

ACTIVE POS 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 <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)
 (https://www.magtek.com/product/idynamo)
 - MagTek iDynamo 6 Lightning Secure Card Reader (Magtek PN: 21087016)
 (https://www.magtek.com/product/idynamo-6)
- For Samsung Galaxy S4 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: 21087019) (https://www.magtek.com/product/idynamo-6)

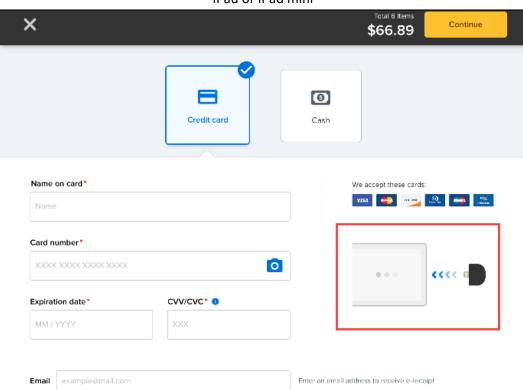
If the card reader was purchased:

• 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

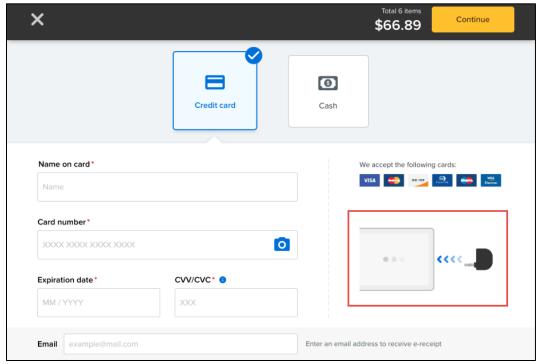
Before a card reader is plugged in, the POS checkout screens on iPad/iPad mini and Samsung Galaxy S4 tablets display different card reader installation instructions:



iPad or iPad mini



Samsung Galaxy S4



To install a card reader on the mobile POS device:

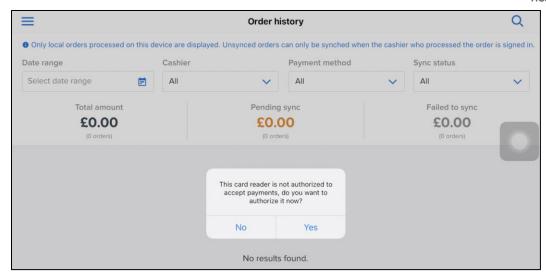
- For Apple iPad devices: plug the card reader into the Lightning port.
- For Samsung Galaxy S4 tablets, if the card reader is a:
 - MagTek uDynamo Audio Jack Swipe Card Reader, then plug the card reader into the headphone socket.
 - MagTek iDynamo 6 USB-C Secure Card Reader, then plug the card reader into the USB-C socket.



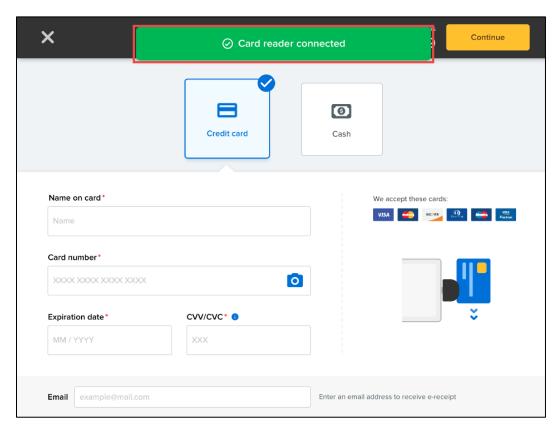


On first connection to the mobile POS device, you must register the card reader with the POS app (unregistered card readers cannot accept payments):





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



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 clientcare@activenetwork.com)
- 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> 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.

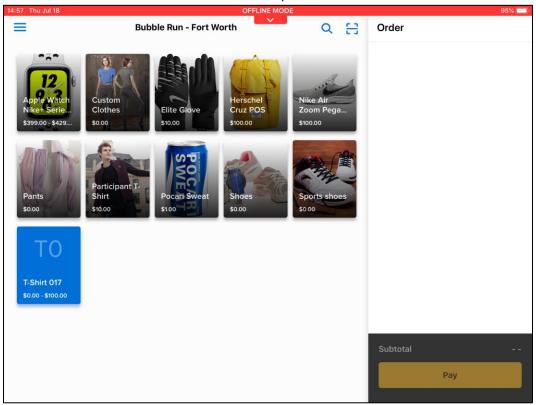


Offline mode

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.

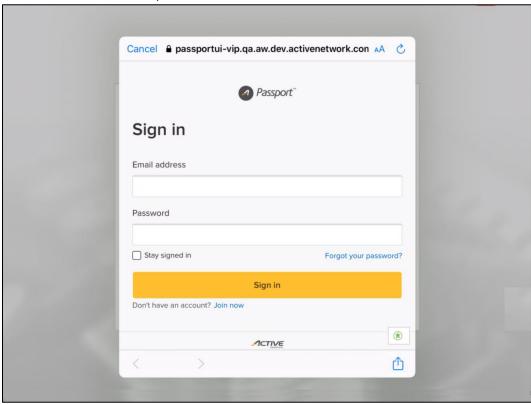


Selling items with ACTIVE POS

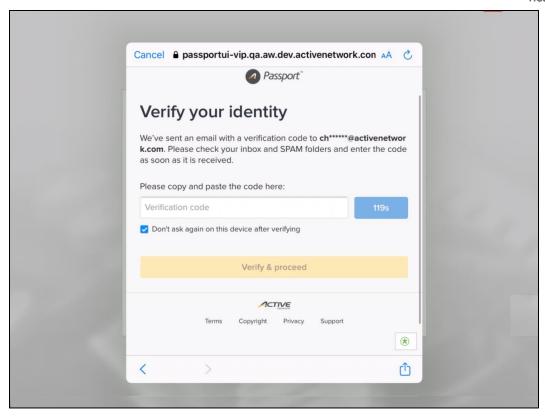
Signing in and selecting an event

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:

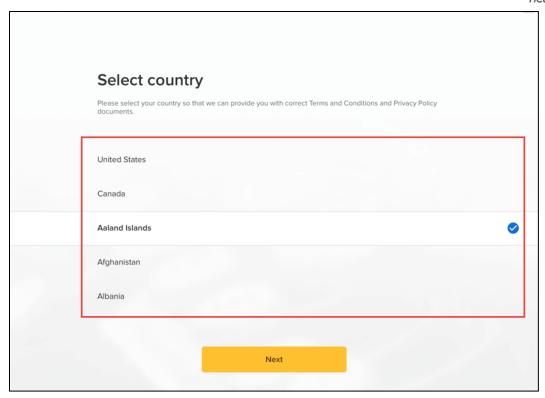


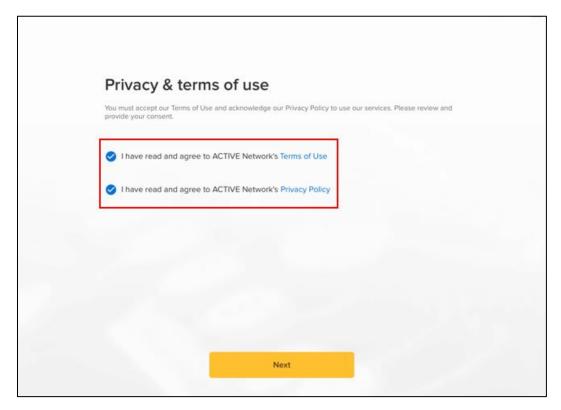




2. (optional) For GDPR-compliant agencies where users must sign or re-sign the ACTIVE Terms of Use and Privacy Policy waivers, the **Select country** screen is displayed. Tap your country or region and then tick the waivers.

