SLIM CD, Inc.

SlimCD for iPhone

Powered by SLIM CD

By Frank Haggar
10/30/2011

SlimCD for iPhone

Contents

Overview 4

Hardware 4

Getting the Application 4

Transaction Flow Diagram 4

Logging In 5

Initial Login 5

Initial PIN setup 6

Clerk Login 9

Screen Layout 10

Screen Indicator 10

Screen Name 10

Navigation Buttons 10

Body Area 10

Status Bar 10

User Name Display 11

Configuration Wrench Display 11

Help Display 11

Tabs 11

Totals Tab 11

Sale Tab 11

History Tab 11

Using the Sale Tab 12

Selecting a Site 12

Performing a Swiped Transaction 13

SMS To: 16

EMAIL To: 17

CC: 17

Performing a Keyed Transaction 18

 © Copyright 2011 by SLIM CD, Inc. ALL RIGHTS RESERVED

Declined Transactions 21
Using the Totals Tab 22
Selecting a Date 23
Totals Summary 24
Daily Total Amount 24
Batch Amount 24
Daily Total Button 25
Batch Button 26
Using the History Tab 27
Transaction List 27
Receipt Button 29
New Transaction 29
VOID 30
CREDIT 30
FORCE 30
SALE 30
Configuration 33
User Configuration 33
CC Email Address 33
Select PIN 33
Administrator Configuration 34
Authentication Timeout 34
Erase all users 35
Help 36
Email Help 36
Call Us Help 37
Internet Help 37
Additional Resources 38

 © Copyright 2011 by SLIM CD, Inc. ALL RIGHTS RESERVED

SlimCD for iPhone

Overview

The SLIM CD mobile offering has been expanded to include a native application for the iPhone. This application can be downloaded directly from the App Store.

The SlimCD for iPhone application includes the following features:

1. Swiped* or keyed entry for credit cards. *Card reader purchased separately and produces encrypted card data.
2. Support for clerks or admins, where admin-mode produces daily summaries and batch totals
3. Transaction History that allows searching and listing of past transactions
4. Repeat-customer feature that allows an existing transaction to be used to create a new transaction
5. Address verification of zip code
6. CVV2 validation
7. Receipt delivery via email or SMS-Text messaging
8. Login by clientid or clerk name, with configurable login timeouts
9. Support for PIN or PASSWORD, making login fast and easy for mobile devices.

Hardware

The application supports the iPhone (3, 4, or 5), iPod Touch or iPad. The device must run iOS 4.2 or greater. An optional credit card reader is available from SLIM CD, Inc. by calling (877) 475-4623.

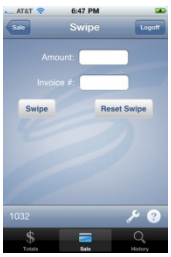
Getting the Application

Use your iPhone, iPod Touch or iPad to search the App Store. Search for "SlimCD" (without spaces). Once you have downloaded the app, you can begin using it with your SLIM CD ClientID and Password.

Transaction Flow Diagram

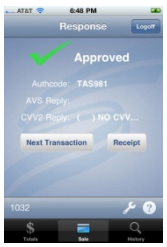
The following series of screens represent a simple swiped transaction.

Log in



Enter Amount

Swipe Card



Review Results

Send Receipt

We welcome you to download the application and get started today.

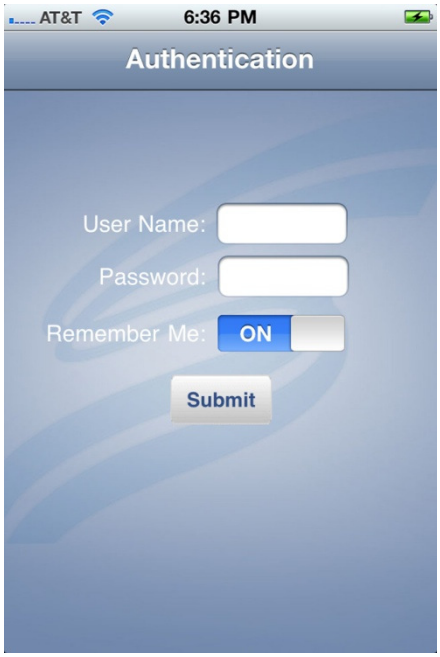
© Copyright 2011 by SLIM CD, Inc. ALL RIGHTS RESERVED

Logging In

Once the SlimCD for iPhone app is installed, you can click on the app to log in. The initial screen allows you to enter your login credentials. You can enter the same "client-level" credentials you use to log into slimcd.com, including either a ClientID/Password or a Clerk/Password.

