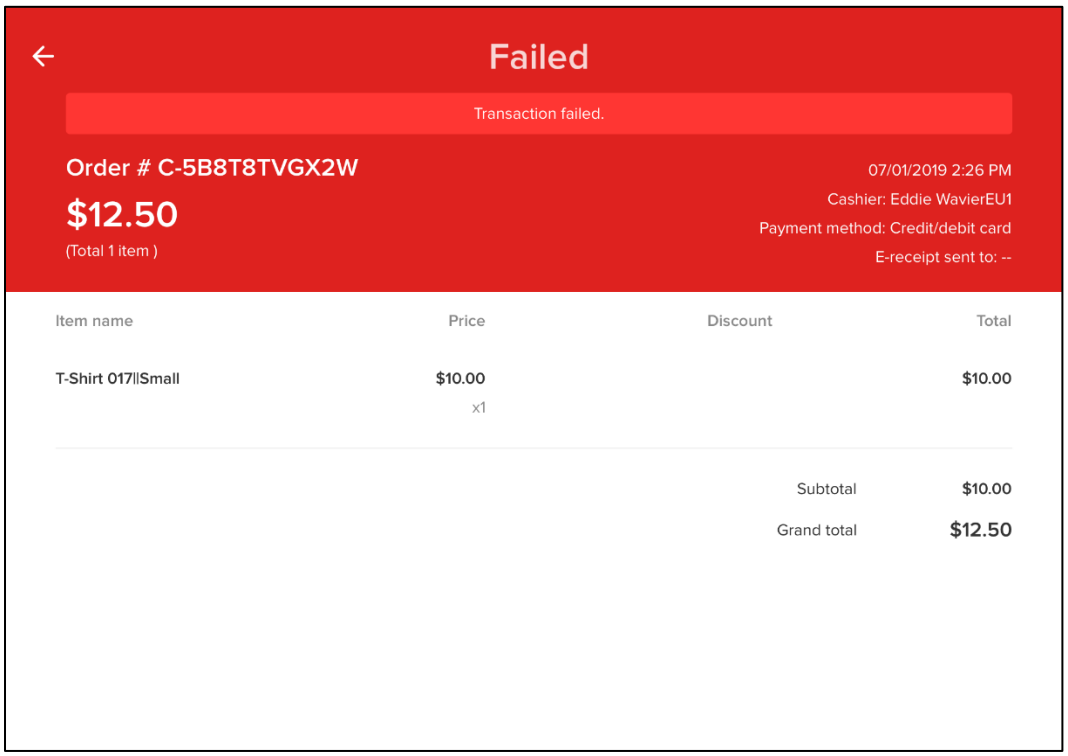


- Completed order (credit card payment with captured signature):



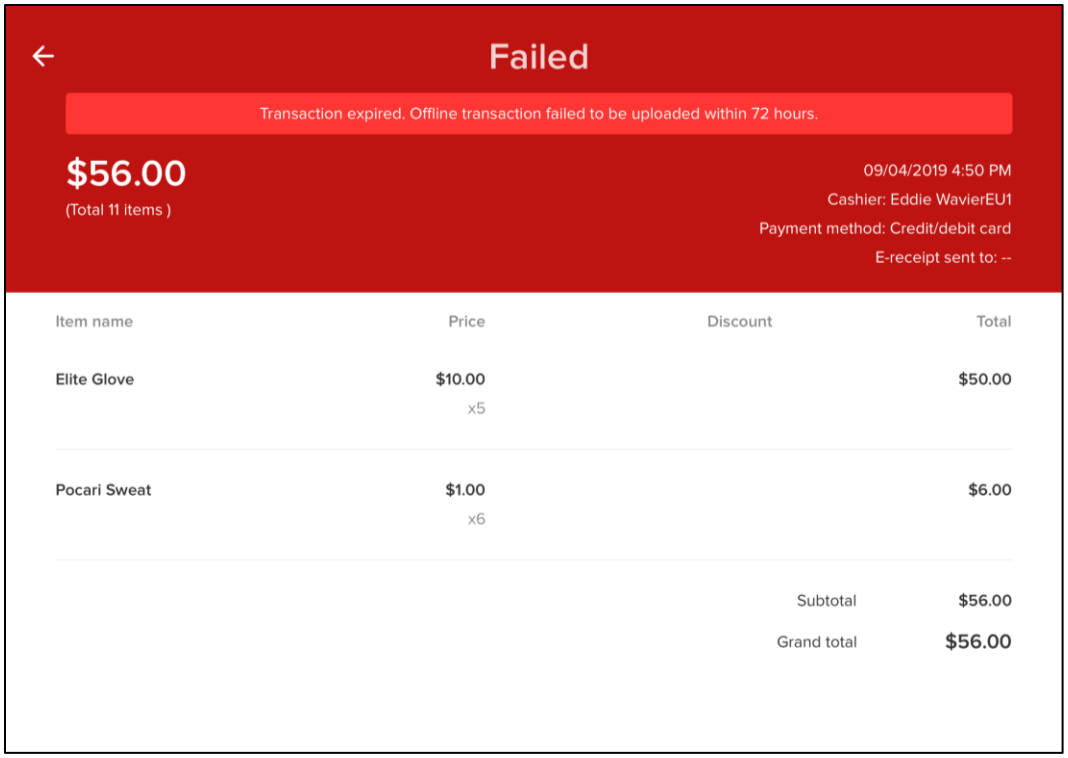
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- Failed order:
  - Offline mode orders submitted within 72 hours and subsequently declined (for example, due to an expired card) are flagged as “Transaction failed”.