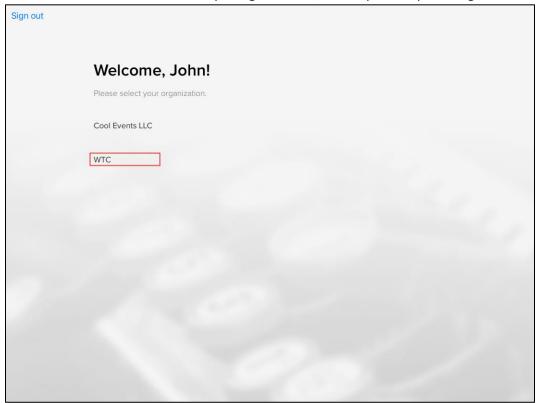




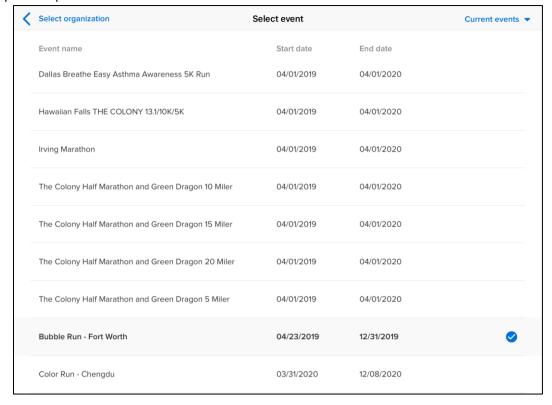




3. If your account is associated with multiple organizations, then tap the required organization.

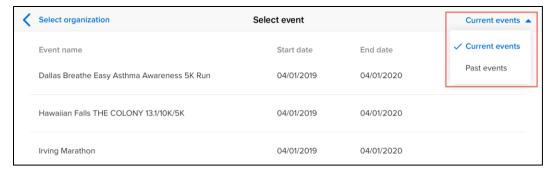


4. Tap the required event.

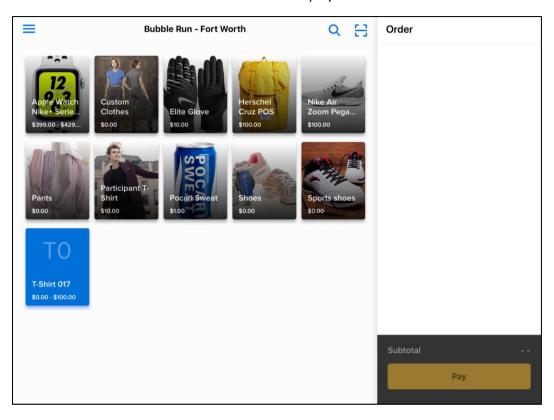


If you need to select a past event, then tap **Current events > Past events**.





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:

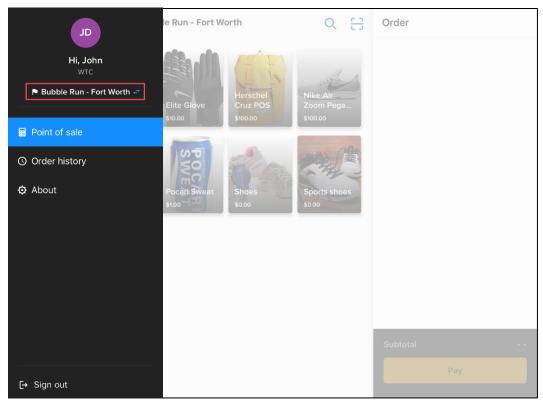
1. Tap the ≡ menu icon on the upper left.



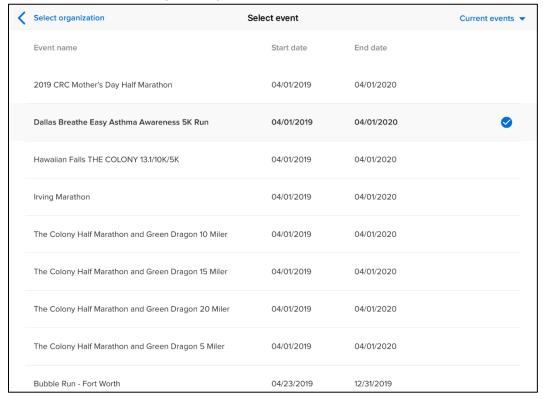
2. In the navigation pane, tap the current event.

Note: Changing to another event will remove all items in the current **Order**.



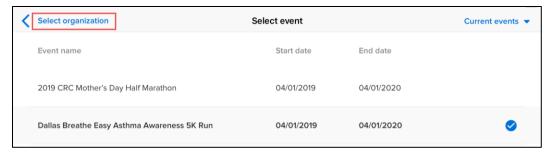


3. On the **Select event** screen, tap the required event.



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.

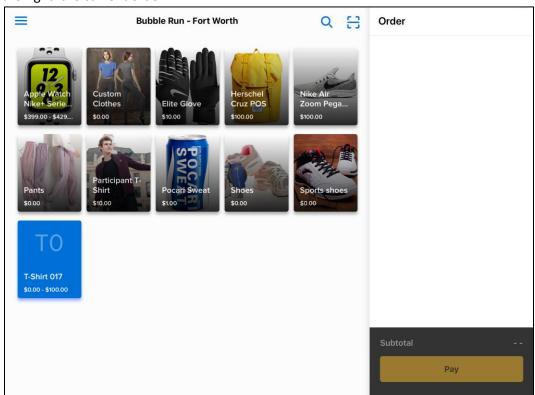




Adding items to the order

The main merchandise sales screen is divided into two sections:

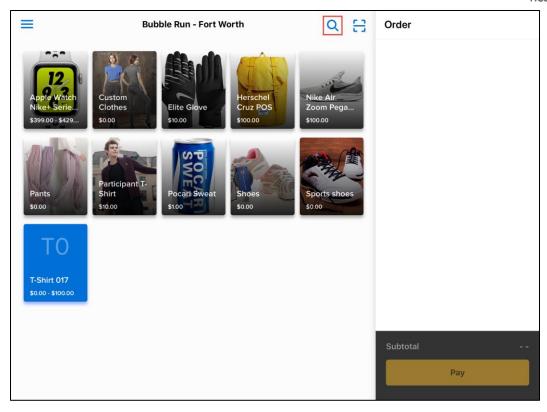
- On the left: a search box and available items.
- On the right: the current order.

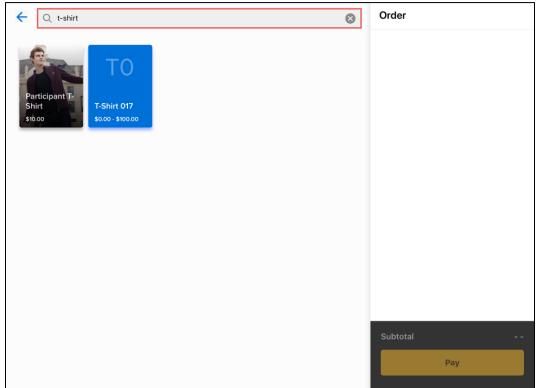


Searching for an item

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.







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

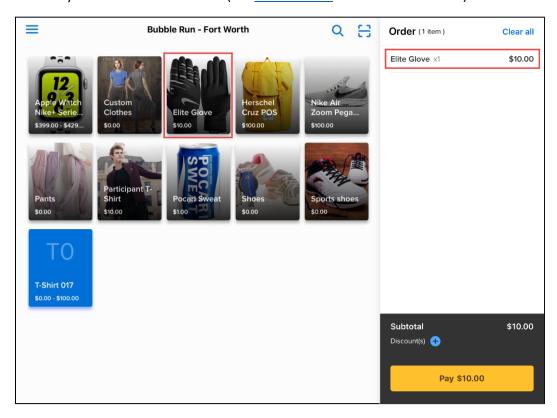


Adding items from the sales screen

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.