Initial Login

The first time you log onto each device, you will be given the option to set up a shortcut PIN. This PIN allows the last user to log back in with a 4-digit PIN instead of reentering their full username/password. Here are the events for logging in, beginning with the ClientID/Password.



Initial Screen

Launching the application shows the login screens. You can enter your ClientID or your Clerk Name as the User Name.

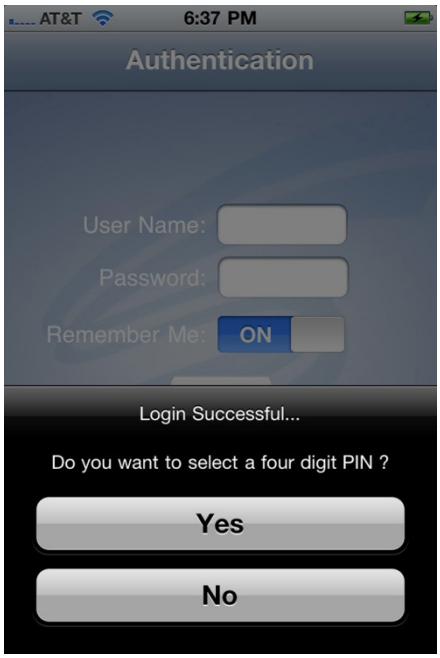
© Copyright 2011 by SLIM CD, Inc. ALL RIGHTS RESERVED

Enter the Password

Enter the associated password. Select the "Remember Me" option if you wish to have the application pre-fill your User Name when you return to the application. (Note: Password will not be remembered.)

Initial PIN setup

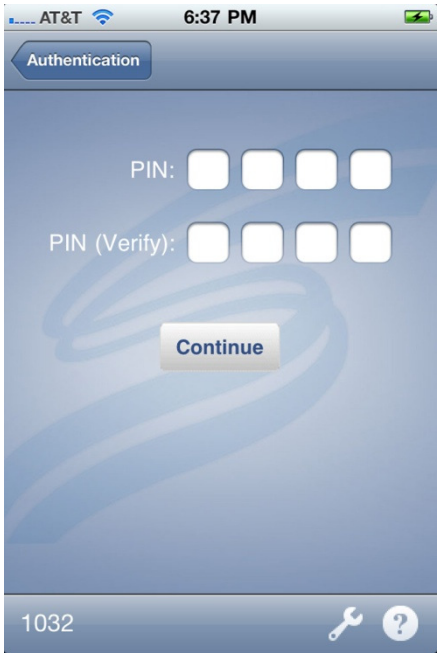
Upon successful login, you will be presented with the option to set up a 4-digit PIN code. This PIN allows the last user to log in again without having to type in the password.



Select "Yes" to set up a PIN

© Copyright 2011 by SLIM CD, Inc. ALL RIGHTS RESERVED

Setting up a PIN allows you to log back in quickly with 4 easy digits instead of your normal SLIM CD website password.



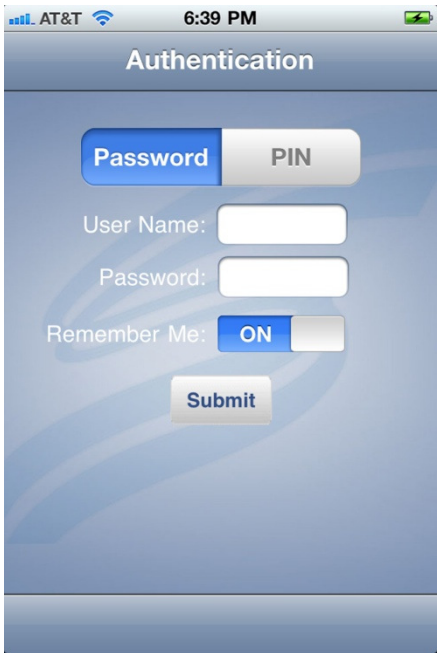
Enter 4 numeric digits

If the PIN and the verification both match, the PIN will be created. You can change your PIN later, in the configuration screens.