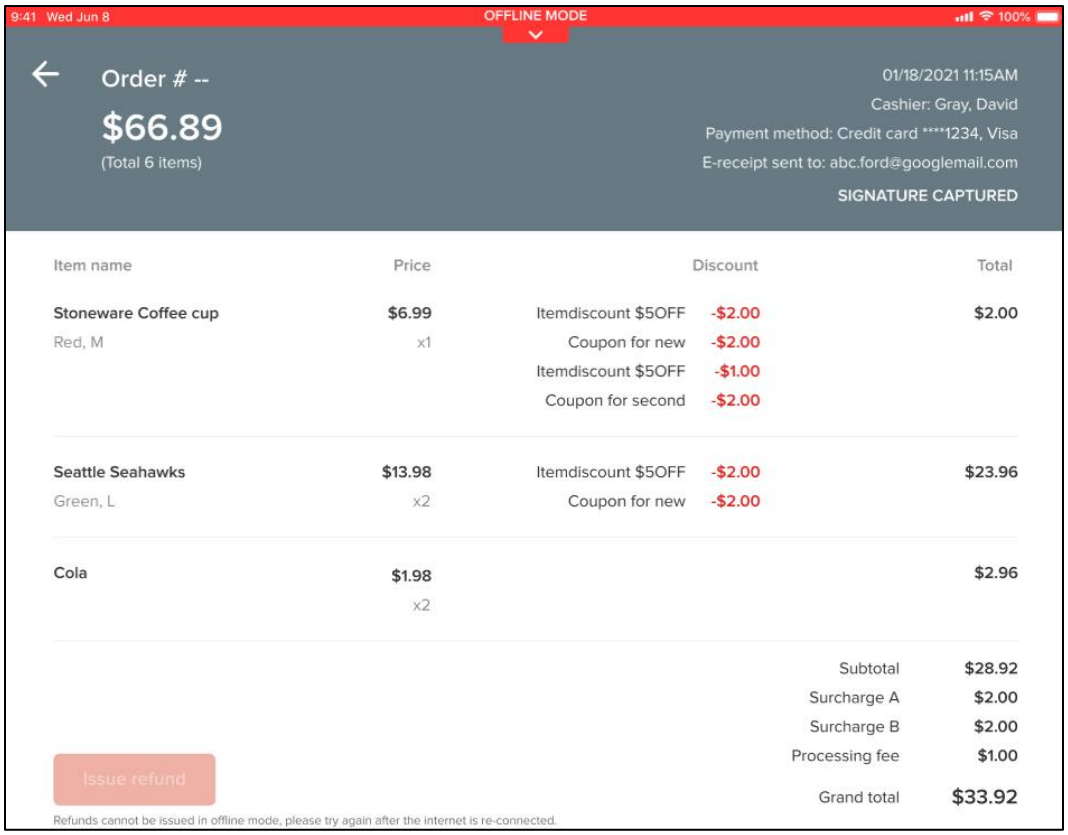


  - Offline mode orders failed to be submitted within 72 hours are flagged as “Transaction expired”.

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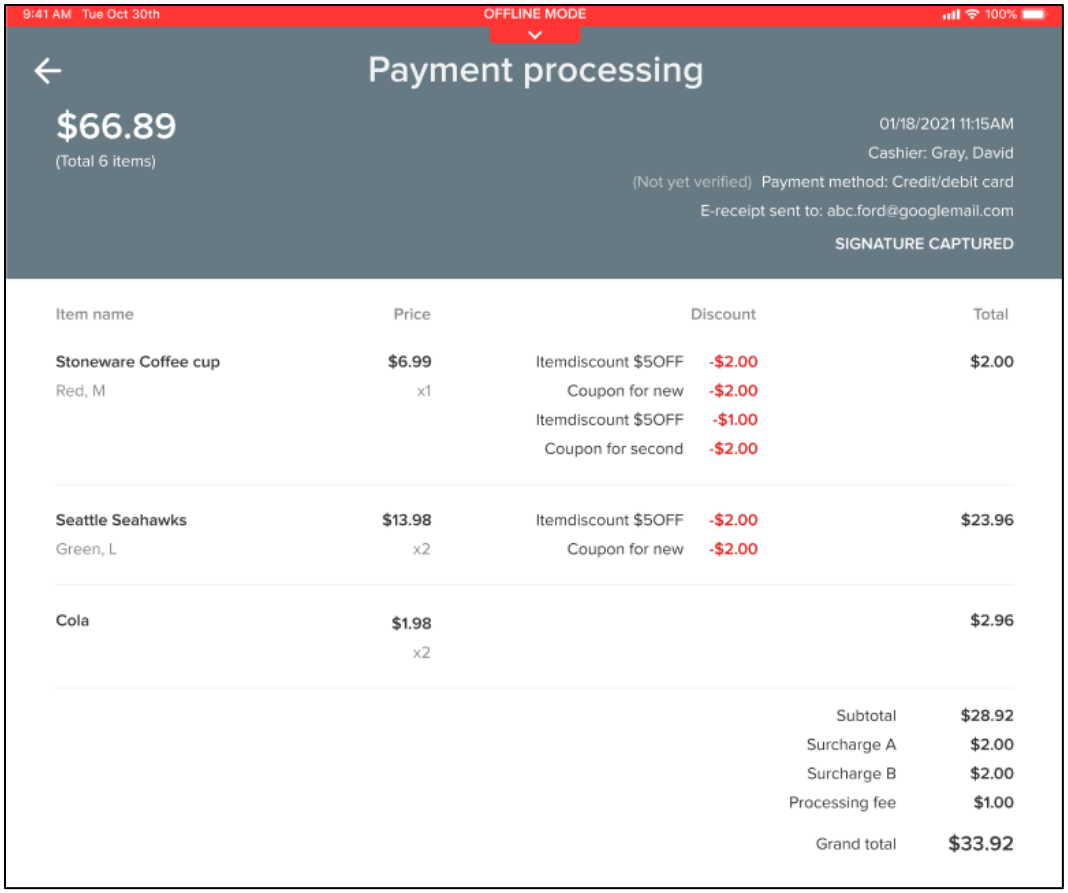


- Pending sync order:



- Payment processing order:

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Refunding an order

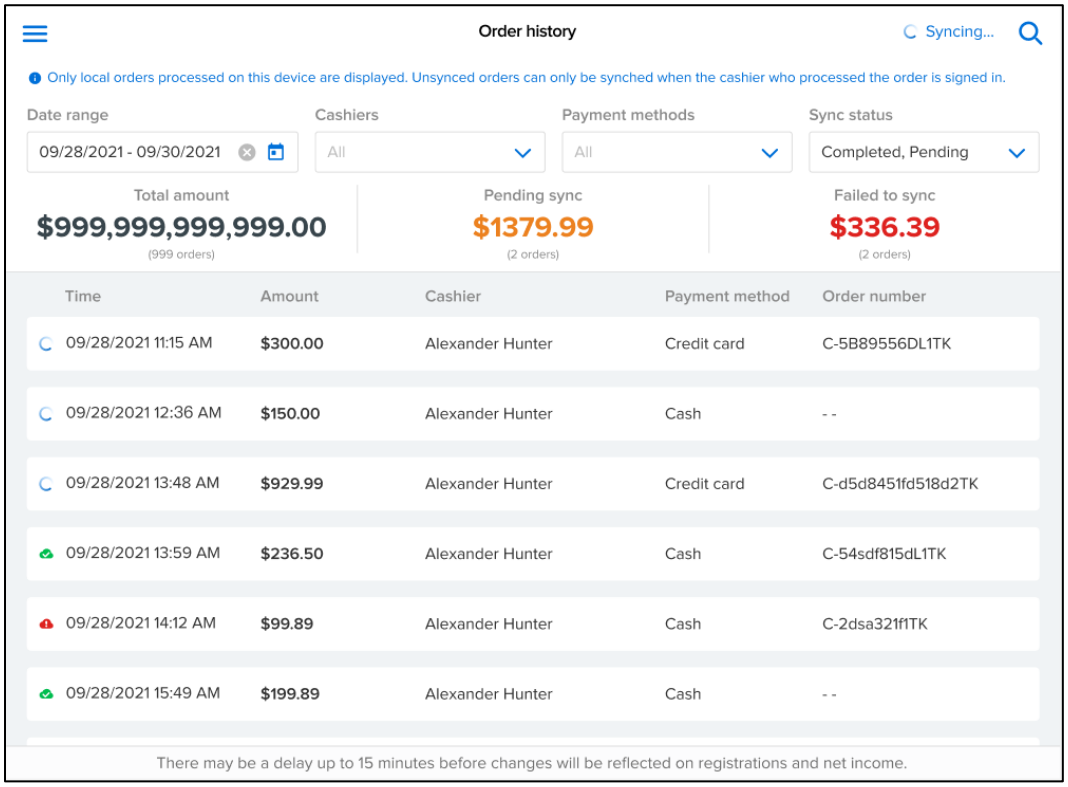
In ACTIVE POS, you can issue a refund for a completed order.

Note:

- Refunds can only be issued when the mobile POS device is online. In offline mode, the **Issue refund** button is greyed out for all orders, including orders paid in cash.
- When online, a newly created order cannot be refunded until it has been synced (this may take up to 15 minutes). The **Issue refund** button remains grayed out until the order is synced. Cash orders without surcharges are an exception and can be refunded immediately without waiting for the order to sync.
- For failed orders, the **Issue Refund** button is hidden.
- For pending orders, the **Issue Refund** button is greyed out.
- After an order is refunded, the refund details may require up to 15 minutes to appear in the order details.
- Once an order has been refunded, it cannot be refunded again even if the order still has an outstanding amount. To issue a refund for a refunded order, please contact ACTIVE support.

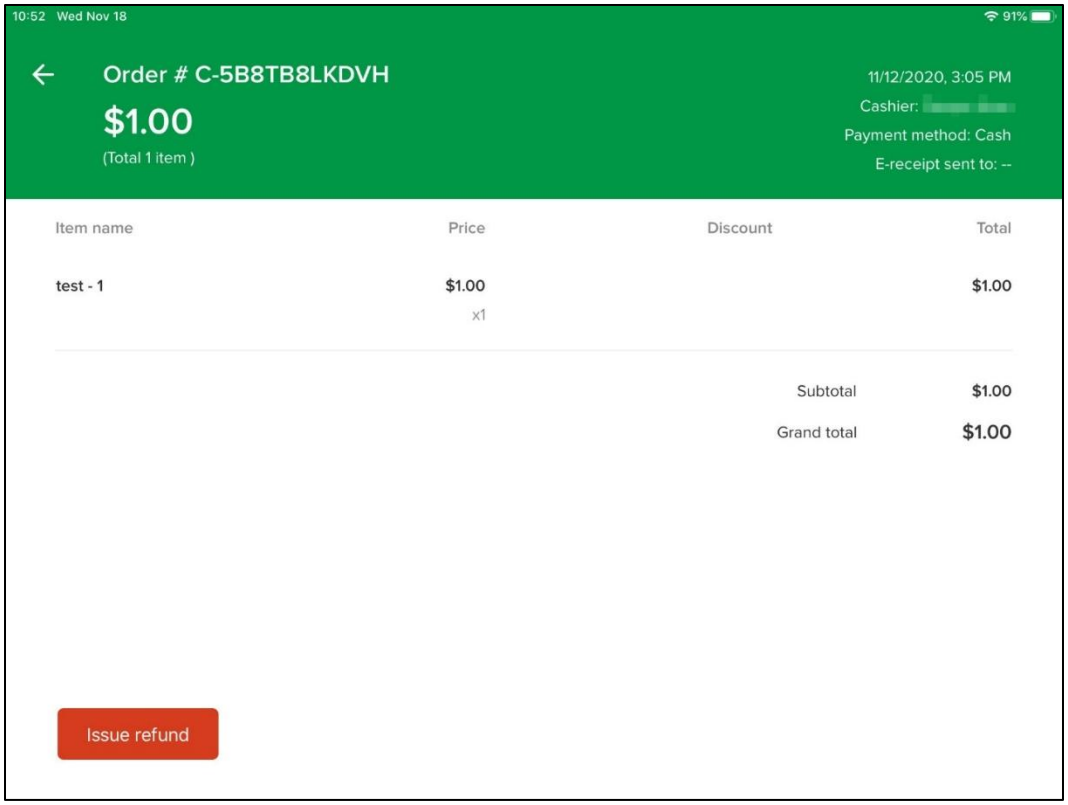
To issue a refund:

1. Tap the ≡ menu icon on the upper left.
2. In the navigation pane, tap **Order history**.
3. In the **Order history**, search for and select the required successfully completed order (marked with a icon).