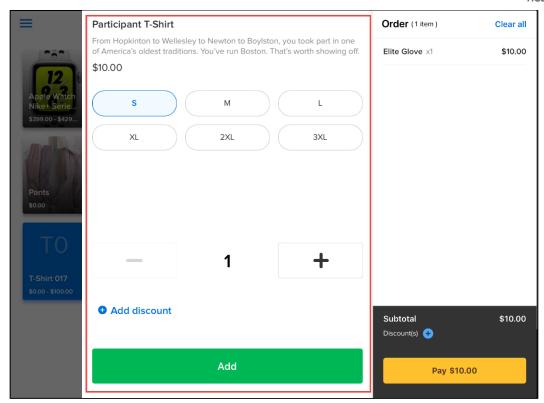
To add more of the same item, tap the item again.

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

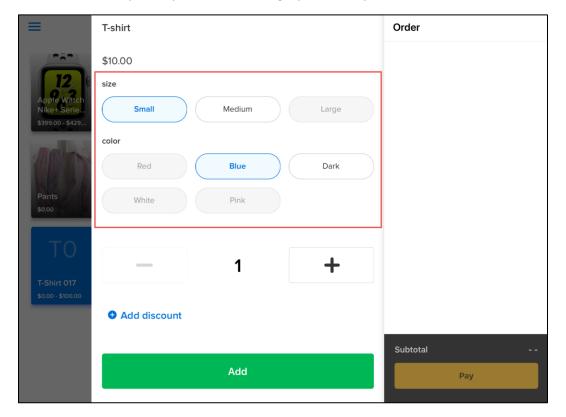


If an item has variations (for example, clothing sizes or colors), then tapping the item opens the item variation screen.



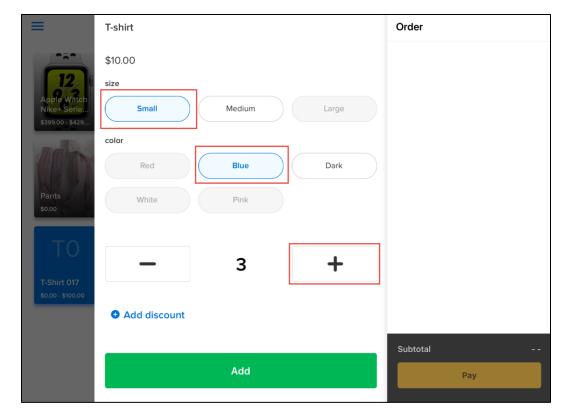


If there are variations of an item in different categories or tiers (e.g. size AND color), then the variations are listed separately under each category, for example:





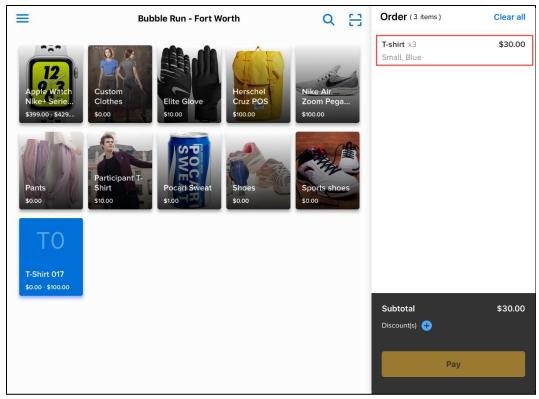
Tap the required variation and tap + or – to change the item quantity.



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.

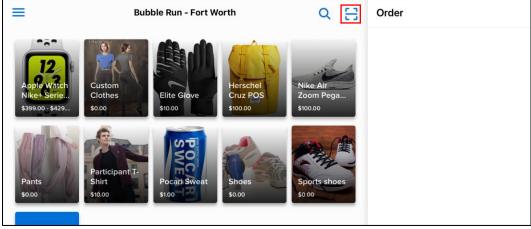




Adding items by scanning item barcodes

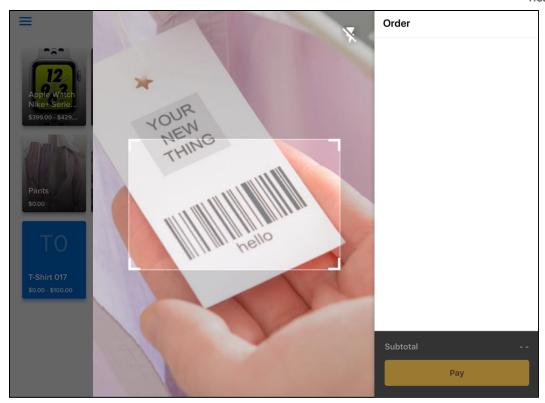
Items displayed on the sales screen can also be added to the order by scanning the barcode on the item (provided the item has been configured with a barcode):

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

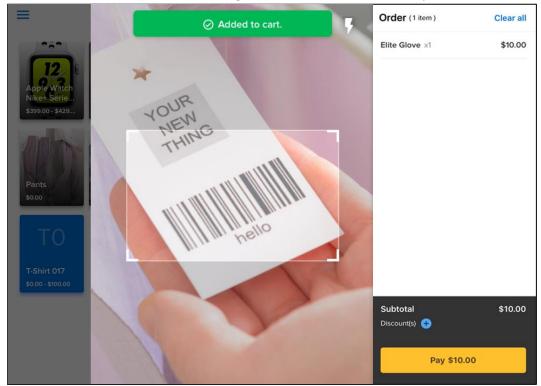


2. Point the mobile device's camera at the item's barcode until it is in focus in the viewfinder (**Note**: the POS app will ask for permission to access the camera if this permission has not been granted).



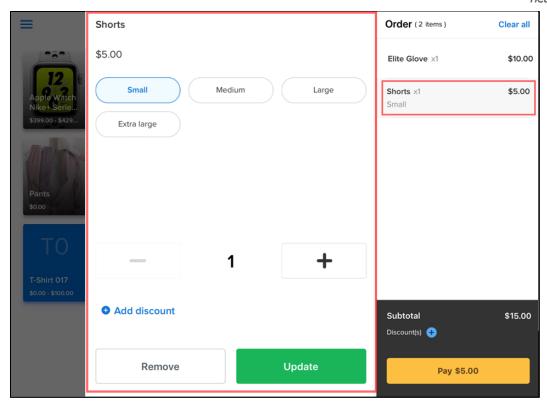


3. Once the barcode is scanned and recognized, the item is automatically added to the order.



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.





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:

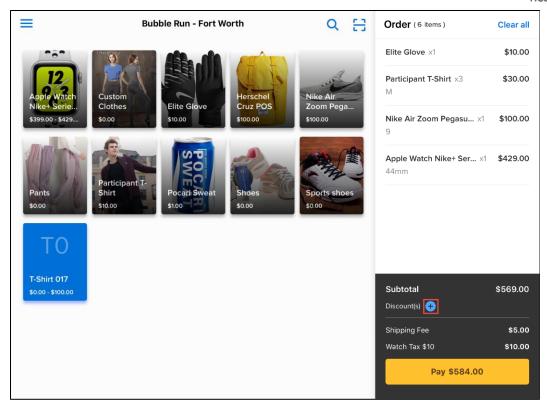
- A coupon code can be valid for one or more items in an order, depending on the organization's configuration.
- An item can be applied with only one of multiple coupon codes (if multiple codes work with an item, then only one of those codes can be applied in an order).
- Applying a coupon code will 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 <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 🛨.

