

ACTIVE POS User Guide

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ACTIVE Network, LLC
Dallas Corporate Office
5800 Granite Parkway - 12th Floor
Plano, Texas 75201
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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 <u>ACTIVEnetwork.com</u>.



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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 14 or later.
- Samsung Galaxy S4 tablets running Android 10 or later.

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) (<u>https://www.magtek.com/product/idynamo</u>)
 - MagTek iDynamo 6 Lightning Secure Card Reader (Magtek PN: 21087016) (<u>https://www.magtek.com/product/idynamo-6</u>)
- For Samsung Galaxy S4 tablets:
 - MagTek uDynamo Audio Jack Swipe Card Reader (Magtek PN: 21073092 REV C) (<u>https://www.magtek.com/product/udynamo</u>)
 - MagTek iDynamo 6 USB-C Secure Card Reader (Magtek PN: 21087019) (https://www.magtek.com/product/idynamo-6)

If the card reader was purchased:

• directly from ACTIVE, then it is preconfigured with the correct Key Set ID (KSID) and can be plugged into 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 plugged in, the POS checkout screens on iPad/iPad mini and Samsung Galaxy S4 tablets display different card reader installation instructions:

| × | | Total 6 Ite \$66.8 | 9 Continue |
|---------------|-------------|-----------------------|------------|
| | Credit card | Cash | |
| Name on card* | | We accept these | cards: |
| | | | |
| Card number* | | | |
| Card number* | I | 3 | |
| Card number* | cvv/cvc* o | ••• | |
| Card number* | cvv/cvc* @ | ••• | |
| Card number* | cvv/cvc* @ | ••• | |

iPad or iPad mini



| | Samsung G | alaxy S4 | |
|------------------------|-------------|-------------------------------|--------------------------|
| × | | ^{Total} \$66 | 6 items 5.89 Continue |
| | Credit card | G Cash | |
| Name on card* | | We accept th | he following cards: |
| Card number* | | | |
| XXXX XXXX XXXX XXXX | | | |
| Expiration date* | CVV/CVC* 0 | | |
| MM / YYYY | XXX | | |
| Email example@mail.com | | Enter an email address to rec | eive e-receipt |

To install a card reader on the mobile POS device:

- For Apple iPad devices: plug the card reader into the Lightning port.
- For Samsung Galaxy S4 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.



Samsung Galaxy S4



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



| Date range | | Cashier | | Payment method | | Sync status | |
|--|----------|---------|--|--|---|--|---|
| Select date range | Ē | All | ~ | All | ~ | All | ~ |
| Total amor £0.00 (0 orders) | unt D | | Pending £0.0 | sync)0 ^{rs)} | | Failed to sync £0.000 (0 orders) | 6 |
| | | | This card reader is n accept payments, authorize i | ot authorized to do you want to t now? | | | |
| | | | | | | | |

Once the card reader is connected, the **Card reader connected** message appears on the current screen:

| × | ⊘ Card reader | connected Continue |
|------------------------|---------------|---|
| | Credit card | Cash |
| Name on card • | | We accept these cards: |
| Card number* | | |
| Expiration date* | | ¥ |
| Email example@mail.com | | Enter an email address to receive e-receint |
| Email example@mail.com | | Enter an email address to receive e-receipt |

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



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 (<u>support.activenetwork.com/endurance</u> or <u>clientcare@activenetwork.com</u>)
- 2. Generate barcodes from the product IDs using a third-party barcode tool. The following barcode types are supported:
 - code128 (recommended by ACTIVE POS)
 - aztec
 - code39
 - code39mod43
 - code93
 - ean13 (iOS can convert upca barcodes to ean13 by adding a 0 in front.)
 - ean8
 - pdf417
 - qr
 - upce
 - interleaved2of5 (when available)
 - itf14 (when available)
 - datamatrix (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.



- 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 <u>Tips for Using Public Wi-Fi</u> <u>Networks</u>.
- 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.



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.



- 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 <u>offline</u> order; subsequent orders will be processed as online orders.



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:

| | • Connect. |
|---------------------------|-----------------------|
| | A Passport |
| Sign in | |
| Email address | |
| | |
| Password | |
| Stay signed in | Forgot your password? |
| | Sign in |
| Don't have an account? Jo | bin now |
| | Астиче |
| < > | nere. |



| | 🕗 Pas | sport | |
|--|---|---|-------------------------------|
| Verify y | our identit | У | |
| We've sent an e k.com . Please c as soon as it is r | mail with a verificati heck your inbox and eceived. | on code to ch******@ SPAM folders and e | activenetwor nter the code |
| Please copy and | I paste the code her | re: | |
| Verification co | de | | |
| 🔽 Don't ask agai | n on this device after ve | erifying | |
| | Verify & p | proceed | |
| | Terms Copyright | IVE Privacy Support | |
| | Copylight | Thracy Support | Ø |
| , | | | 4 |

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.

12



| sase select your country so that we can provide you with correct terms and Conditions and Privacy P ccuments. | 'olicy |
|--|---|
| | |
| nited States | |
| anada | |
| aland Islands | |
| 'ghanistan | |
| | |
| e | Pase select your country so that we can provide you with correct Terms and Conditions and Privacy F cuments. |

| | 13 01 030 | |
|--|---|---------------------------------|
| You must accept our Terms of Us provide your consent. | e and acknowledge our Privacy Policy to use o | our services. Please review and |
| I have read and agree to | ACTIVE Network's Terms of Use | |
| I have read and agree to | ACTIVE Network's Privacy Policy | |
| | | |
| | | |
| | | |
| | | |
| | | |



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

| Sign out | |
|----------|--|
| | Welcome, John! |
| | Please select your organization. Cool Events LLC |
| | WTC |
| | |
| | |
| | |
| | |
| | |

4. Tap the required event.

| < | Select organization | Select event | | Current events 🔻 |
|---|--|--------------|------------|------------------|
| | Event name | Start date | End date | |
| | Dallas Breathe Easy Asthma Awareness 5K Run | 04/01/2019 | 04/01/2020 | |
| | Hawaiian Falls THE COLONY 13.1/10K/5K | 04/01/2019 | 04/01/2020 | |
| | Irving Marathon | 04/01/2019 | 04/01/2020 | |
| | The Colony Half Marathon and Green Dragon 10 Miler | 04/01/2019 | 04/01/2020 | |
| | The Colony Half Marathon and Green Dragon 15 Miler | 04/01/2019 | 04/01/2020 | |
| | The Colony Half Marathon and Green Dragon 20 Miler | 04/01/2019 | 04/01/2020 | |
| | The Colony Half Marathon and Green Dragon 5 Miler | 04/01/2019 | 04/01/2020 | |
| | Bubble Run - Fort Worth | 04/23/2019 | 12/31/2019 | S |
| | Color Run - Chengdu | 03/31/2020 | 12/08/2020 | |

If you need to select a past event, then tap **Current events > Past events**.



| < | Select organization | Select event | | Current events |
|---|---|--------------------------|------------------------|---------------------------------|
| | Event name Dallas Breathe Easy Asthma Awareness 5K Run | Start date 04/01/2019 | End date 04/01/2020 | ✓ Current events Past events |
| | Hawaiian Falls THE COLONY 13.1/10K/5K | 04/01/2019 | 04/01/2020 | |
| | Irving Marathon | 04/01/2019 | 04/01/2020 | |