Successful PIN creation

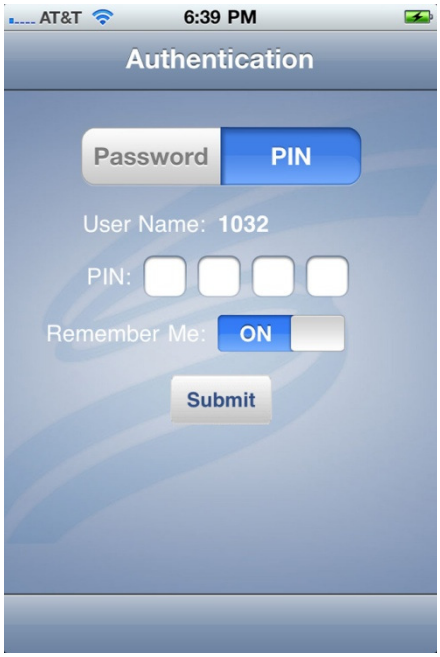
Once you have established a PIN, your future login screens will present the option of logging in with a Password or a PIN.

© Copyright 2011 by SLIM CD, Inc. ALL RIGHTS RESERVED



Login with Password or PIN

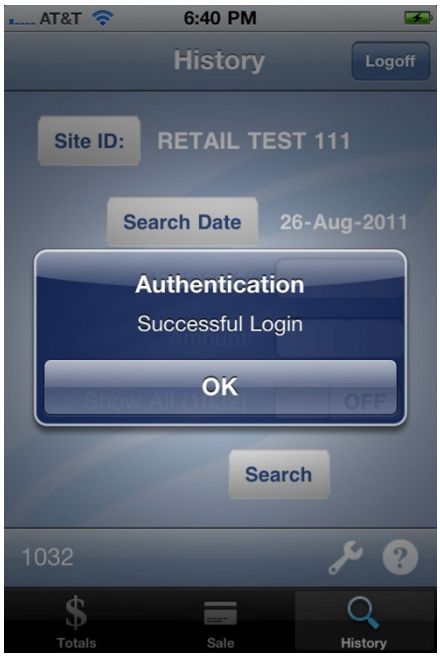
You can enter your password and log in, or you can click on PIN to change the screen so that PIN entry logs you in.



PIN entry for the most recent user

The PIN screen displays the most recent user's name, and allows entry of a 4-digit PIN login. Entering these 4 digits logs the last user back into the app safely and easily.

© Copyright 2011 by SLIM CD, Inc. ALL RIGHTS RESERVED



PIN login successful

Clerk Login

Clerks from slimcd.com can log in with their clerk name and password. You can create additional clerks by logging into slimcd.com with administrative access for your account. Below is an example of a clerk login.

Clerk Login

© Copyright 2011 by SLIM CD, Inc. ALL RIGHTS RESERVED

Screen Layout

Once you have logged into the Slim CD for iPhone application, you will be presented with the main screen layout.

Screen Indicator

The Screen Indicator provides text that identifies the screen you are currently viewing and provides any navigation buttons.

Screen Name

This is centered on the Screen Indicator and identifies the current Tab (or command) running in the Body Area.

Navigation Buttons

Various navigation buttons may appear on the left or right of the screen. Navigation buttons that appear on the left of the Screen Indicator typically move back to previous screens. Buttons that appear on the right of the Screen Indicator often execute functions to move to additional screens or to log out of the application.

Body Area

The body area is the main portion of the display. All data entry and other functions are controlled from within the body area.

Status Bar

The status bar is displayed across the bottom of the Body Area. It contains additional buttons across the Status Bar.

© Copyright 2011 by SLIM CD, Inc. ALL RIGHTS RESERVED

User Name Display

The User Name will be displayed on the left end of the status bar. Tapping on the User Name displays the User Configuration screen.

Configuration Wrench Display

The Configuration Wrench Display is placed in the right hand portion of the Status Bar. Tapping on the Configuration Wrench symbol allows you to access the Administrator configuration screen.

Help Display

The Question-mark is displayed at the far right edge of the Status Bar. The Help System provides instant access to SLIM CD's phone number, support email address, and website.

Tabs

Tabs across the bottom allow you to perform the main functions of "Totals", "Sale", and "History".