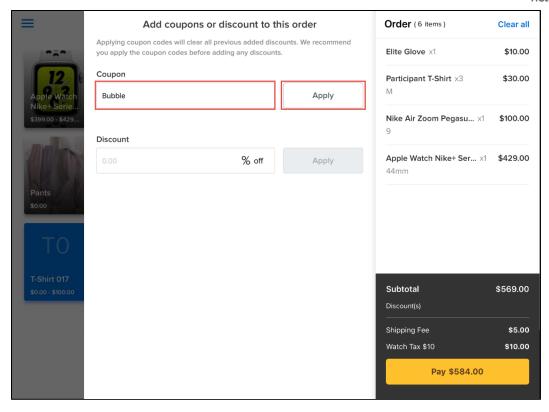


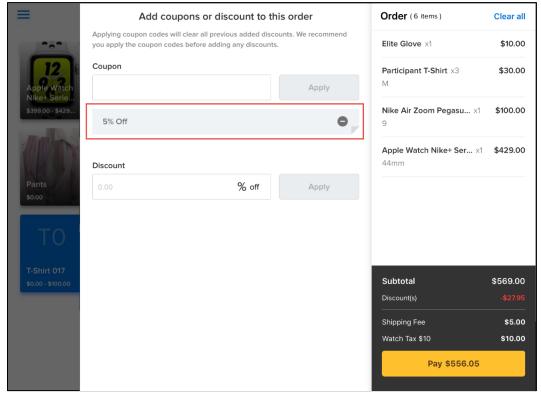


2. If the customer presents a coupon code, then under **Coupon**, enter the coupon code and then tap **Apply**.

Note: In offline mode (see 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.

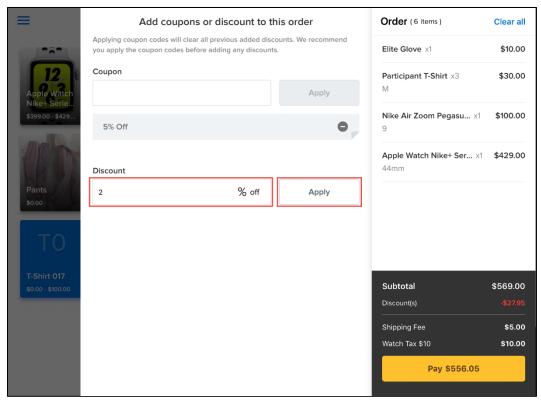






- 3. If the customer has more coupon codes, then enter the next coupon code and tap Apply.
- 4. To apply a percentage discount to the entire order, under **Discount**, enter the required percentage and then tap **Apply**.

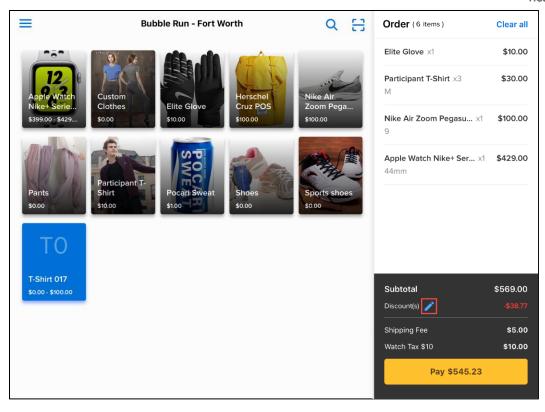


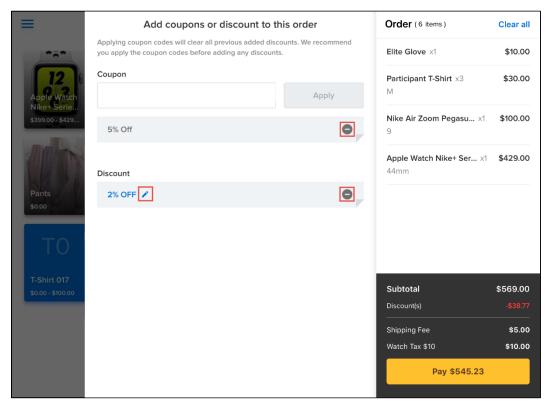


- 5. Tap anywhere on the screen to close the order-level coupons and discount screen.
- 6. To edit or remove the applied coupons or discount, next to **Discount(s)**, tap , then:
 - Tap

 to edit the order-level discount.
 - Tap to remove the order-level coupon or discount.





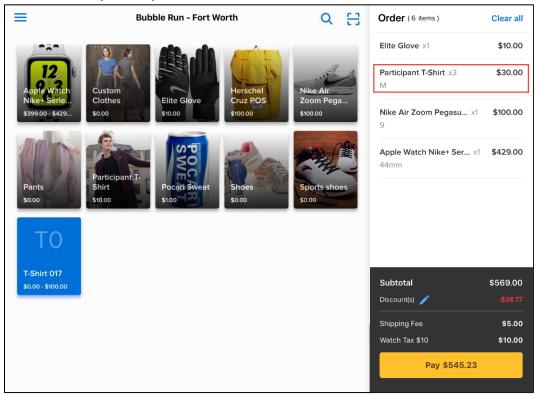


Applying an item-level discount

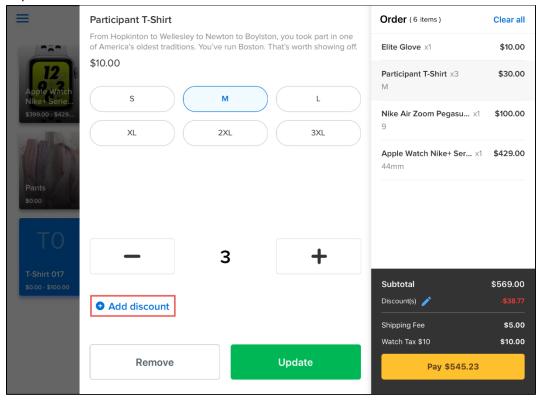
To apply an ad-hoc discount to an individual item:



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

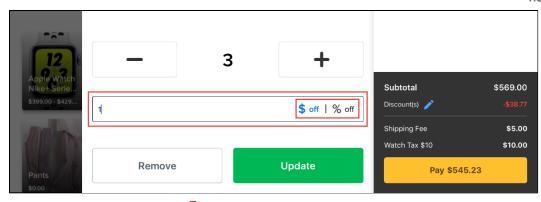


2. Tap + Add discount.

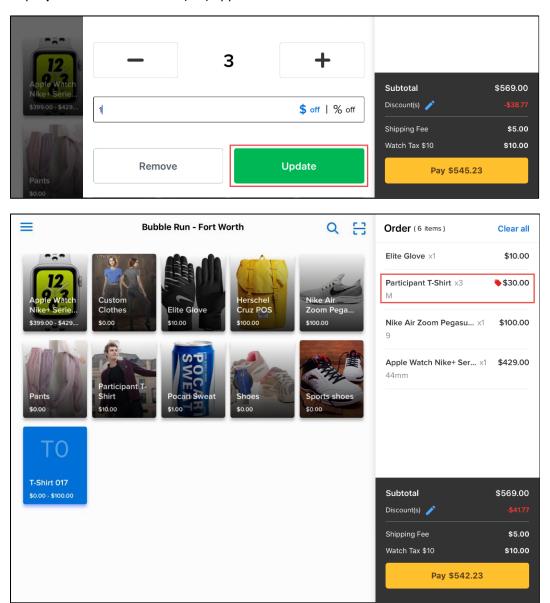


3. Enter the ad-hoc discount amount and then tap \$ off (for a fixed-amount discount) or % off (for a percentage discount) on the item, for example: \$1 off the item.