Available merchandise for this event is loaded and displayed.

| = | Bubble Run - Fort Worth | Q 🗄 | Order |
|--|---|-----------------------------------|----------|
| Apple Watch Nike+ Serie \$399.00 - \$429 | Custom Clothes \$0.00 Custom Elite Glove \$10.00 Custom Stoco Stoco | Nike Air Zoom Pega \$100.00 | |
| Pants s0.00 | Participant T- Shirt \$10.00 | Sports shoes \$0.00 | |
| T-Shirt 017 \$0.00 - \$100.00 | | | |
| | | | Subtotal |
| | | | Pay |

Switching between events

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

1. Tap the \equiv menu icon on the upper left.

| Bubble Run - Fort Worth | Q [] | Order |
|-------------------------|------|-------|
|-------------------------|------|-------|

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



| a | le Run - Fort Worth | Q [] | Order |
|---|---------------------|-----------------------|-------|
| Hi, John WTC ▶ Bubble Run - Fort Worth +* | Elite Glove | Nike Air Zoom Pega | |
| Point of sale | 310.00 | \$100.00 | |
| O Order history | Sol Sol | | |
| 🗘 About | Pocari Sweat Shoes | Sports shoes | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| [→ Sign out | | | |

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

| < | Select organization | Select event | | Current events 💌 |
|---|--|--------------|------------|------------------|
| | Event name | Start date | End date | |
| | 2019 CRC Mother's Day Half Marathon | 04/01/2019 | 04/01/2020 | |
| | Dallas Breathe Easy Asthma Awareness 5K Run | 04/01/2019 | 04/01/2020 | 0 |
| | Hawaiian Falls THE COLONY 13.1/10K/5K | 04/01/2019 | 04/01/2020 | |
| | Irving Marathon | 04/01/2019 | 04/01/2020 | |
| | The Colony Half Marathon and Green Dragon 10 Miler | 04/01/2019 | 04/01/2020 | |
| | The Colony Half Marathon and Green Dragon 15 Miler | 04/01/2019 | 04/01/2020 | |
| | The Colony Half Marathon and Green Dragon 20 Miler | 04/01/2019 | 04/01/2020 | |
| | The Colony Half Marathon and Green Dragon 5 Miler | 04/01/2019 | 04/01/2020 | |
| _ | Bubble Run - Fort Worth | 04/23/2019 | 12/31/2019 | |

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.



| < | Select organization | Select event | | Current events 🔻 |
|---|---|--------------|------------|------------------|
| | Event name | Start date | End date | |
| | 2019 CRC Mother's Day Half Marathon | 04/01/2019 | 04/01/2020 | |
| | Dallas Breathe Easy Asthma Awareness 5K Run | 04/01/2019 | 04/01/2020 | 0 |

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 \bigcirc (**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.



| = | Bubble Run - Fort Worth | Q 🗄 | Order |
|---|---|-----------------------------------|-----------------|
| Apple Watch Niket Serie \$39900 - \$429 | Custom Clothes 50.00 Elite Glove 510.00 Elite Glove 510.00 | Nike Alr Zoom Pega \$100.00 | |
| Pants so.oo | Participant T Shirt \$10.00 Pocari Sweat \$100 Shoes \$0.00 | Sports shoes \$0.00 | |
| T-Shirt 017 \$0.00 - \$100.00 | | | |
| | | | Subtotal Pay |
| | | | |
| | | | |
| ← Q t-shirt | | ⊗ | Order |
| C t-shirt | T0 T-Shirt 017 \$0.00 - \$100.00 | | Order |
| C t-shirt | T0 TShirt 017 \$000 • \$100.00 | | Order |

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



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 <u>Offline mode</u> for more information).



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



| | Participant T-Shirt | Order (1 item) | Clear all |
|----------------------------|---|---------------------------|-----------|
| | From Hopkinton to Wellesley to Newton to Boylston, you took part in one of America's oldest traditions. You've run Boston. That's worth showing off. | Elite Glove ×1 | \$10.00 |
| 12 | \$10.00 | | |
| Apple Watch Nike+ Serie | S M L | | |
| | XL 2XL 3XL | | |
| Pants | | | |
| \$0.00 | | | |
| ТО | _ 1 + | | |
| T-Shirt 017 | | | |
| \$0.00 - \$100.00 | Add discount | Subtotal Discount(s) 🕂 | \$10.00 |
| | Add | Pay \$10.00 | |

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:

| ≡ | T-shirt | Order |
|--|--------------------|----------|
| • | \$10.00 | |
| | size | |
| Apple Watch Nike+ Serie \$399.00 - \$429 | Small Medium Large | |
| | color | |
| | Red Blue Dark | |
| Pants \$0.00 | White Pink | |
| ТО | - 1 + | |
| T-Shirt 017 | | |
| | Add discount | |
| | | Subtotal |
| | Add | Pay |



| ≡ | T-shirt | Order |
|--|---------------------------------------|-----------------|
| Apple Watch Nike+ Serie \$399.00 - \$429 | \$10.00 size Small Medium Large | |
| Pants \$0.00 | Color Red Blue Dark White Pink | |
| T-Shirt 017 \$0.00 - \$100.00 | - 3 + | |
| | Add | Subtotal Pay |

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 <u>Applying coupons and discounts</u> for more information.

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



| ≡ | Bubble Run - Fort Worth | Q [] | Order (3 items) | Clear all |
|--|---|----------------------------------|----------------------------------|-----------|
| Apple Watch Nike+ Serie. S399.00 : \$429. Pants \$0.00 T-Shirt 017 \$0.00 : \$100.00 | Custom Clothes sooImage: Custom Elite Glove stooImage: Custom Elite Glove stooParticipant T- Shirt stooImage: Custom Custom Pocari Sweat stooImage: Custom StooPocari Sweat stooImage: Custom StooImage: Custom Stoo | Nike Air Zoom Pega Stoo.oo | T-shirt x3 Small, Blue | \$30.00 |
| | | | Subtotal Discount(s) 🛨 Pay | \$30.00 |

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.



 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).





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.



| ≡ | Shorts | | Order (2 items) | Clear all |
|----------------------------------|--------------|--------|---------------------------|-----------|
| 12 | \$5.00 | | Elite Glove ×1 | \$10.00 |
| Apple Watch Nike+ Serie | Small Medium | Large | Shorts x1 Small | \$5.00 |
| Pants \$0.00 | Extra large | | | |
| ТО | - 1 | + | | |
| T-Shirt 017 \$0.00 - \$100.00 | Add discount | | Subtotal Discount(s) 😛 | \$15.00 |
| | Remove | Update | Pay \$5.00 | |

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 orderlevel). 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 <u>Offline mode</u> 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 🛨.