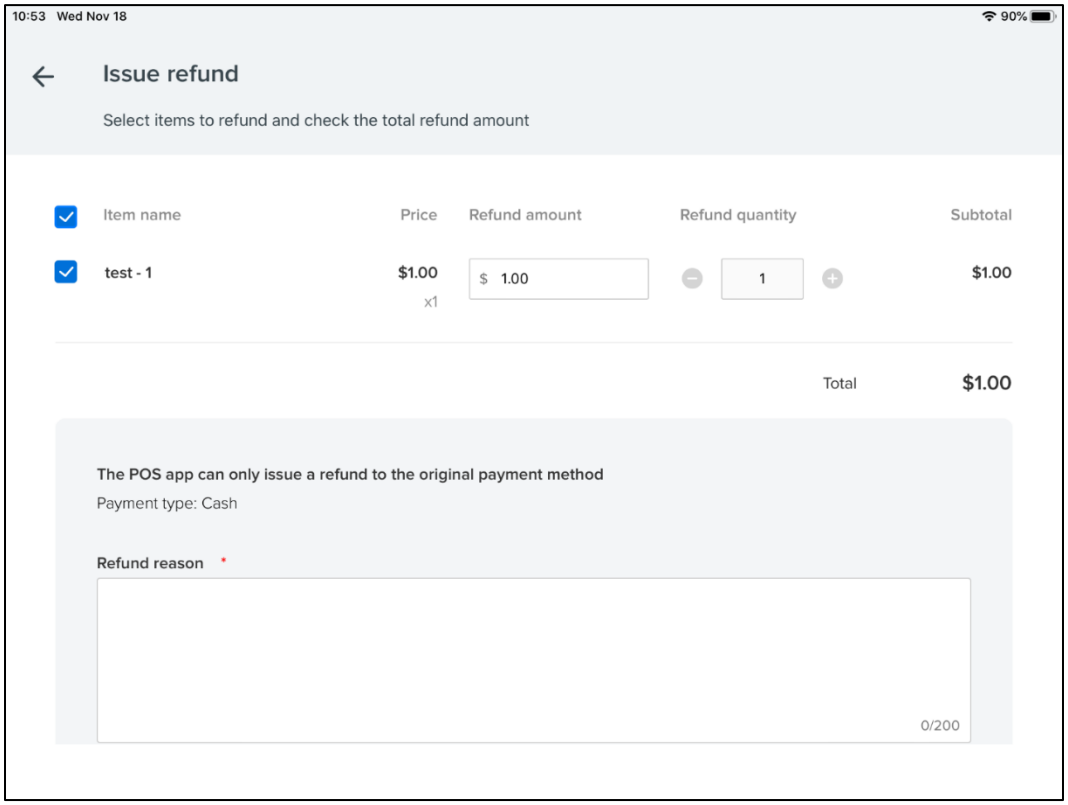


4. On the order detail page, click **Issue Refund**:

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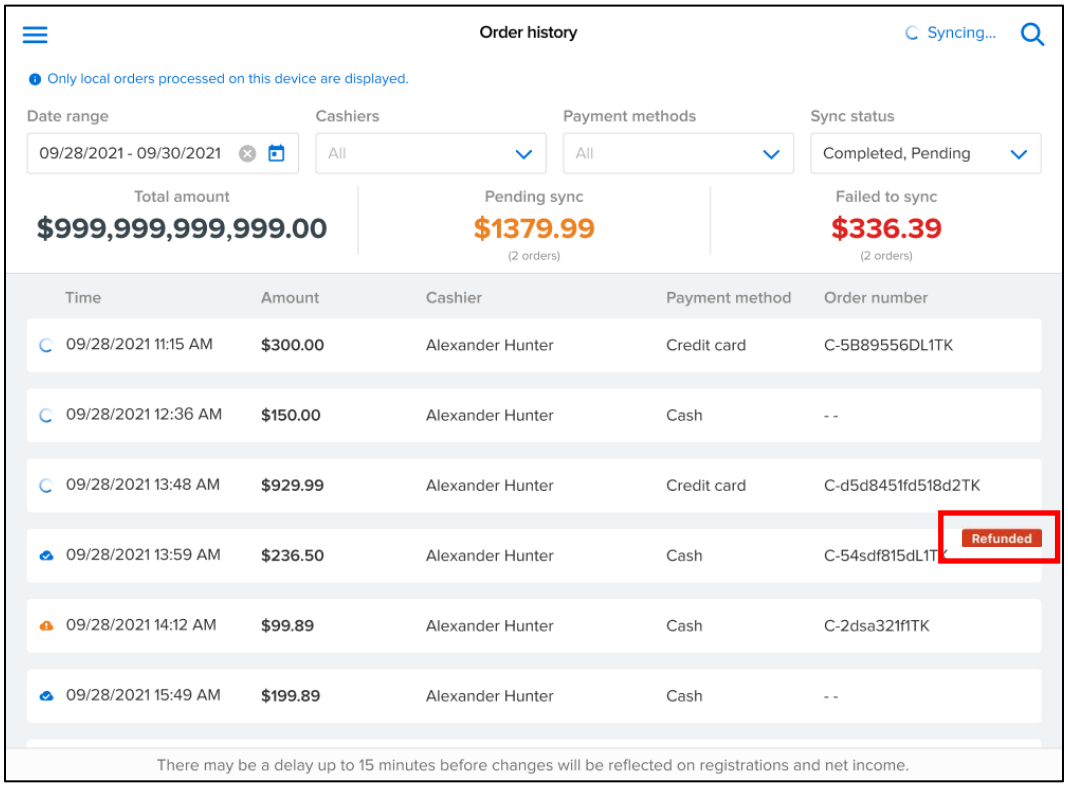
5. On the **Issue refund** page, for each item to refund, enter the refund amount and refund quantity. In the **Refund reason** field, enter the refund reason:



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6. Scroll down to the bottom of the page and click **Refund**. The total refund amount will be refunded to the original payment method.

On the **Order History** page, the top-right corner of a refunded order is marked Refunded.

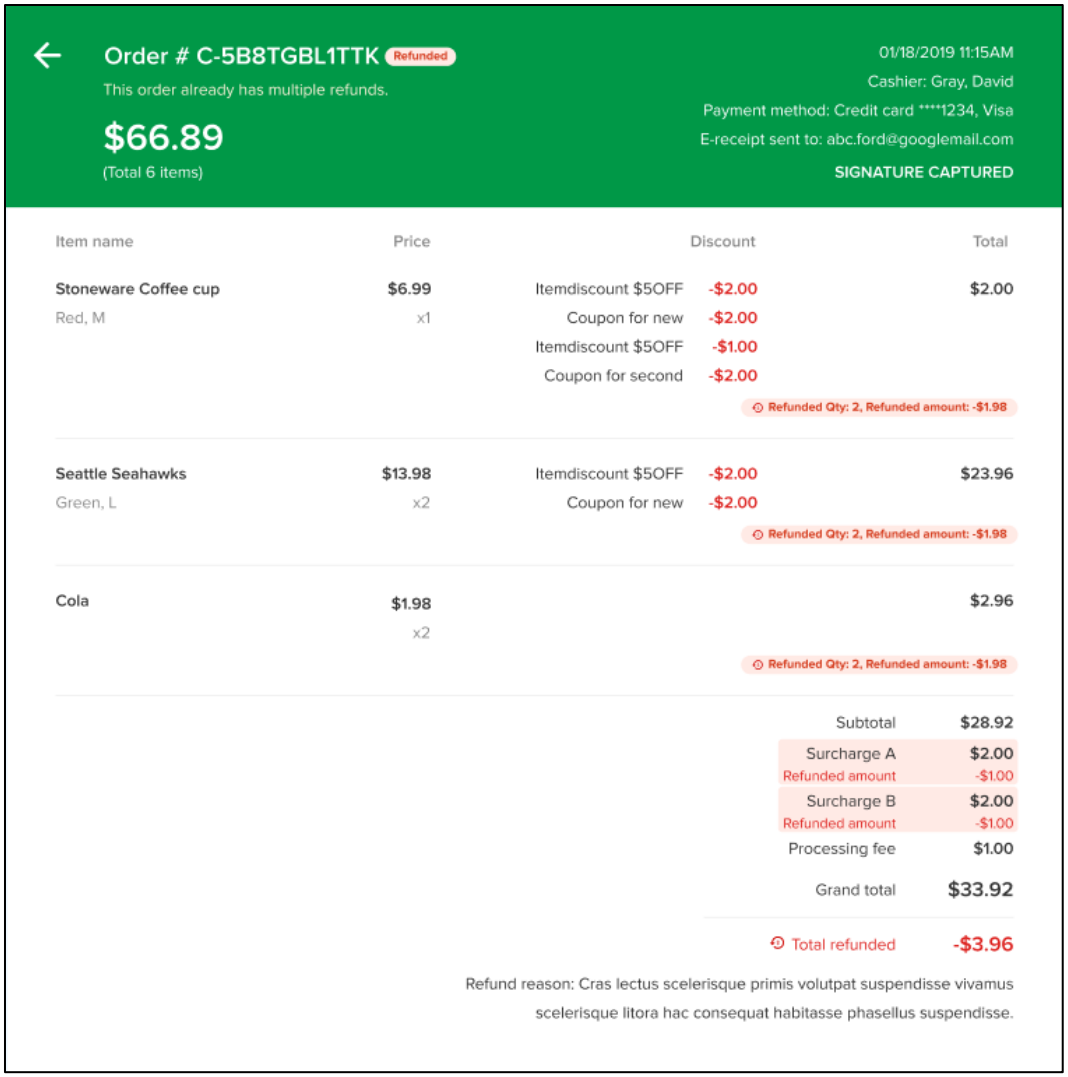


Note: After an order is refunded, the refund details may require up to 15 minutes to appear in the order details.

To view details for a refunded order:

1. Tap the ≡ menu icon on the upper left.
2. In the navigation pane, tap **Order history**.
3. In the **Order history**, search for and select the required refunded order.
    - Under each item, the refunded quantity and amount are displayed in red.
    - The **Total refunded** amount (displayed in red) and **Refund reason** are displayed.

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Note:

- Fully or partially refunding an order returns the sold merchandise to inventory and the refunded merchandise inventory quantities are automatically incremented. Issuing a refund without any change to inventory quantity is not supported.
- Any ACTIVEWorks Endurance item surcharges which are configured to be proportionally refunded are included in the order refund.

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Appendix I: Reconfiguring iDynamo iOS card reader Key Set IDs

iDynamo iOS card reader transactions may fail to be processed because the Key Set ID (KSID) is either unconfigured or incorrectly configured.