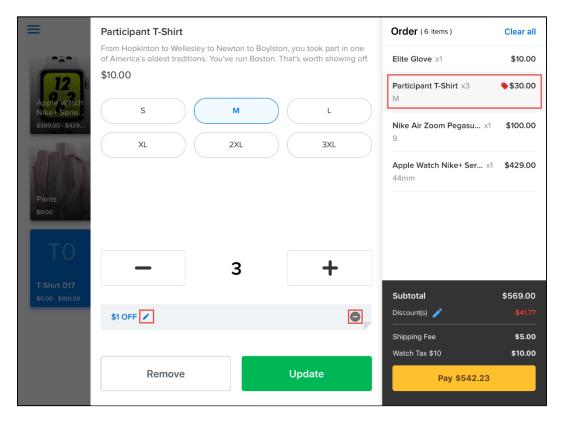
4. Tap **Update**. A discount icon () appears next to the item in the **Order**.



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: $3 \times 1 = 3$.
- 5. To edit or remove an item-level ad-hoc discount, under **Order**, tap the item, then tap or edit or remove the discount.

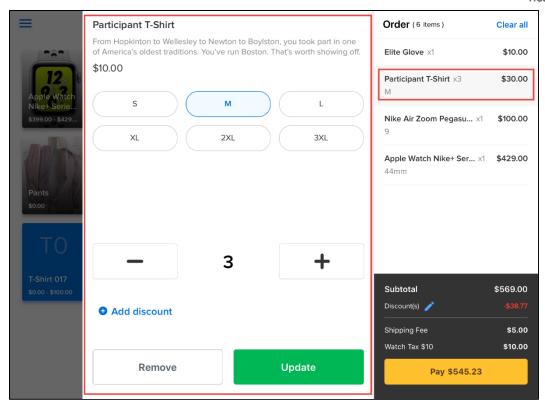


Editing an item in the current order

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.





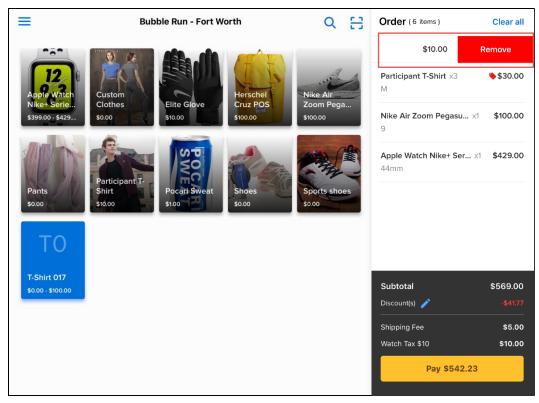
- 2. To change item quantity, tap + or –, or tap the number to manually enter the required quantity. For an item with no variations, tapping the item on the sales screen also increases the quantity by one per tap.
- 3. To change the item variation (if applicable), tap the required variation.
- 4. Tap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

Removing items from the current order

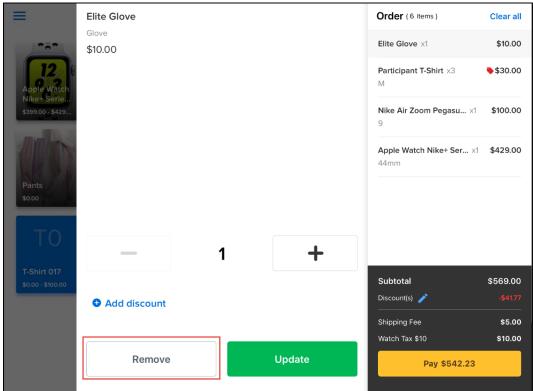
You can remove an item from the current order by one of the following:

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



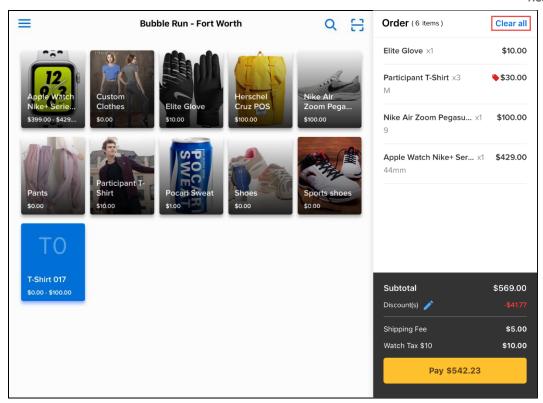


• Under Order, tap the required item to open the item detail screen and then tap Remove.



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

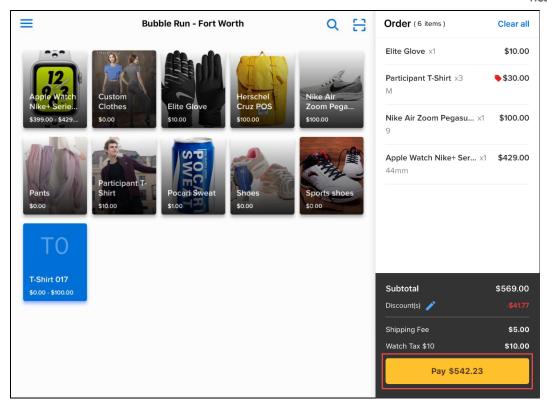


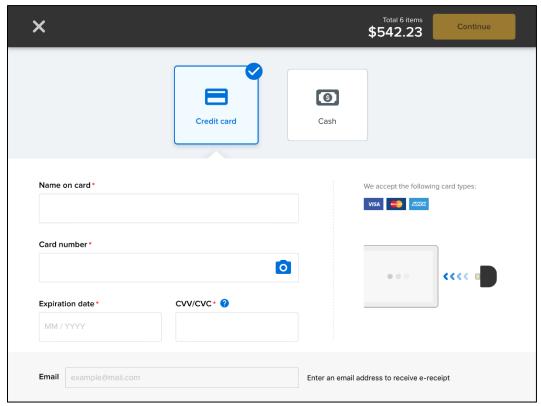


Checking out

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





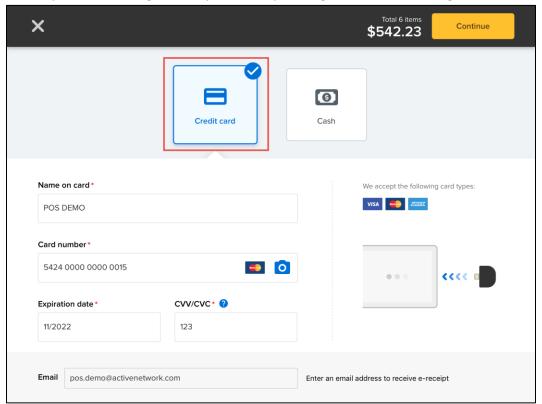


Paying with credit cards (online)

To process credit card payments when the network is connected:

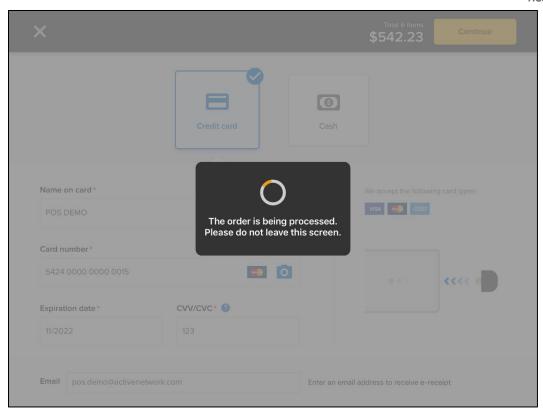


- 1. Tap Credit card (selected by default) and provide the card information by one of the following:
 - Manually enter the card information.
 - Tap o to scan the card number and expiration date, and then enter the cardholder's name and CVV/CVC number.
 - Swipe the card (magnetic-stripe card only) through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

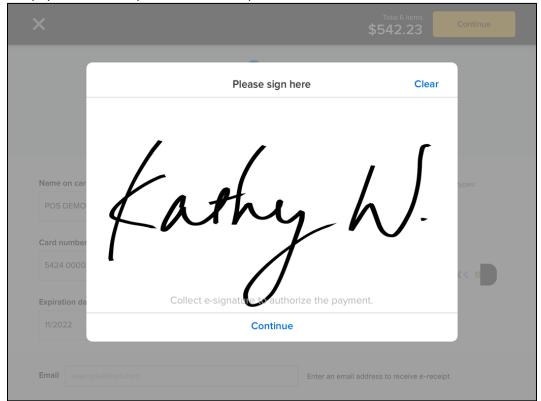


- 2. To email a copy of the receipt to the customer, enter their **Email** address.
- 3. Tap Continue.