Totals Tab

The Totals Tab changes the screen to show you a daily transaction summary and batch totals. You must be logged on with a Web Admin user type (instead of Web Clerk) to use this feature. Clerk users will not see this tab.

Sale Tab

The Sale Tab allows you to process keyed or swiped transactions. Different sub-screens will appear for swiped and keyed transactions. The sub-screens are designed to meet the needs of keyed or swiped transaction processing.

History Tab

The History Tab allows you search and list past transactions. From here, you can review activity, send duplicate receipts, and create new transactions based on previous data (including Sale, Force, Void, and Credit transactions).

© Copyright 2011 by SLIM CD, Inc. ALL RIGHTS RESERVED

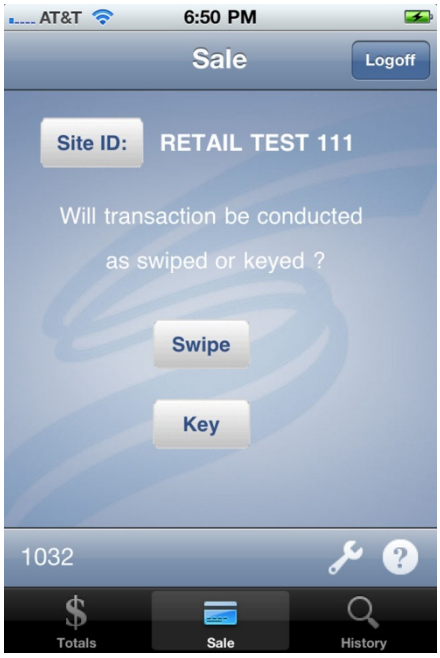
Using the Sale Tab

To accept payment for goods or services, use the Sale Tab. Most Transactions are performed using the Sale tab, either directly by tapping on Sale in the Tab Bar, or by using buttons from other screens.

Transactions performed from the Sale Tab can be swiped or keyed. After tapping on the Sale Tab, the user can identify if they wish to swipe or key the transaction. In addition, the user can switch sites if there is more than one site configured for that user.

Selecting a Site

Most clients only utilize a single site on the SLIM CD system. However, some clients have more than one site. Transactions must be associated with a site, and the Sale Tab's initial screen gives the user a chance to select the site.



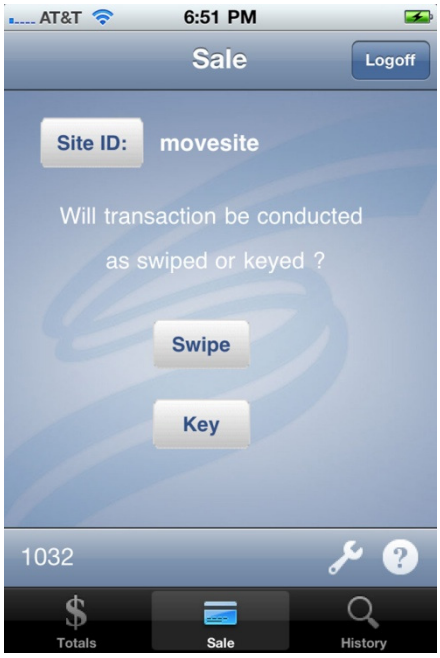
Site Selection with the Site ID button

Tapping on the Site ID button will display the standard Selection Wheel, containing all of the sites available to that user.

© Copyright 2011 by SLIM CD, Inc. ALL RIGHTS RESERVED

Site Selection Wheel

Scroll the wheel until the desired site name is highlighted and tap on the Continue button. This will change the site for which transactions are performed.

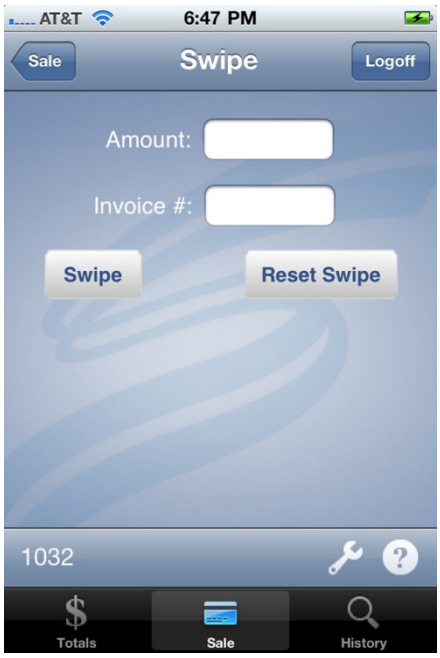


Sale Tab with a different Site selected

Performing a Swiped Transaction

Credit card transactions can be keyed or swiped. Press the appropriate Swipe or Key button at the prompt.