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

Note: In offline mode (see <u>Offline mode</u> 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.



| = | Add coupons or discount to th | is order | Order (6 items) | Clear all |
|--|---|--|--|---|
| | Applying coupon codes will clear all previous added disco you apply the coupon codes before adding any discounts. | unts. We recommend | Elite Glove ×1 | \$10.00 |
| 12 | Coupon | | Participant T-Shirt X3 | \$30.00 |
| Apple Watch Nike+ Serie | Bubble | Apply | M | |
| \$399.00 - \$429 | Discussion | | Nike Air Zoom Pegasu ×1 9 | \$100.00 |
| MAIN | 0.00 % off | Apply | Apple Watch Nike+ Ser ×1 | \$429.00 |
| No. 16 | | | 44mm | |
| Pants \$0.00 | | | | |
| | | | | |
| ΤΟ | | | | |
| T-Shirt 017 | | | Subtotal | \$569.00 |
| \$0.00 - \$100.00 | | | Discount(s) | |
| | | | Shipping Fee | \$5.00 |
| | | | Watch Tax \$10 | \$10.00 |
| | | | Pay \$584.00 | |
| | | | | |
| 100000 | | | | |
| = | Add coupons or discount to th | is order | Order (6 items) | Clear all |
| | Add coupons or discount to th Applying coupon codes will clear all previous added disco you apply the coupon codes before adding any discounts. | is order unts. We recommend | Order (6 items) Elite Glove x1 | Clear all \$10.00 |
| = | Add coupons or discount to th Applying coupon codes will clear all previous added disco you apply the coupon codes before adding any discounts. Coupon | is order unts. We recommend | Order (6 items) Elite Glove x1 Participant T-Shirt x3 | Clear all \$10.00 \$30.00 |
| Apje Watch Niket Serie | Add coupons or discount to th Applying coupon codes will clear all previous added disco you apply the coupon codes before adding any discounts. Coupon | is order unts. We recommend Apply | Order (6 items) Elite Glove x1 Participant T-Shirt x3 M | Clear all \$10.00 \$30.00 |
| Aple Watch Niket Serie \$390.00 - \$429 | Add coupons or discount to th Applying coupon codes will clear all previous added disco you apply the coupon codes before adding any discounts. Coupon 5% Off | is order unts. We recommend Apply | Order (6 items) Elite Glove x1 Participant T-Shirt x3 M Nike Air Zoom Pegasu x1 9 | Clear all \$10.00 \$30.00 \$100.00 |
| Apple Watch Nike-1 Serie 5399.00 - \$429 | Add coupons or discount to th Applying coupon codes will clear all previous added disco you apply the coupon codes before adding any discounts. Coupon 5% Off | is order unts. We recommend Apply | Order (6 items) Elite Glove x1 Participant T-Shirt x3 M Nike Air Zoom Pegasu x1 9 Apple Watch Nike+ Ser x1 44mm | Clear all \$10.00 \$30.00 \$100.00 \$429.00 |
| Apple Watch Niket Serie 5399.00 - 5429 Pants | Add coupons or discount to th Applying coupon codes will clear all previous added disco you apply the coupon codes before adding any discounts. Coupon 5% Off Discount | is order unts. We recommend Apply | Order (6 items) Elite Glove x1 Participant T-Shirt x3 M Nike Air Zoom Pegasu x1 9 Apple Watch Nike+ Ser x1 44mm | Clear all \$10.00 \$30.00 \$100.00 \$429.00 |
| Apple Watch Nike+ Serie \$399.00 - \$429 Pants \$0.00 | Add coupons or discount to th Applying coupon codes will clear all previous added disco you apply the coupon codes before adding any discounts. Coupon 5% Off Discount 0.00 % off | is order unts. We recommend Apply Apply | Order (6 items) Elite Glove x1 Participant T-Shirt x3 M Nike Air Zoom Pegasu x1 9 Apple Watch Nike+ Ser x1 44mm | Clear all \$10.00 \$30.00 \$100.00 \$429.00 |
| Apple Watch Niket Serie 399.00- \$429 Pants 50.00 | Add coupons or discount to th Applying coupon codes will clear all previous added disco you apply the coupon codes before adding any discounts. Coupon 5% Off Discount 0.00 % off | is order unts. We recommend Apply Apply | Order (6 items) Elite Glove x1 Participant T-Shirt x3 M Nike Air Zoom Pegasu x1 9 Apple Watch Nike+ Ser x1 44mm | Clear all \$10.00 \$30.00 \$100.00 \$429.00 |
| Apple Watch Niket Serie S399.00- \$429 Pants s0.00 TO | Add coupons or discount to th Applying coupon codes will clear all previous added disco you apply the coupon codes before adding any discounts. Coupon 5% Off Discount 0.00 % off | is order unts. We recommend Apply Apply | Order (6 items) Elite Glove x1 Participant T-Shirt x3 M Nike Air Zoom Pegasu x1 9 Apple Watch Nike+ Ser x1 44mm | Clear all \$10.00 \$30.00 \$100.00 \$429.00 |
| Apple Watch Niket Serie S399.00- \$429 Pants S0.00 T-Shirt 017 S0.00 - \$100.00 | Add coupons or discount to th Applying coupon codes will clear all previous added disco you apply the coupon codes before adding any discounts. Coupon 5% Off Discount 0.00 % off | is order unts. We recommend Apply Apply | Order (6 items) Elite Glove x1 Participant T-Shirt x3 M Nike Air Zoom Pegasu x1 9 Apple Watch Nike+ Ser x1 44mm | Clear all \$10.00 \$30.00 \$100.00 \$429.00 |
| Apple Watch Nike-1 Serie Sy99.00 : \$429 Pants 50.00 TON TShirt 017 50.00 : \$100.00 | Add coupons or discount to th Applying coupon codes will clear all previous added disco you apply the coupon codes before adding any discounts. Coupon 5% Off Discount 0.00 % off | is order unts. We recommend Apply Apply | Order (6 items) Elite Glove ×1 Participant T-Shirt ×3 M Nike Air Zoom Pegasu ×1 9 Apple Watch Nike+ Ser ×1 44mm | Clear all \$10.00 \$30.00 \$100.00 \$429.00 \$429.00 \$569.00 \$\$569.00 |
| Apple Watch Niket Serie 5399.00 : \$429 Pants 50.00 Pants 50.00 TCD TShirt 017 50.00 : \$100.00 | Add coupons or discount to th Applying coupon codes will clear all previous added disco you apply the coupon codes before adding any discounts. Coupon 5% Off Discount 0.00 % off | is order unts. We recommend Apply Apply | Order (6 items) Elite Glove x1 Participant T-Shirt x3 M Nike Air Zoom Pegasu x1 9 Apple Watch Nike+ Ser x1 44mm Subtotal Discount(s) Shipping Fee Watch Tax \$10 | Clear all \$10.00 \$30.00 \$100.00 \$429.00 \$429.00 \$429.00 \$429.00 \$429.00 \$569.00 \$569.00 \$5.00 \$5.00 |
| Apple Watch Niket Serie. 3399.00 - \$429 Pants 50.00 Pants 50.00 TChirt 017 50.00 - \$100.00 | Add coupons or discount to th Applying coupon codes will clear all previous added disco you apply the coupon codes before adding any discounts. Coupon 5% Off Discount 0.00 % off | is order unts. We recommend Apply Apply | Order (6 items) Elite Glove x1 Participant T-Shirt x3 M Nike Air Zoom Pegasu x1 9 Apple Watch Nike+ Ser x1 44mm Subtotal Discount(s) Shipping Fee Watch Tax \$10 Pay \$556.05 | Clear all \$10.00 \$30.00 \$100.00 \$429.00 \$429.00 \$569.00 \$569.00 \$5.00 \$10.00 |