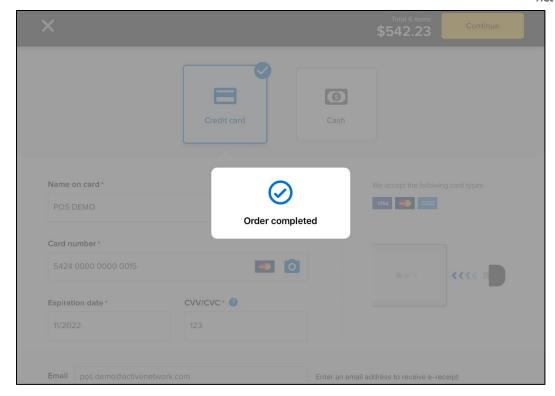




4. On the **Please sign here** popup, request the customer to sign his or her signature to authorize the payment. Then tap **Continue** to complete the order.

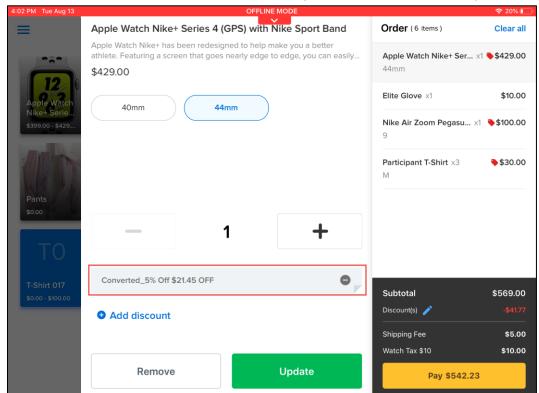






Paying with credit cards (offline)

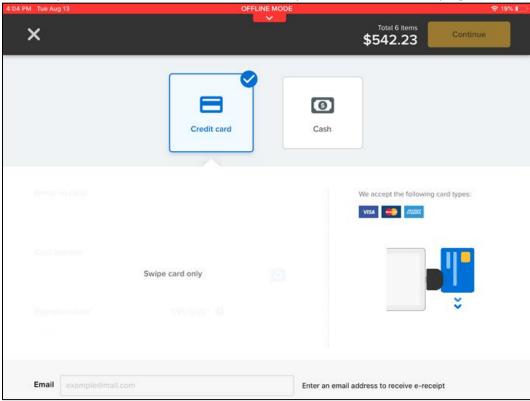
If the network is disconnected before checking out, then the discounts for any previously-applied coupons are converted to ad-hoc discounts and the coupons are removed. For example:





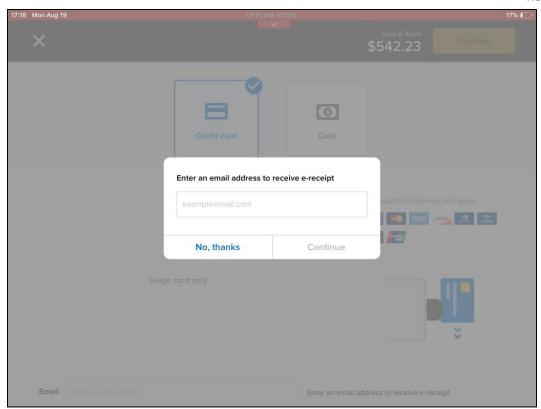
To process credit card payments while offline (only swiped card payments are accepted, see Offline mode for more information):

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

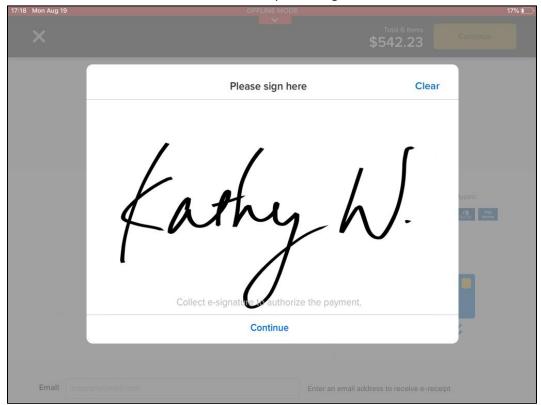


2. To email a copy of the receipt to the customer, enter their **Email** address in the popup and then tap **Continue**. Otherwise tap **No, thanks**.

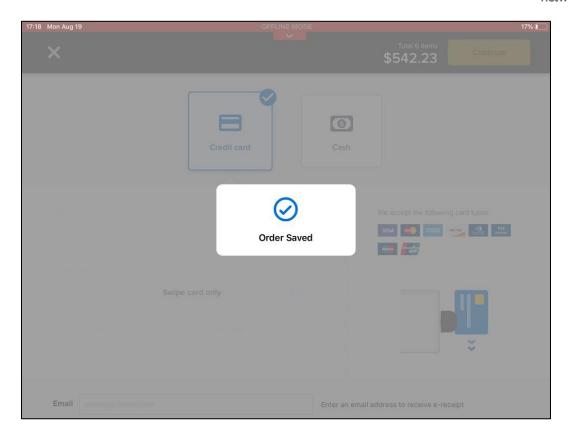




3. On the **Please sign here** popup, request the customer to sign his or her signature to authorize the payment. Then tap **Continue** to save the order. When the mobile POS device reconnects to the network, the order will be submitted for processing.





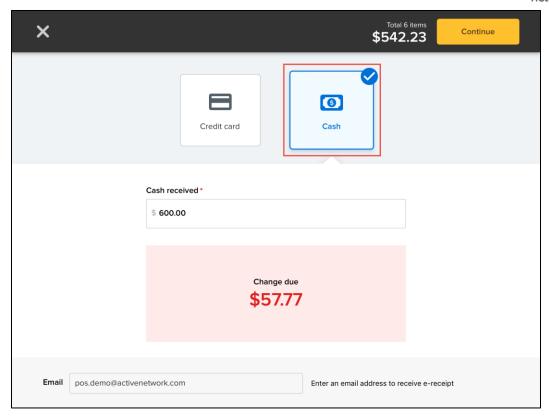


Paying with cash

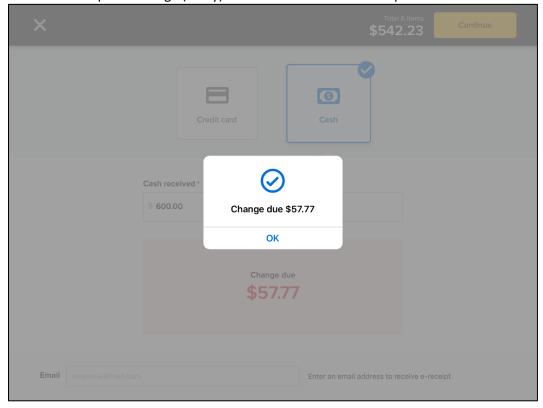
To process cash payments, on the payment screen:

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





- 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**.