© Copyright 2011 by SLIM CD, Inc. ALL RIGHTS RESERVED

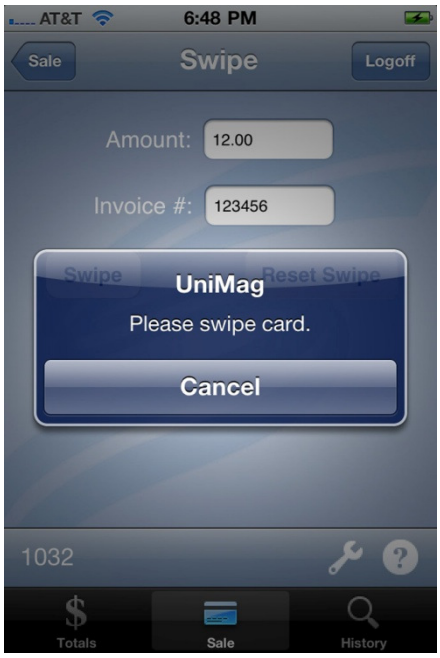


Amount Entry Screen for Swipe

The Swipe Screen allows you to enter the amount of the transaction and an optional Invoice #. The Invoice # can be any value you wish to use to identify a transaction. After entering this information, tap on the Swipe button. When pressing the Swipe button, the app will attempt to power up the card reader. Be sure to have the card reader plugged into the earphone jack and the volume at maximum. Note: If you are experiencing difficulties or need to reset the device, use the Reset Swipe button.

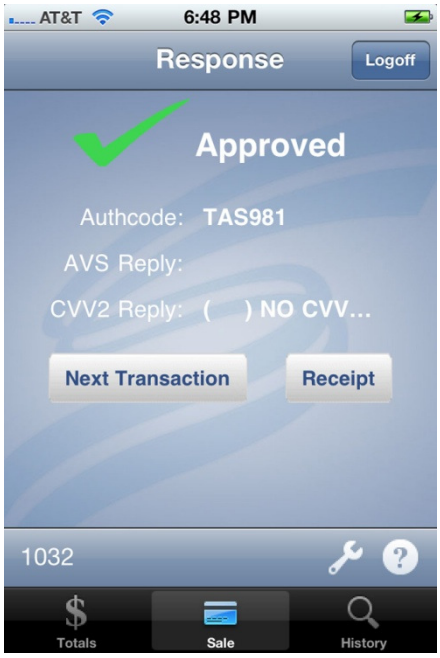
Swipe Button – Powering Up

© Copyright 2011 by SLIM CD, Inc. ALL RIGHTS RESERVED



Swipe Ready Indicator

Once the device is ready, GENTLY swipe the card. These devices require a gentle touch. They are not made for high speed swiping and work best with a steady, smooth motion.



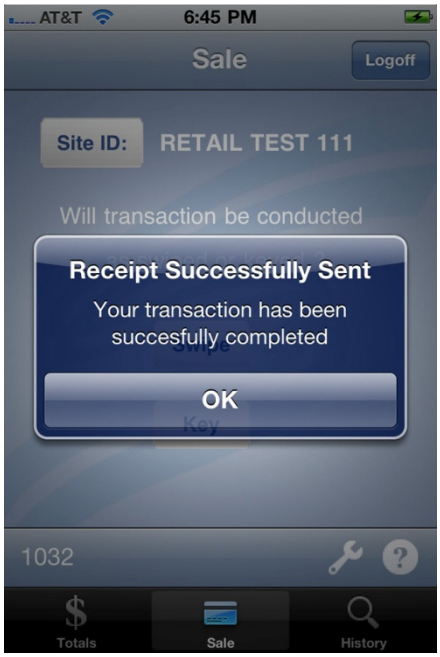
Approved Screen

The app will show the response as either Approved or Declined. For an Approval, you will be able to tap on the New Transaction button to perform the next transaction or the Receipt button to send receipts via email or SMS-Text message.