- 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**.



| Ξ | Add coupons or discount to t | his order | Order (6 items) | Clear all |
|-------------------|---|-----------------------------|-------------------------------------|-----------|
| | Applying coupon codes will clear all previous added dis you apply the coupon codes before adding any discoun | counts. We recommend ts. | Elite Glove ×1 | \$10.00 |
| 12 Apple Watch | Coupon | Apply | Participant T-Shirt x3 M | \$30.00 |
| \$399.00 - \$429 | 5% Off | 0 | Nike Air Zoom Pegasu ×1 9 | \$100.00 |
| | Discount | | Apple Watch Nike+ Ser x1 44mm | \$429.00 |
| Pants \$0.00 | 2 % off | Apply | | |
| ТО | | | | |
| T-Shirt 017 | | | Subtotal | \$569.00 |
| | | | Discount(s) | |
| | | | Shipping Fee | \$5.00 |
| | | | Watch Tax \$10 | \$10.00 |
| | | | Pay \$556.05 | |

- 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 **Z**, then:
 - Tap 🖍 to edit the order-level discount.
 - Tap \bigcirc to remove the order-level coupon or discount.



| | Bubble Run - Fort Worth | Q | Ξ | Order (6 items) | Clear all |
|----------------------------------|---|----------------------|------|-------------------------------------|----------------------|
| | | | | Elite Glove ×1 | \$10.00 |
| Apple Watch | Custom Clothor | Nike Air_ | 4 | Participant T-Shirt $\times 3$ M | \$30.00 |
| \$399.00 - \$429 | \$0.00 \$100.00 \$100.00 | \$100.00 | ···· | Nike Air Zoom Pegasu x1 9 | \$100.00 |
| Pants \$0.00 | Participant T- Shirt \$1000 Pocari Sweat \$100 Shoes \$000 | Sports sho \$0.00 | es | Apple Watch Nike+ Ser x1 44mm | \$429.00 |
| ТО | | | | | |
| T-Shirt 017 \$0.00 - \$100.00 | | | | Subtotal Discount(s) | \$569.00 -\$38.77 |
| | | | | Shinning Fee | \$5.00 |
| | | | | Watch Tax \$10 | \$10.00 |
| | | | | Pay \$545.23 | |
| | | | | | |
| = | Add coupons or discount to this | order | - | Order (6 items) | Clear all |
| | Applying coupon codes will clear all previous added discount you apply the coupon codes before adding any discounts. | ts. We recommen | ıd | Elite Glove ×1 | \$10.00 |
| Apple Watch | Coupon | Apply | | Participant T-Shirt x3 M | \$30.00 |
| Nike+ Serie \$399.00 - \$429 | 5% Off | C | | Nike Air Zoom Pegasu x1 9 | \$100.00 |
| | Discount | | | Apple Watch Nike+ Ser x1 44mm | \$429.00 |
| Pants | 2% OFF 🖍 | | | | |
| TO | | | | | |
| T-Shirt 017 \$0.00 - \$100.00 | | | | Subtotal | \$569.00 |
| | | | | Discount(s) | |
| | | | | Shipping Fee | \$5.00 |
| | | | | Watch Tax \$10 | \$10.00 |
| | | | | Pay \$545.23 | |
| | | | | | |

Applying an item-level discount

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



| | Bubble Run - Fort Worth | Q | Ð | Order (6 items) | Clear all |
|---|---|-----------------------|----|-------------------------------------|-----------|
| | | | | Elite Glove ×1 | \$10.00 |
| 12 Apple Watch | Custom Herschel | Nike Air_ | 4 | Participant T-Shirt x3 M | \$30.00 |
| Ni <mark>ke+ Seřie</mark> \$399.00 - \$429 | Clothes Elite Glove Cruz POS \$0.00 \$10.00 \$100.00 | Zoom Pega \$100.00 | a | Nike Air Zoom Pegasu x1 9 | \$100.00 |
| Pants \$0.00 | Participant T- Shirt S10.00 | Sports sho \$0.00 | es | Apple Watch Nike+ Ser ×1 44mm | \$429.00 |
| TO T-Shirt 017 | | | | | ¢500.00 |
| \$0.00 - \$100.00 | | | | | \$569.00 |
| | | | | | |
| | | | | Shipping Fee | \$5.00 |
| | | | | Pay \$545.23 | |

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

2. Tap + Add discount.

| | Participant T-Shirt | | Order (6 items) | Clear all |
|----------------------------------|--|---|-------------------------------------|-------------------|
| | From Hopkinton to Wellesley to Newton to Boy of America's oldest traditions. You've run Bosto | rlston, you took part in one on. That's worth showing off. | Elite Glove ×1 | \$10.00 |
| 12 Apple Watch | \$10.00 | | Participant T-Shirt x3 M | \$30.00 |
| Nike+ Serie \$399.00 - \$429 | S M | | Nike Air Zoom Pegasu x1 9 | \$100.00 |
| and | XL 2XL | 3XL | Apple Watch Nike+ Ser ×1 44mm | \$429.00 |
| Pants \$0.00 | | | | |
| ТО | - 3 | + | | |
| T-Shirt 017 \$0.00 - \$100.00 | | | Subtotal | \$569.00 |
| | Add discount | | Discount(s) 🧪 | |
| | | | Shipping Fee Watch Tax \$10 | \$5.00 \$10.00 |
| | Remove | Update | Pay \$545.23 | |

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.



| 12 | _ | 3 | + | | |
|--|--------|---|-----------------------|--------------------------------|----------------------|
| Apple Watch Nike+ Serie \$399.00 - \$429 | 1 | | \$ off % off | Subtotal Discount(s) 🥕 | \$569.00 -\$38.77 |
| ann | | | | Shipping Fee Watch Tax \$10 | \$5.00 \$10.00 |
| Pants | Remove | | Update | Pay \$545 | .23 |



Note:



- 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

| Ξ | Participant T-Shirt | | Order (6 items) | Clear all |
|--------------------------------|--|---|----------------------------------|----------------------|
| | From Hopkinton to Wellesley to Newton to Boylstor of America's oldest traditions. You've run Boston. Th | n, you took part in one nat's worth showing off. | Elite Glove ×1 | \$10.00 |
| 12 Apple Watch | \$10.00 | | Participant T-Shirt x3 | \$30.00 |
| Nike+Serie \$399.00 - \$429 | s M | | Nike Air Zoom Pegasu x1 9 | \$100.00 |
| Pants \$0.00 | | JAL | Apple Watch Nike+ Ser ×1 44mm | \$429.00 |
| TO T-Shirt 017 | - 3 | + | | |
| \$0.00 - \$100.00 | \$10FF | | Subtotal Discount(s) 🧪 | \$569.00 -\$41.77 |
| | | | Shipping Fee Watch Tax \$10 | \$5.00 \$10.00 |
| | Remove | Update | Pay \$542.23 | |

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.