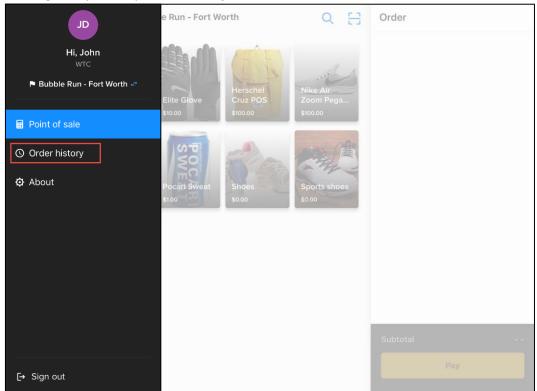
Viewing order history

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

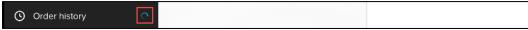
- Order history data for the current sign-in user is automatically synced when the device is connected to the internet.
- Successfully completed orders placed on this device are visible to all users in the same event only on this device
- Offline mode orders placed on this device that were submitted 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**.



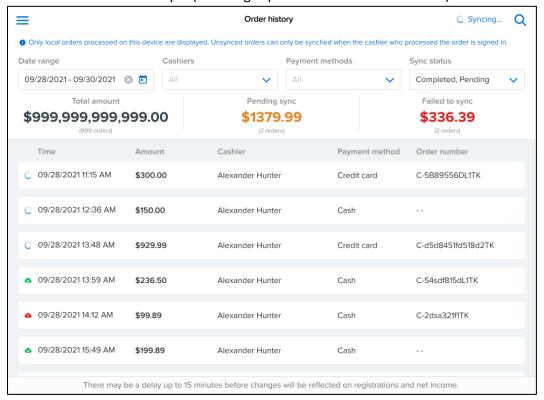
• If there are pending offline transactions being synced, then in the menu pane, a icon appears next to **Order history**.



- 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

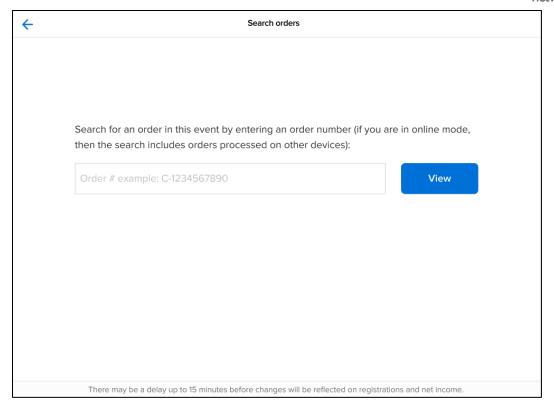


- O : Pending sync
- Failed to sync (including expired orders and failed orders)



- 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 Q icon and then enter the order number:

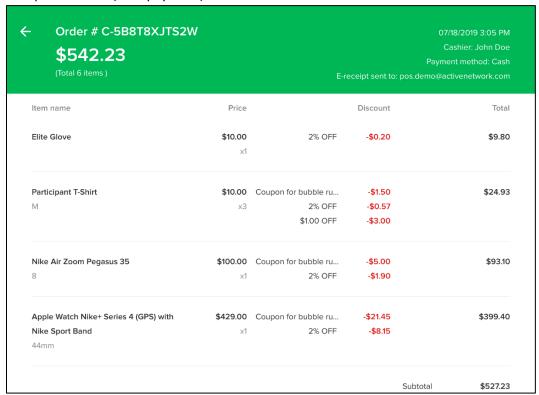




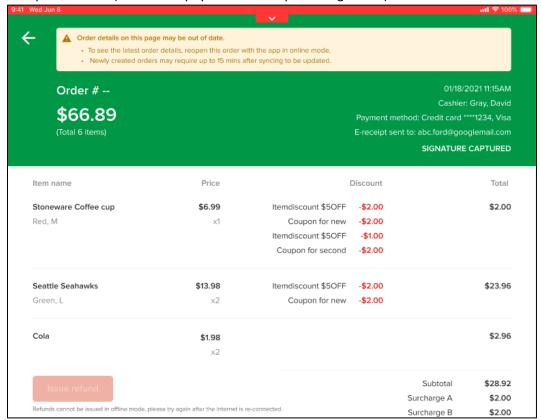
- 5. To view order details, tap the required order. Note that:
 - When in offline mode, displayed order details may be out of date. To view the latest order details, reopen the order with the app in online mode.
 - After newly created orders are synched, there may be up to a 15-minute delay before the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



• Completed order (cash payment):

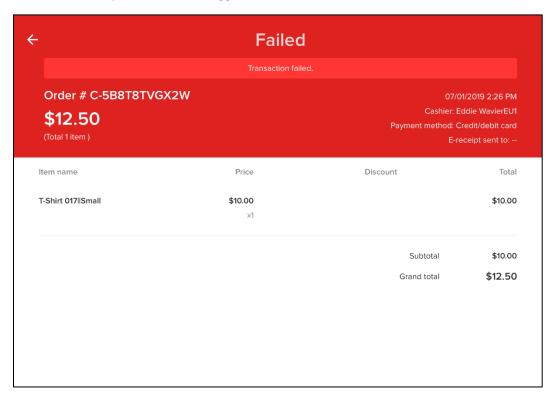


• Completed order (credit card payment with captured signature):



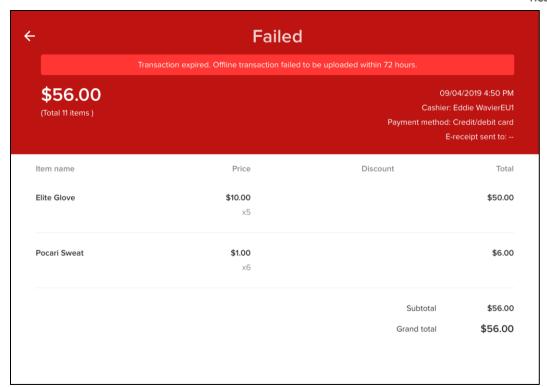


- Failed order:
 - Offline mode orders submitted within 72 hours and subsequently declined (for example, due to an expired card) are flagged as "Transaction failed".

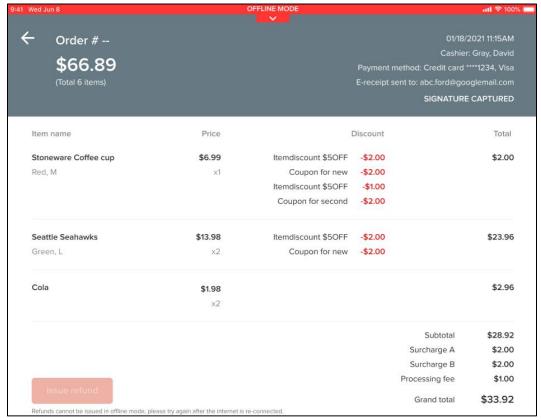


 Offline mode orders failed to be submitted within 72 hours are flagged as "Transaction expired".