 © Copyright 2011 by SLIM CD, Inc. ALL RIGHTS RESERVED

Receipt Options

When tapping on the Receipt button, a screen appears which allows you to send a receipt to the customer or to yourself. Sending a receipt causes a notice to appear.

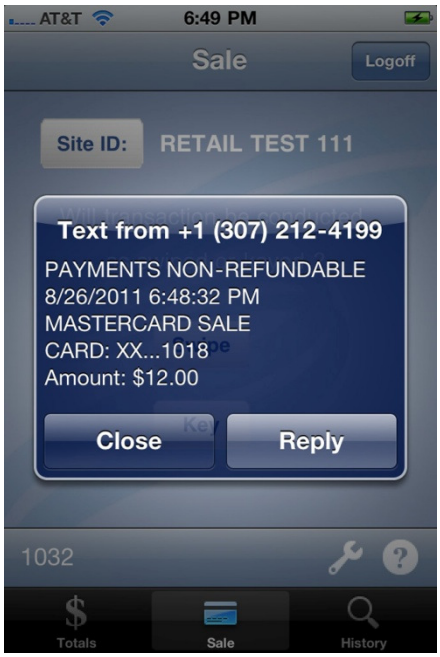


Receipt Sent Notification

SMS To:

You can optionally enter a mobile phone number for which a receipt is to be sent via SMS-TEXT messaging. Below is an example of an SMS-Text receipt.

© Copyright 2011 by SLIM CD, Inc. ALL RIGHTS RESERVED



SMS Text Receipt

EMAIL To:

You can optionally enter an email address for your customer so they can receive a receipt via email.

CC:

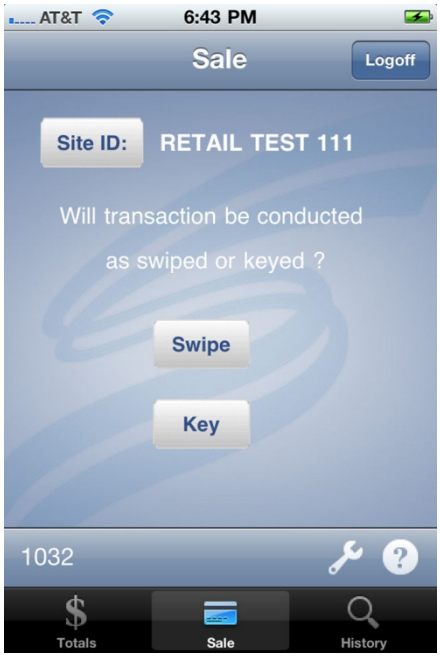
You can have the system automatically send email receipts back to your office for your own records by filling in the CC email field and by selecting the indicator that identifies you want an email receipt. (Note that many of today's new HP printers can automatically print anything sent to a specialized "@hpemail.com" email address and this is a great way to get receipt printing at the office while you conduct transactions in the field.

Note: Receipts can be re-sent at any time from History Tab.

© Copyright 2011 by SLIM CD, Inc. ALL RIGHTS RESERVED

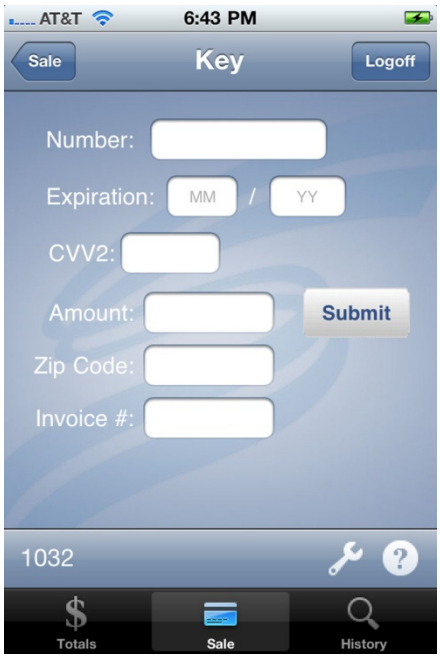
Performing a Keyed Transaction

If you tap on the Key button of the Sale Tab's screen, you can manually key in the purchaser's card number and other data to complete the sale.



Sale Tab – Swipe or Key Selection

Tapping on Key will bring up the Key Screen.