| ≡ | Participant T-Shirt | Order (6 items) | Clear all |
|---------------------------------|--|--------------------------------|-------------------|
| | From Hopkinton to Wellesley to Newton to Boylston, you took part in of America's oldest traditions. You've run Boston. That's worth showin | one Ig off. Elite Glove x1 | \$10.00 |
| 12 | \$10.00 | Participant T-Shirt ×3 M | \$30.00 |
| Nike+ Serie \$399.00 - \$429 | S M L | Nike Air Zoom Pegasu x1 | \$100.00 |
| A MARIN | XL 2XL 3XL | 9 Apple Watch Niket Ser1 | \$429.00 |
| | | 44mm | φ+23.00 |
| \$0.00 | | | |
| ТО | | | |
| T-Shirt 017 | - з т | Subtotal | \$569.00 |
| 30.00 - 3100.00 | Add discount | Discount(s) 🧪 | |
| | | Shipping Fee Watch Tax \$10 | \$5.00 \$10.00 |
| | Remove Update | Pay \$545.23 | |

- 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**.



| Ξ. | Bubble Run - Fort Worth | Q [] | Order (6 items) | Clear all |
|-------------------|--|--------------|-----------------------------|-----------------------|
| *** | | | \$10.00 | Remove |
| 12 Apple Watch | Custom Clather | Nike Air | Participant T-Shirt x3 M | \$30.00 |
| \$399.00 - \$429 | \$0.00 \$10.00 \$100.00 | \$100.00 | Nike Air Zoom Pegas 9 | u ×1 \$100.00 |
| Pants | Participant T- Shirt Pocari Sweat Shoes | Sports shoes | Apple Watch Nike+ S 44mm | er x1 \$429.00 |
| TO | \$10.00 \$0.00 | \$0.00 | | |
| T-Shirt 017 | | | Subtotal | \$569.00 |
| | | | Discount(s) 🧪 | |
| | | | Shipping Fee | \$5.00 |
| | | | Watch Tax \$10 | \$10.00 |
| | | | Pay \$54 | 2.23 |

• 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.





Checking out

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



| | Bubble Run - Fort Worth | Q | Э | Order (6 items) | Clear all |
|----------------------------------|---|-----------------------|----|---|--------------------|
| 12 Apple Watch Nike+ Serie | Custom Clothes Elite Glove | Nike Air Zoom Pega | 4 | Elite Glove x1 Participant T-Shirt x3 M | \$10.00 \$30.00 |
| \$399.00 - \$429 | \$10.00 \$100.00 | \$100.00 | - | Nike Air Zoom Pegasu X1 9 | \$100.00 |
| Pants \$0.00 | Participant T- Shirt Shioo Shoes Shoes Shoes Shoes | Sports sho \$0.00 | es | Apple Watch Nike+ Ser x1 44mm | \$429.00 |
| ТО | | | | | |
| T-Shirt 017 \$0.00 - \$100.00 | | | | Subtotal | \$569.00 |
| | | | | Discount(s) 🧨 | -\$41.77 |
| | | | | Shipping Fee Watch Tax \$10 | \$5.00 \$10.00 |
| | | | | Pay \$542.23 | |
| × | | | 4 | Total 6 items | e |
| | Credit card | Cash | | | |
| Name on ca | ırd * | | We | e accept the following card types: | |
| Card numbe | er* | | | | |
| | | | | | |

Verifie of Card

Card number•

Card number•

Expiration date •

CVV/CVC• ?

MM / YYYY

Email

example@mail.com

We accept the following card types:

Image: Comparison of the provide the providet the providet the provide the provide the provi

Paying with credit cards (online)

To process credit card payments when the network is connected:



- 1. Tap Credit card (selected by default) and provide the card information by one of the following:
 - Manually enter the card information.
 - Tap o to scan the card number and expiration date, and then enter the cardholder's name and CVV/CVC number.
 - Swipe the card (magnetic-stripe card only) through the connected MagTek card reader.

| × | | Total 6 items Continue |
|--|-------------|---|
| | Credit card | Cash |
| Name on card * | | We accept the following card types: |
| Card number * | | |
| 5424 0000 0000 0015 Expiration date • | ■ 0 | ••• |
| 11/2022 | 123 | |
| Email pos.demo@activenet | work.com | Enter an email address to receive e-receipt |

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



| | | Total 6 items \$542.23 | |
|--------------------------|--|--------------------------------|--------|
| | Credit card | D | |
| Name on card * | The order is being processed Please do not leave this scree | We accept the follow | |
| Card number * | | | |
| 5424 0000 0000 0015 | D | | |
| Expiration date * | CVV/CVC* 🕜 | | |
| | | | |
| Email pos.demo@activenet | work.com | n email address to receive e-n | eceipt |

4. On the **Please sign here** popup, request the customer to sign his or her signature to authorize the payment. Then tap **Continue** to complete the order.

| | | Total 6 items Cont | |
|------------------------|---|-----------------------------|--|
| | Please sign here | Clear | |
| | | , (| |
| POS DEMO | athy 1 | /J. | |
| Card number 5424 0000 | ð | | |
| Expiration da | Collect e-signature authorize the payment | nt. | |
| Email example@mail.com | Enter an email ad | Idress to receive e-receipt | |



| Credit card | S | Cash | | |
|-------------|-----------|------|--------------|------|
| (| 2 | | | |
| Order o | | | VISA 🤲 ASSES | |
| | sompreteu | | | |
| | | | | «««« |
| //CVC* 🕐 | | | | |
| | | | | |
| | | | | |

Paying with 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:

| 4:02 PM Tue Aug 13 | | OFFLINE MODE | | 🗢 20% 💽 |
|---------------------------------|---|---|----------------------------------|-------------------|
| | Apple Watch Nike+ Series 4 (| GPS) with Nike Sport Band | Order (6 items) | Clear all |
| | Apple Watch Nike+ has been redesig athlete. Featuring a screen that goes \$429.00 | gned to help make you a better nearly edge to edge, you can easily | Apple Watch Nike+ Ser x1 44mm | \$429.00 |
| Apple Watch | 40mm 44 | łmm | Elite Glove ×1 | \$10.00 |
| Nike+ Serie \$399.00 - \$429 | | | Nike Air Zoom Pegasu x1 9 | \$ 100.00 |
| Panto | | | Participant T-Shirt ×3 | % \$30.00 |
| \$0.00 TO | _ | 1 + | | |
| T-Shirt 017 | Converted_5% Off \$21.45 OFF | 0 | Subtotal | \$569.00 |
| \$0.00 - \$100.00 | Add discount | | Discount(s) | -\$41.77 |
| | | | Shipping Fee Watch Tax \$10 | \$5.00 \$10.00 |
| | Remove | Update | Pay \$542.23 | |



To process credit card payments while offline (only swiped card payments are accepted, see <u>Offline</u> <u>mode</u> 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 (including scanning by camera) is disabled.
 - Verify the cardholder's name and the card expiration date before swiping the card.

| 4:04 PM Tue Aug 13 | OFFLINE | MODE | | 🗢 19% 🍋 |
|-----------------------|-----------------|--------------------|---------------------------|------------|
| × | | - | Total 6 items \$542.23 | Continue |
| | Credit card | Cash | | |
| ((mmigrind) | | W | e accept the following o | ard types: |
| Court Hinesteen 7 | Swipe card only | | | ' |
| Engendoen ender" | | | | č |
| Email example@mail.co | m | Enter an email add | ress to receive e-receip | ot |

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**.