To reconfigure the iDynamo iOS card reader KSID:

1. In the **App Store**, download the **MagTek Reader Configuration** app.
2. Open the **MagTek Reader Configuration** app and tap the **Use Public Account** button.
3. Plug in the iDynamo card reader.
4. Tap **Transactions**.
5. Tap **Change Keys**.
6. Tap the **Keys** button.
7. Find and tap **Magensa Key 9011880**.
8. The **Billing** warning appears, tap **Continue**.
9. The **Billing Info** popup appears, enter **ACTIVE** and tap **OK**.
10. The **Updating key** message appears followed by the **Success** message.
11. To ensure that the reader is functioning correctly, perform a test transaction in the ACTIVE POS.

Updates to this process may be found at:

https://support.activenetwork.com/camps/articles/en_US/Article/ACTIVE-POS-Reconfiguring-KSID-on-iDynamo?searchIn=allTypes

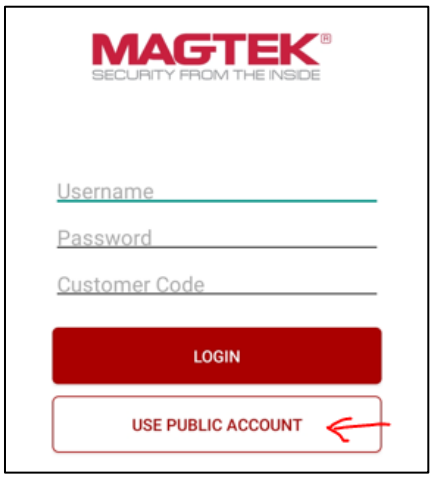
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Appendix II: Reconfiguring uDynamo Android card reader Key Set IDs

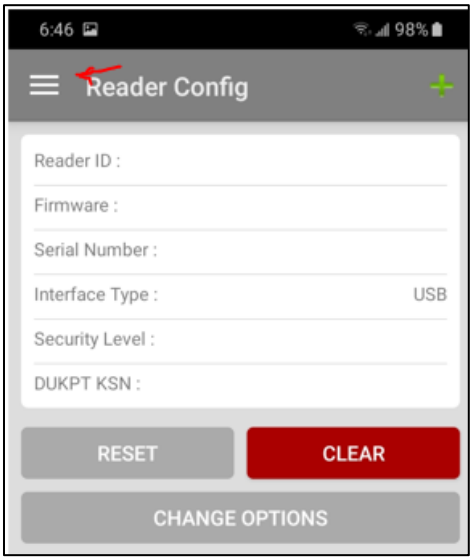
uDynamo Android card reader transactions may fail to be processed because the Key Set ID (KSID) is either unconfigured or incorrectly configured.

To reconfigure the uDynamo Android card reader KSID:

1. In **Google Play**, download the **MagTek Reader Configuration** app.
2. Connect the uDynamo Android card reader to the Android device via USB
3. Open the **MagTek Reader Configuration** app and tap the **USE PUBLIC ACCOUNT** button:

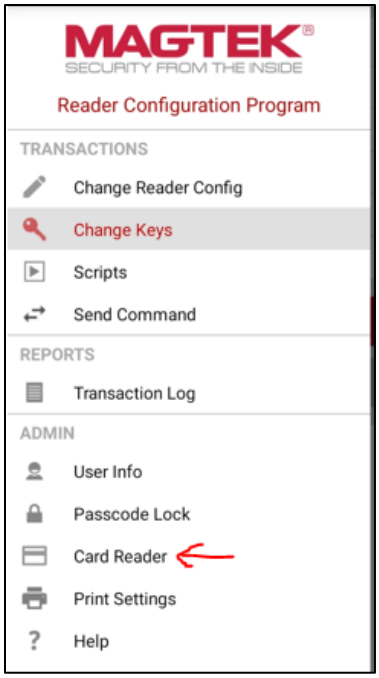


4. Tap the ≡ icon:

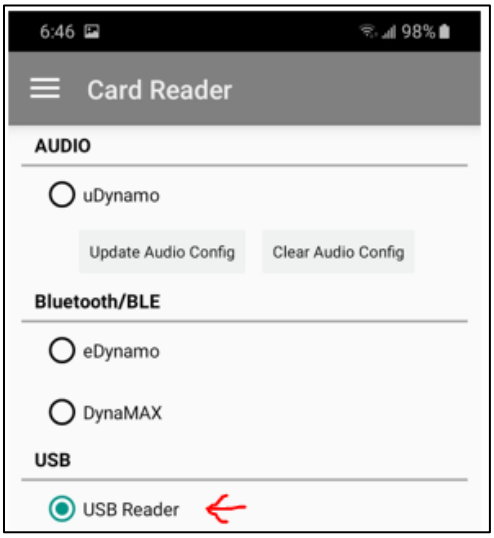


5. Tap **Card Reader**:

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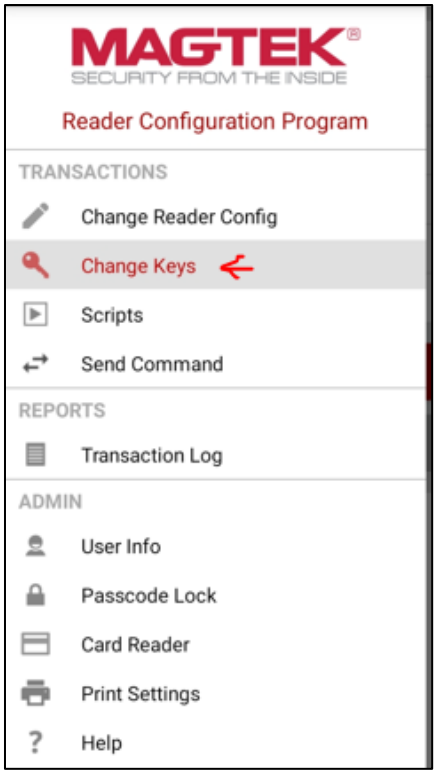