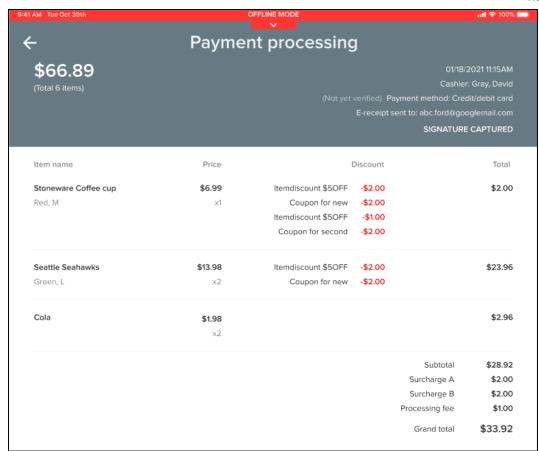


• Pending sync order:



Payment processing order:







Refunding an order

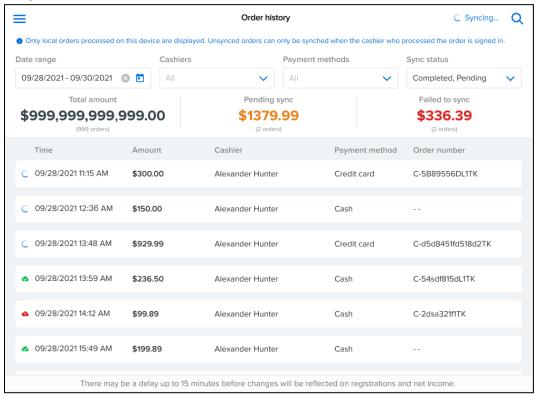
In ACTIVE POS, you can issue a refund for a completed order.

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.

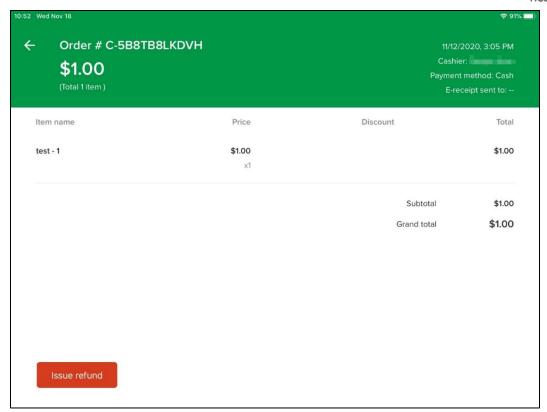
To issue a refund:

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

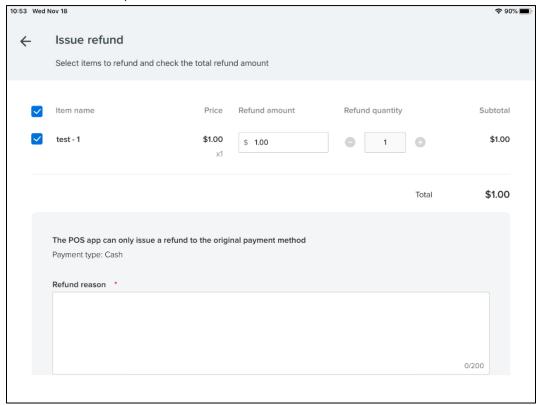


4. On the order detail page, click **Issue Refund**:





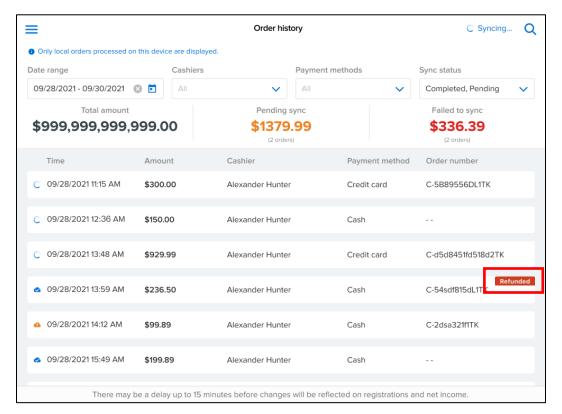
5. On the **Issue refund** page, for each item to refund, enter the refund amount and refund quantity. In the **Refund reason** field, enter the refund reason:





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.

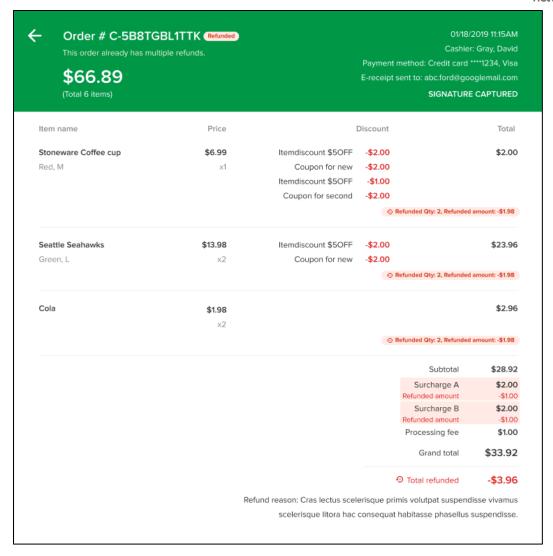


Note: After an order is refunded, the refund details may require up to 15 minutes to appear in the order details.

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.





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-on-iDynamo?searchIn=allTypes



Appendix II: Reconfiguring uDynamo Android card reader Key Set IDs

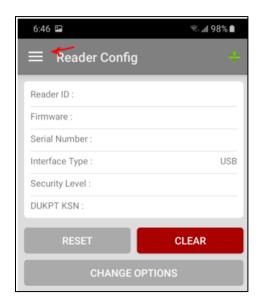
uDynamo Android card reader transactions may fail to be processed because the Key Set ID (KSID) is either unconfigured or incorrectly configured.

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:

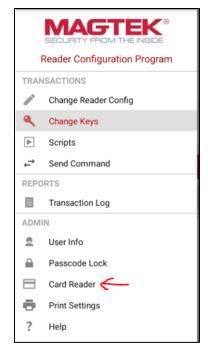


4. Tap the ≡ icon:

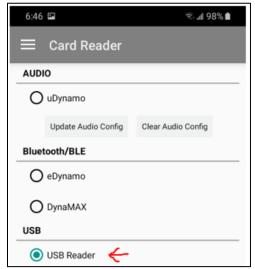


5. Tap Card Reader:



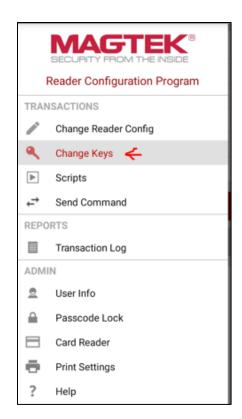


6. On the Card Reader page, select USB Reader:



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

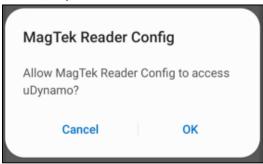




8. Tap the + icon:

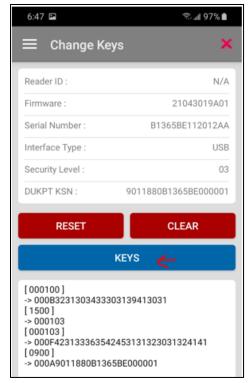


9. To connect to the card reader, tap **OK**:



10. Tap the **KEYS** button:

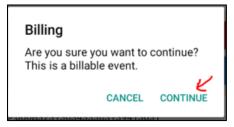




11. Tap the key to be loaded (**Default Magensa Key**):

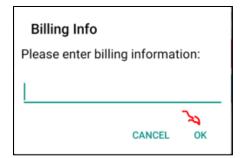


12. Tap **CONTINUE**:

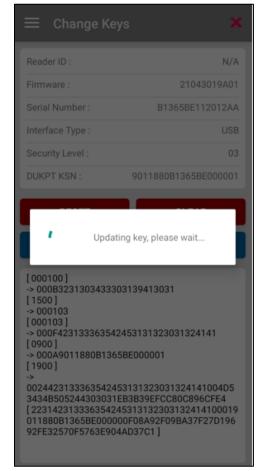


13. On the **Billing Info** popup, enter **ACTIVE** and then tap **OK**:

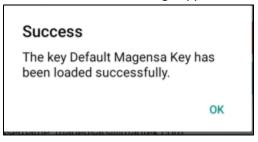




14. Wait for the key to update:



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.