| 17:18 Mon Aug 19 | OFFLINE | MODE | | 17% 🌅 |
|--------------------------|-------------|--------------------------|-------------------------------|---------------|
| | | | Total 6 items \$542.23 | |
| | Credit card | Cash eceive e-receipt | ccept the followin | g card types: |
| | No, thanks | Continue | | |
| | | | | j ž |
| Email example 8 mail.com | | Enter an email a | iddress to receive e-rec | eipt |

3. On the **Please sign here** popup, request the customer to sign his or her 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.

| 7:18 Mon Aug 19 | OFFLINE MODE | 17% 🔳 |
|-----------------|---|---------------|
| | Total 6 items \$542.23 | |
| - | Please sign here Clear | _ |
| | Kathy W. | ypes: O Me |
| | Collect e-signature to authorize the payment. | |
| | | |
| Email | Enter an email address to receive e-receipt | |



| 17:18 | Mon Aug 19 | OFFLINE MODE | | | | 17% 🔲 |
|-------|------------|--------------|------------------|---------------------------|-------------|-------|
| | | | | Total 6 items \$542.23 | | |
| | | Credit card | Cash | | | |
| | | Order Saved | | We accept the following o | card types: | |
| | | | | | ľ ž | |
| | Email | | Enter an email a | ddress to receive e-recei | | |

Paying with cash

To process cash payments, on the payment screen:

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



| × | | | ^{Total} \$542 | 6 items 2.23 Continue | |
|-------|------------------|------------------------------|-------------------------------|--------------------------|--|
| | | Credit card | Cash | | |
| | | Cash received * \$ 600.00 | | | |
| | | Change due \$57.77 | | | |
| Email | pos.demo@activen | etwork.com | Enter an email address to re- | ceive e-receipt | |

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

| × | | | |
|---------------------------|---------------------------------------|------------------------------|------|
| | Credit card | | |
| | Cash received * Change due \$57.77 OK | | |
| | Change due \$57.77 | | |
| Email example@mail | .com Enter an em | ail address to receive e-rec | eipt |



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 \equiv menu icon on the upper left.
- 2. In the navigation pane, tap **Order history**.



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

| 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



 \circ C: Pending sync

• • • Failed to sync (including expired orders and failed orders)

| = | | Order hist | tory | | C Syncing Q |
|---|--------------------------|---------------------------------|-----------------|--------------------------|--|
| Only local orders processed on thi | is device are displayed. | Unsynced orders can | only be synched | I when the cashier who p | processed the order is signed in. |
| Date range | Cashiers | | Payment me | thods | Sync status |
| 09/28/2021 - 09/30/2021 🔇 | E All | \checkmark | All | ~ | Completed, Pending 🗸 🗸 |
| Total amount \$999,999,999,999 (999 orders) | 99.00 | Pending : \$1379 (2 order | sync .99 | | Failed to sync \$336.39 (2 orders) |
| Time | Amount | Cashier | | Payment method | Order number |
| C 09/28/2021 11:15 AM | \$300.00 | Alexander Hunter | | Credit card | C-5B89556DL1TK |
| O9/28/2021 12:36 AM | \$150.00 | Alexander Hunter | | Cash | |
| O9/28/2021 13:48 AM | \$929.99 | Alexander Hunter | | Credit card | C-d5d8451fd518d2TK |
| | \$236.50 | Alexander Hunter | | Cash | C-54sdf815dL1TK |
| ● 09/28/2021 14:12 AM | \$99.89 | Alexander Hunter | | Cash | C-2dsa321f1TK |
| ▲ 09/28/2021 15:49 AM | \$199.89 | Alexander Hunter | | Cash | |
| There may be a | a delay up to 15 minu | ites before changes | will be reflect | ed on registrations a | nd net income. |

- 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 \bigcirc icon and then enter the order number:



| ← | Search orders |
|---|---|
| | |
| | |
| | |
| | Search for an order in this event by entering an order number (if you are in online mode |
| | then the search includes orders processed on other devices): |
| | Order # example: C 1224567890 |
| | View |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | There may be a delay up to 15 minutes before changes will be reflected on registrations and net income. |

- 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.



• Completed order (cash payment):

| Order # C-5B8T8XJTS2W \$542.23 (Total 6 items) | | | receipt sent to | 07/18/2019 3:05 PM Cashier: John Do Payment method: Casl p: pos.demo@activenetwork.com |
|---|----------------------|----------------------|-----------------|---|
| ltem name | Price | | Discount | Tota |
| Elite Glove | \$10.00 ×1 | 2% OFF | -\$0.20 | \$9.8(|
| Participant T-Shirt | \$10.00 | Coupon for bubble ru | -\$1.50 | \$24.9 |
| Μ | x3 | 2% OFF | -\$0.57 | |
| | | \$1.00 OFF | -\$3.00 | |
| Nike Air Zoom Pegasus 35 | \$100.00 | Coupon for bubble ru | -\$5.00 | \$93.10 |
| 8 | ×1 | 2% OFF | -\$1.90 | |
| Apple Watch Nike+ Series 4 (GPS) with | \$429.00 | Coupon for bubble ru | -\$21.45 | \$399.40 |
| Nike Sport Band | ×1 | 2% OFF | -\$8.15 | |
| 44mm | | | | |
| | | | | Culture (5070) |

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

| Order details on this pa To see the latest ord Newly created orde | ge may be out of date. er details, reopen this order w rs may require up to 15 mins a | with the app in online mode. after syncing to be updated. | | |
|---|---|--|---------------------------------|------------------------------|
| Order # | | | 01/18/2 Cashier | 2021 11:15AI : Gray, Davi |
| \$66.89 | | | Payment method: Credit card * | ***1234, Vis |
| (lotal 6 items) | | | E-receipt sent to: abc.tord@goo | CAPTURE |
| ltem name | Price | | Discount | Tota |
| Stoneware Coffee cup | \$6.99 | Itemdiscount \$50FF | -\$2.00 | \$2.0 |
| Red, M | ×1 | Coupon for new | -\$2.00 | |
| | | Itemdiscount \$50FF | -\$1.00 | |
| | | Coupon for second | -\$2.00 | |
| Seattle Seahawks | \$13.98 | Itemdiscount \$50FF | -\$2.00 | \$23.9 |
| Green, L | x2 | Coupon for new | -\$2.00 | |
| Cola | \$1.98 | | | \$2.9 |
| | x2 | | | |
| lssue refund | | | Subtotal | \$28.9 |
| issue returnu | | | Surcharge A | \$2.0 |
| Refunds cannot be issued in offline mode, pl | ease try again after the internet is | re-connected. | Surcharge B | \$2.0 |



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

| ÷ | Failed | | |
|--|----------------------|---|---|
| Order # C-5B8T8TVGX \$12.50 (Total 1 item) | Transaction failed | 07/0 Cashier: E Payment method: C E-re | 1/2019 2:26 PM ddie WavierEU1 redit/debit card eceipt sent to: |
| ltem name | Price | Discount | Total |
| T-Shirt 017 Small | \$10.00 ×1 | | \$10.00 |
| | | Subtotal | \$10.00 |
| | | Grand total | \$12.50 |
| | | | |