6. On the **Card Reader** page, select **USB Reader**:

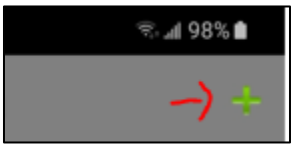


7. Tap the ≡ icon again and then tap **Change Keys**:

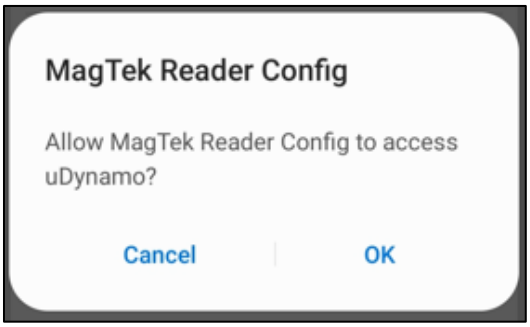
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8. Tap the **+** icon:

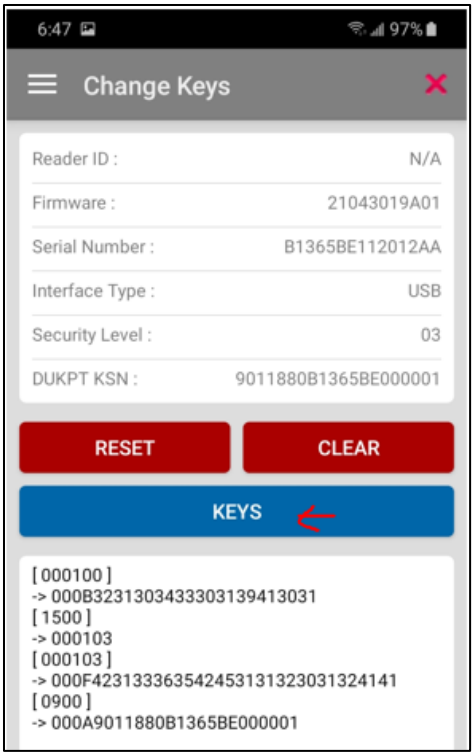


9. To connect to the card reader, tap **OK**:

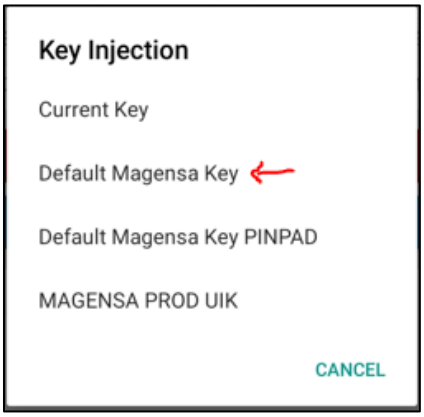


10. Tap the **KEYS** button:

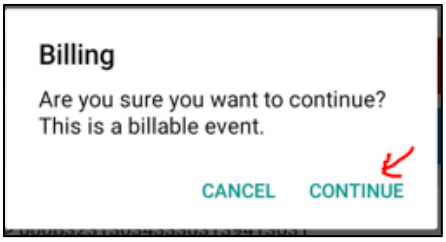
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11. Tap the key to be loaded (**Default Magensa Key**):

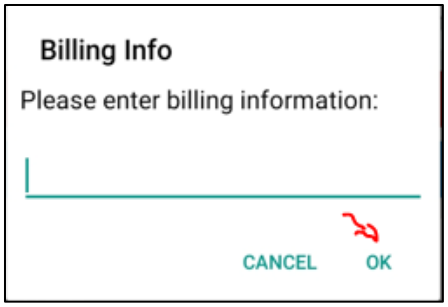


12. Tap **CONTINUE**:

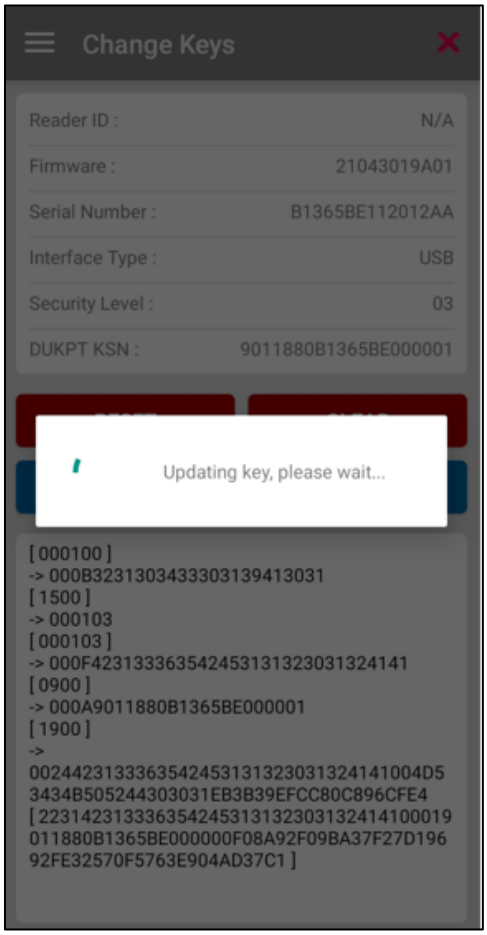


13. On the **Billing Info** popup, enter **ACTIVE** and then tap **OK**:

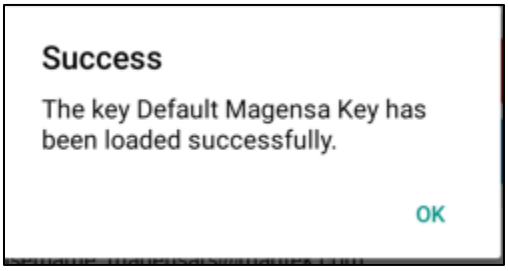
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14. Wait for the key to update:



15. Once the key has been loaded, the **Success** message appears:



16. To ensure that the reader is functioning correctly, perform a test transaction in the ACTIVE POS app.

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Appendix III: Magtek tDynamo Bluetooth Secure Card Reader Operating Modes and Status LEDs

The information in this appendix is presented for convenience and is taken from Magtek's tDynamo Installation and Operation Manual (D998200257) and may be subject to change at Magtek's discretion.