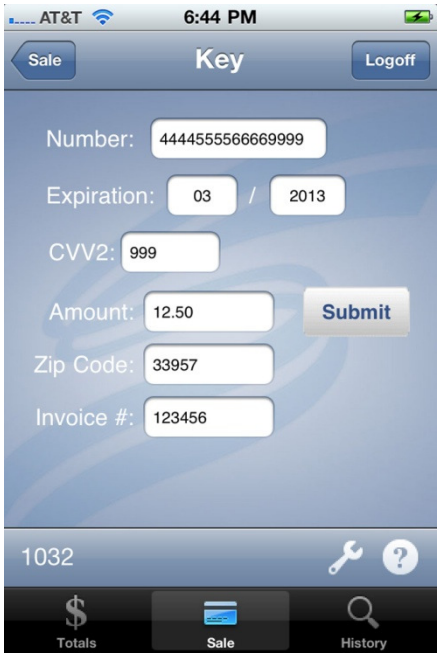
Screen for Key Entered Transactions

© Copyright 2011 by SLIM CD, Inc. ALL RIGHTS RESERVED

Tap on the Number prompt to enter the card number using a numeric keypad. Tap on either of the expiration fields to use the standard MM/YY selection wheel. Note that a single wheel can be used to select both the expiration month and date.

Expiration Date Entry of Month & Year

After selecting both the Month and Year, tap on the "Done" button. Complete the remaining information, such as the Amount, CVV2, Zip Code, and Invoice #.



Keyed Entry fields

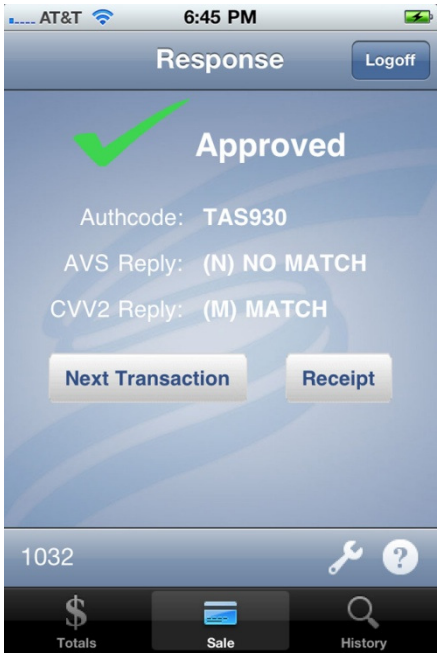
© Copyright 2011 by SLIM CD, Inc. ALL RIGHTS RESERVED

CVV2 is the last 3 digits on the back signature area for Visa, MasterCard and Discover cards. It is the 4 digits printed on the front of an American Express. This value may be optional or required, depending on the settings of the Slim CD Gateway.

Zip Code is the zip code for consumer's billing address (where the consumer receives their credit card bill). It may be optional or required, based on settings of the Slim CD Gateway.

Invoice # is always optional, but recommended. This data contains information that helps the user identify the transaction, such as a customer number, order number, or other merchant notation for this transaction.

Tap on the Submit button to send the transaction for processing. A status screen will appear to provide information on the approval or decline of the transaction.



Keyed Response

For keyed responses, the AVS Reply indicates the status of the Zip information (various letters indicate different types of Match or No Match, such as 5-digt zip match, 9-digit zip match, or No Match). The CVV2 Reply indicates the status for the CVV2 information entered (Match or No Match). ***Please note that if you entered a CVV2 and the transaction is returned with a No Match value, you are strongly encouraged to VOID the transaction and retry with the proper CVV2 information.***

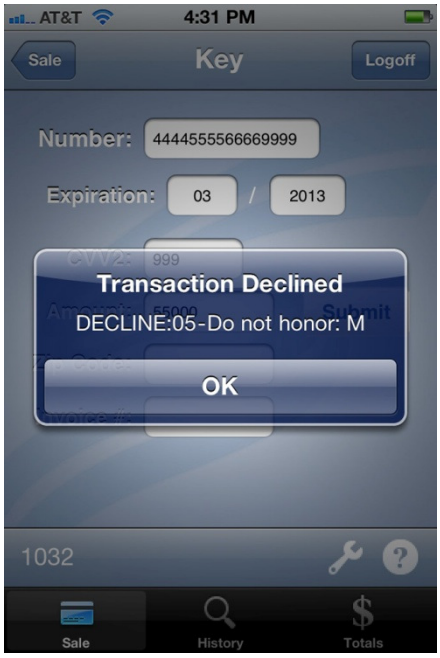
The Next Transaction button returns to you the starting Sale Tab screen. The Receipt button produces a receipt for transmission by email or SMS-Text. See above on Swiped Transactions for the details.