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



| - | Failed | | |
|-------------------------------------|--|---|---|
| | nsaction expired. Offline transaction failed t | o be uploaded within 72 hours. | |
| \$56.00 (Total 11 Items) | | 09/0 Cashier: E Payment method: C E-re | 4/2019 4:50 PM ddie WavierEU1 redit/debit card sceipt sent to: |
| ltem name | Price | Discount | Total |
| Elite Glove | \$10.00 ×5 | | \$50.00 |
| Pocari Sweat | \$1.00 ×6 | | \$6.00 |
| | | Subtotal | \$56.00 |
| | | Grand total | \$56.00 |

• Pending sync order:

| :41 Wed Jun 8 | | OFFLINE MODE | | | 111 🗢 100% 🗖 |
|---|---------------------------------------|---------------------|-------------|----------------------|---------------------|
| | | | | | |
| ← Order # | | | | 01/18/ | 2021 11:15AM |
| | | | | Cashier | r: Gray, David |
| \$66.89 | | | Payment n | nethod: Credit card | ****1234, Visa |
| (Total 6 items) | | | E-receipt s | ent to: abc.ford@goo | oglemail.com |
| | | | | SIGNATURE | CAPTURED |
| Item name | Price | 3 | Discount | | Total |
| Stonoware Coffee cup | \$6.99 | Itomdiscount \$50EE | \$2.00 | | \$2.00 |
| Red M | \$0.55 x1 | Coupon for new | -\$2.00 | | \$2.00 |
| 1100,00 | | Itemdiscount \$50FF | -\$1.00 | | |
| | | Coupon for second | -\$2.00 | | |
| | | | | | |
| Seattle Seahawks | \$13.98 | Itemdiscount \$50FF | -\$2.00 | | \$23.96 |
| Green, L | x2 | Coupon for new | -\$2.00 | | |
| Cola | \$1.98 | | | | \$2.96 |
| | ×2 | | | | |
| | | | | Subtotal | \$28.92 |
| | | | | Surcharge A | \$2.00 |
| | | | | Surcharge B | \$2.00 |
| | | | | Processing fee | \$1.00 |
| Issue refund | | | | Grand total | \$33.92 |
| Refunds cannot be issued in offline mode, ple | ase try again after the internet is r | e-connected. | | | 187. 197 |

• Payment processing order:



| 9:41 AM Tue Oct 30th | | OFFLINE MODE | | ull 🗢 100% 📖 | |
|----------------------|--------------------|---------------------|------------------------------|---------------------|--|
| ÷ | Payment processing | | | | |
| \$66.89 | | | | 18/2021 11:15AM | |
| (Total 6 items) | | | Cas | hier: Gray, David | |
| | | | verified) Payment method: (| Credit/debit card | |
| | | | E-receipt sent to: abc.ford@ | googlemail.com | |
| | | | SIGNATU | JRE CAPTURED | |
| Item name | Price | | Discount | Total | |
| Stoneware Coffee cup | \$6.99 | Itemdiscount \$50FF | -\$2.00 | \$2.00 | |
| Red, M | ×1 | Coupon for new | -\$2.00 | | |
| | | Itemdiscount \$50FF | -\$1.00 | | |
| | | Coupon for second | -\$2.00 | | |
| Seattle Seahawks | \$13.98 | Itemdiscount \$50FF | -\$2.00 | \$23.96 | |
| Green, L | x2 | Coupon for new | -\$2.00 | | |
| Cola | \$1.98 | | | \$2.96 | |
| | x2 | | | | |
| | | | Subtotal | \$28.92 | |
| | | | Surcharge A | \$2.00 | |
| | | | Surcharge B | \$2.00 | |
| | | | Processing fee | \$1.00 | |
| | | | Grand total | \$33.92 | |
| | | | | | |



Refunding an order

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

Note:

- Except for orders paid in cash, refunds cannot be issued in offline mode or for an unsynced order.
- An order cannot be refunded within 15 minutes after it was created. The **Issue Refund** button is greyed-out for a newly created order.
- For pending or failed orders, the **Issue Refund** button is hidden.
- The Issue Refund button is only displayed when in the online mode.
- 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 \equiv 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).

| = | Order history C Syn | | | | |
|---|---------------------------------------|--------------------------------------|-----------------------------------|--|--|
| Only local orders processed on this device | ce are displayed. Unsynced orders can | only be synched when the cashier who | processed the order is signed in. | | |
| Date range | Cashiers | Payment methods | Sync status | | |
| 09/28/2021 - 09/30/2021 🙁 🖬 | All 🗸 | All 🗸 | Completed, Pending 🗸 🗸 | | |
| Total amount | Pending | sync | Failed to sync | | |
| \$999,999,999,999.0 ^(999 orders) | 00 \$1379 (2 orde | 9.99 | \$336.39 (2 orders) | | |
| Time Amou | nt Cashier | Payment method | Order number | | |
| C 09/28/2021 11:15 AM \$300. | 00 Alexander Hunte | er Credit card | C-5B89556DL1TK | | |
| C 09/28/2021 12:36 AM \$150.0 | 00 Alexander Hunte | er Cash | | | |
| C 09/28/2021 13:48 AM \$929. | 99 Alexander Hunte | er Credit card | C-d5d8451fd518d2TK | | |
| ▲ 09/28/2021 13:59 AM \$236. | 50 Alexander Hunte | er Cash | C-54sdf815dL1TK | | |
| • 09/28/2021 14:12 AM \$99.8 | 9 Alexander Hunte | er Cash | C-2dsa321f1TK | | |
| 09/28/2021 15:49 AM \$199.8 | 39 Alexander Hunte | er Cash | | | |
| There may be a dela | y up to 15 minutes before change | s will be reflected on registrations | and net income. | | |

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

| 2/2020, 3:05 PM hier: ent method: Cash receipt sent to: | 11/12) Cashi Paymen E-re | Order # C-5B8TB8LKDVH \$1.00 (Total 1 item) | | er # C-5B8TB8LKDVH OO 1item) | |
|--|-----------------------------------|---|---------|------------------------------------|--|
| Total | Discount | Price | em name | | |
| \$1.00 | | \$1.00 ×1 | est - 1 | | |
| \$1.00 | Subtotal | | | | |
| \$1.00 | Grand total | | | | |
| | | | | | |
| | | | | | |
| | | | | | |

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:

| 10:53 Wed | Nov 18 | | | | | 奈 90% ■ |
|-----------|--|-----------------------------|-------------------|-----------------|-------|-----------------------|
| ← | Issue refund | | | | | |
| | Select items to refund a | and check the total refun | d amount | | | |
| | | | | | | |
| | Item name | Price | Refund amount | Refund quantity | | Subtotal |
| | test - 1 | \$1.00 ×1 | \$ 1.00 | • 1 | • | \$1.00 |
| | | | | | Total | \$1.00 |
| | The POS app can only is Payment type: Cash Refund reason | isue a refund to the origin | al payment method | | | |
| | | | | | | 0/200 |
| | | | | | | |



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**.