3.1 About Operating Modes

During operation, tDynamo transitions between distinct modes, each of which implements different device behavior:

- **Reset Mode** occurs when the operator presses and the recessed reset switch or holds the pushbutton for 5 to 10 seconds. After resetting, the device progresses to Powered Off Mode. If the device is connected to USB power, it immediately progresses to Discoverable Mode.
- **Powered Off Mode** is the shipping mode of the device. The operator can power off by pressing and holding the pushbutton, and the device enters this mode automatically if it has been in Sleep Mode for a configurable timeout period. When powered off, the device consumes practically no power. To move the device from Powered Off Mode to Discoverable Mode, press the pushbutton briefly or connect the device to USB power.
- **Battery Status Mode** is a short mode that uses all four Status LEDs to report the current charge level of the device's rechargeable battery (see section **3.4.1 About Power**). The operator activates this mode by tapping the pushbutton briefly in Discoverable Mode or Connected Mode. The device automatically exits to the previous mode after a short period of time.
- **Discoverable Mode** is the device's normal waiting state. The operator activates this mode when the device is not connected to USB by briefly pressing the pushbutton once while in Powered Off Mode. In Discoverable mode, the device remains paired with any previously paired Bluetooth LE hosts, but is not connected to transmit data. Upon entering Discoverable Mode, the device advertises itself over Bluetooth LE, and any paired Bluetooth LE host may initiate a connection. To move the device from Discoverable Mode to Pairing Mode, press and hold the pushbutton for about two seconds until the General Status LED flashes, then release the pushbutton. If the device is not connected to USB power, it moves from Discoverable Mode to Sleep Mode automatically when its configurable timeout period has passed. If the device is configured to transmit data over USB and is connected to a USB host, it progresses from Discoverable Mode to Connected Mode when the host software establishes a USB connection.
- **Pairing Mode** is activated while the device is powered on by pressing the pushbutton for two seconds and waiting for the General Status LED to flash, then releasing the pushbutton. In this mode, an unpaired Bluetooth LE host may initiate pairing. Upon entering Pairing Mode, the device advertises over Bluetooth LE, and continues to be pairable until a Bluetooth LE host pairs with it or until a 2-minute timeout period expires. Upon successful pairing, the device enters Discoverable Mode.
- **Connected Mode** occurs when the host software establishes a connection either via Bluetooth LE or USB, generally in response to the host software's graphical user interface. In this mode, the host and the device can both initiate communication, and it is the Bluetooth LE host's responsibility to terminate the connection and return the device to Discoverable Mode to save power when an active data connection is no longer needed for the current transaction. If the device is not connected to USB power, it moves from Connected Mode to Sleep Mode automatically when its configurable Sleep Mode timeout period has passed. If the device is connected to a Bluetooth LE host, it does not advertise and is not discoverable by other Bluetooth LE hosts. If the device is connected to a USB host, it continues to advertise and is discoverable by Bluetooth LE hosts.
- **Sleep Mode** is a low-power standby state. The device enters this mode automatically when it is not connected to USB power and has been unused (no user input, no communication with the host) for a configurable timeout period. In this mode, the device turns off all wireless functions. To move the device from Sleep Mode to Discoverable Mode, press the pushbutton briefly or connect the device to USB power. The device moves from Sleep Mode to Powered Off Mode automatically when its configurable Power Off timeout period has passed.

tDynamo| Three-way Secure Card Reader Authenticator | Installation and Operation Manual

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3.2 About the Status LEDs

tDynamo's **General Status LED (LED 4)** and **Status LEDs 3, 2, and 1** provide feedback to the operator and cardholder about the internal state of the device (see section **1.8 About tDynamo Components**). **Table 3-1** shows how to interpret the colors and flashing patterns of the General Status LED.

Table 3-1 - tDynamo Status LED Meanings

Color	Flashing Pattern		Meaning
Off	Off		The device is powered off, or the battery is completely drained and needs to be recharged.
Green Amber Red	Flashing Periodically		The device flashes the General Status LED every 5 seconds when it is powered on and is in Connected mode, ready for the host to send it a command or for a cardholder to swipe a magnetic stripe card. The color indicates the battery charge level: • Green = Recharge if desired • Amber = Recharge soon • Red = Recharge immediately (device can not process transactions)
Green	LEDs 4, 3, 2, 1 Light **In Sequence**		The device has read a contactless tap, and the cardholder can safely remove the card or device from the contactless landing zone.
Green	LEDs 4, 3, 2, 1 Light **Simultaneously**		The device has just been powered on and is testing the four Status LEDs.
Green	LEDs 4, 3, 2, 1 Light **In Combination**		An operator has pressed the pushbutton briefly and the device is reporting battery charge level. See section **3.4.1 About Power**.
Green	Steady On		The General Status LED (LED 4) is lit green when the host has initiated an EMV transaction that allows the cardholder to present a contactless card or contactless device.
Blue	Solid On		The General Status LED (LED 4) is lit blue when the operator presses the pushbutton, to provide feedback that the pushbutton is working correctly.
Blue	Three Flashes		The operator has pressed the pushbutton for 2 seconds, and the device transitions to Pairing Mode if the operator releases the pushbutton.
Blue	Short Flashing		The device is in Pairing Mode, advertising, and ready for a Bluetooth LE host to initiate pairing.
Color	**Flashing Pattern**		**Meaning**
Red	Steady On		The device is in Sleep Mode. The General Status LED is solid red and LED 3 is solid green.
Red	Steady On		An operator is updating the firmware. On completion, the device resets and all LEDs turn off briefly.

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