| ≡ | Order hi | C Syncing Q | |
|--|----------------------------------|---------------------------------------|--|
| Only local orders processed on this device | ce are displayed. | | |
| Date range | Cashiers | Payment methods | Sync status |
| 09/28/2021 - 09/30/2021 🛞 🛅 | All 🗸 | All 🗸 | Completed, Pending 🗸 🗸 |
| Total amount \$999,999,999,999,00 | Pending \$137 (2 ord) | g sync 9.99 ers) | Failed to sync \$336.39 (2 orders) |
| Time Amou | nt Cashier | Payment method | Order number |
| C 09/28/2021 11:15 AM \$300. | 00 Alexander Hunt | er Credit card | C-5B89556DL1TK |
| C 09/28/2021 12:36 AM \$150.0 | 00 Alexander Hunt | er Cash | |
| C 09/28/2021 13:48 AM \$929. | 99 Alexander Hunt | er Credit card | C-d5d8451fd518d2TK |
| ▲ 09/28/2021 13:59 AM \$236. | 50 Alexander Hunt | er Cash | C-54sdf815dL1T |
| ▲ 09/28/2021 14:12 AM \$99.8 | 9 Alexander Hunt | er Cash | C-2dsa321f1TK |
| ▲ 09/28/2021 15:49 AM \$199.8 | 39 Alexander Hunt | er Cash | |
| There may be a dela | y up to 15 minutes before change | es will be reflected on registrations | and net income. |

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 \equiv 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.



| Order # C-5B8TGBL This order already has multiple \$66.89 | 1TTK Refunded refunds. | | Payment n E-receipt s | 01/18/ Cashier nethod: Credit card ent to: abc.ford@goo | 2019 11:15A1 r: Gray, Davi ****1234, Vis oglemail.cor |
|---|----------------------------------|---|--------------------------------|--|--|
| (Total 6 items) | | | | SIGNATURE | E CAPTURE |
| em name | Price | | Discount | | Tota |
| toneware Coffee cup | \$6.99 | Itemdiscount \$50FF | -\$2.00 | | \$2.0 |
| ed, M | ×1 | Coupon for new | -\$2.00 | | |
| | | Itemdiscount \$50FF | -\$1.00 | | |
| | | Coupon for second | -\$2.00 | | |
| | | | • R | efunded Qty: 2, Refunded | amount: -\$1.98 |
| eattle Seahawks | \$13.98 | Itemdiscount \$50FF | -\$2.00 | | \$23.9 |
| ireen, L | x2 | Coupon for new | -\$2.00 | | |
| | | | 0 R | efunded Qty: 2, Refunded | amount: -\$1.98 |
| Cola | \$1.98 | | | | \$2.9 |
| | ×2 | | | | |
| | | | () R | efunded Qty: 2, Refunded | amount: -\$1.94 |
| | | | | Subtotal | \$28.9 |
| | | | | Surcharge A | \$2.0 |
| | | | | Refunded amount | -\$1.0 |
| | | | | Surcharge B | \$2.0 |
| | | | | Processing fee | \$1.0 |
| | | | | Crond tot-1 | ¢22.0 |
| | | | | Grand total | \$33.9 |
| | | | (| D Total refunded | -\$3.9 |
| | Ref | und reason: Cras lectus sce scelerisque litora hac | lerisque prin : consequat l | nis volutpat suspend nabitasse phasellus | lisse vivamu suspendisse |

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.



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-oniDynamo?searchIn=allTypes



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:

| SECURITY FROM THE INSIDE |
|--------------------------|
| Username |
| Password |
| Customer Code |
| LOGIN |
| |

4. Tap the \equiv icon:

| 6:46 🖿 | হ: 🛋 98% 💼 |
|------------------------|------------|
| \equiv Reader Config | |
| Reader ID : | |
| Firmware : | |
| Serial Number : | |
| Interface Type : | USB |
| Security Level : | |
| DUKPT KSN : | |
| DECET | |
| RESET | CLEAR |
| CHANGE | OPTIONS |

5. Tap Card Reader:



| Reader Configuration Program | | | |
|------------------------------|----------------------|--|--|
| TRAN | TRANSACTIONS | | |
| | Change Reader Config | | |
| ٩ | Change Keys | | |
| ► | Scripts | | |
| ↔ | Send Command | | |
| REPO | REPORTS | | |
| | Transaction Log | | |
| ADMI | IN | | |
| <u>.</u> | User Info | | |
| | Passcode Lock | | |
| \square | Card Reader 🧲 | | |
| ē | Print Settings | | |
| ? | Help | | |

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

| 6:46 🖬 | ≅.⊿l 98% ≜ | |
|----------------------|--------------------|--|
| \equiv Card Reader | | |
| AUDIO | | |
| O uDynamo | | |
| Update Audio Config | Clear Audio Config | |
| Bluetooth/BLE | | |
| O eDynamo | | |
| O DynaMAX | | |
| USB | | |
| 💿 USB Reader 🛛 🗲 | | |

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



| Reader Configuration Program | | | |
|------------------------------|----------------------|--|--|
| TRAN | ISACTIONS | | |
| | Change Reader Config | | |
| ٩ | Change Keys 🛛 🗲 | | |
| ► | Scripts | | |
| ←→ | Send Command | | |
| REPO | REPORTS | | |
| | Transaction Log | | |
| ADMIN | | | |
| | User Info | | |
| | Passcode Lock | | |
| | Card Reader | | |
| ē | Print Settings | | |
| ? | Help | | |

8. Tap the + icon:



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



10. Tap the **KEYS** button:



| 6:47 🖬 | হি: 📶 97% 🗎 | | | |
|--|----------------------|--|--|--|
| 😑 Change Keys | s X | | | |
| Reader ID : | N/A | | | |
| Firmware : | 21043019A01 | | | |
| Serial Number : | B1365BE112012AA | | | |
| Interface Type : | USB | | | |
| Security Level : | 03 | | | |
| DUKPT KSN : | 9011880B1365BE000001 | | | |
| RESET | CLEAR | | | |
| KEYS 🗲 | | | | |
| [000100] -> 000B3231303433303139413031 [1500] -> 000103 [000103] -> 000F423133363542453131323031324141 [0900] -> 000A9011880B1365BE000001 | | | | |

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

| Key Injection | | |
|--------------------------|--------|--|
| Current Key | | |
| Default Magensa Key 🧲 | | |
| Default Magensa Key PINP | AD | |
| MAGENSA PROD UIK | | |
| | CANCEL | |

12. Tap CONTINUE:

| Billing | | |
|---|--------|----------|
| Are you sure you want to continue? This is a billable event. | | |
| | CANCEL | CONTINUE |

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





14. Wait for the key to update:

| 😑 Change Keys | , × | | | |
|--|----------------------|--|--|--|
| Reader ID : | N/A | | | |
| Firmware : | 21043019A01 | | | |
| Serial Number : | B1365BE112012AA | | | |
| Interface Type : | | | | |
| Security Level : | | | | |
| DUKPT KSN : | 9011880B1365BE000001 | | | |
| Updating key, please wait [000100] -> 000B3231303433303139413031 [1500] -> 000103 [000103] | | | | |
| -> 000F423133363542453131323031324141 [0900] -> 000A9011880B1365BE000001 [1900] -> 0024423133363542453131323031324141004D5 3434B505244303031EB3B39EFCC80C896CFE4 [223142313336354245313132303132414100019 011880B1365BE000000F08A92F09BA37F27D196 92FE32570F5763E904AD37C1] | | | | |

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

Success

The key Default Magensa Key has been loaded successfully.

ОК

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