Note: Keyed transactions can be identified on receipts by an asterisk (*) following the last 4 digits of the card number.

 © Copyright 2011 by SLIM CD, Inc. ALL RIGHTS RESERVED

Declined Transactions

When a transaction is declined, a popup window will provide the reason for the decline. In some cases (such as invalid CVV2) you can correct and retry the transaction.

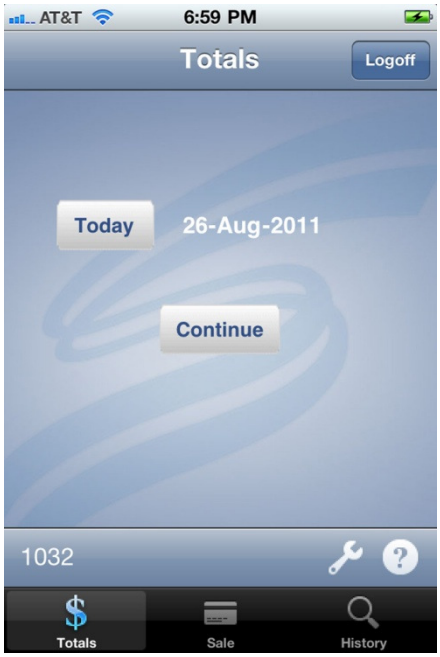


Decline Transaction

© Copyright 2011 by SLIM CD, Inc. ALL RIGHTS RESERVED

Using the Totals Tab

The Totals Tab allows business owners to quickly review their processing totals. There are two types of totals: Daily Summary and Batch Totals. The Daily Summary shows the total transactions for the selected date. The Batch Totals sums all batches and shows the totals for the selected date. The first screen is the date selection screen.



Totals Date Selection Screen

The current date will be shown by default. Tap on the Today button to select a different date, or tap on Continue to get the totals for today.

© Copyright 2011 by SLIM CD, Inc. ALL RIGHTS RESERVED

Selecting a Date

If you tap on the Today button, the standard Date selection wheel will be displayed.

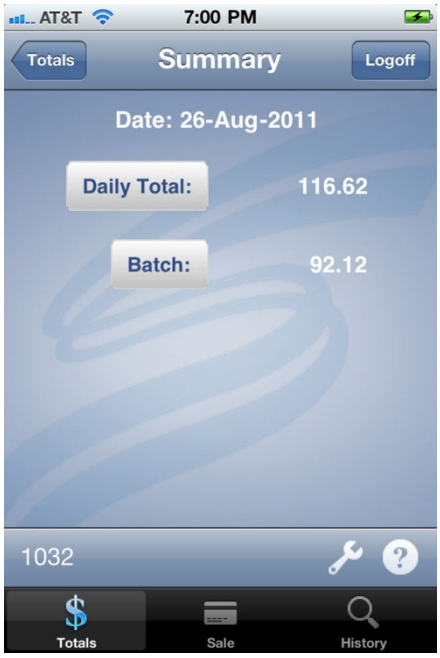
Date Selection

The dates selected will be passed to the SLIM CD Gateway, which uses Eastern Standard Time (EST). Transactions run in a different time zone will be stored as Eastern Standard Time by the SLIM CD Gateway.

© Copyright 2011 by SLIM CD, Inc. ALL RIGHTS RESERVED

Totals Summary

When the Continue button is tapped, the totals for that date's transactions are presented. There are two sets of summaries: Daily Totals and Batch Totals.



Totals Summary

Tapping on either the Daily Totals or the Batch button will produce screens with additional details. Below are descriptions of the amounts shown on the Totals Summary.

Daily Total Amount

The Daily Summary shows the NET of all approved transactions run on the specified date, based on the SLIM CD Gateway's transaction counts (i.e. "the Rawlogs" in slimcd.com). This includes all Sale transactions, minus all Credit transactions.

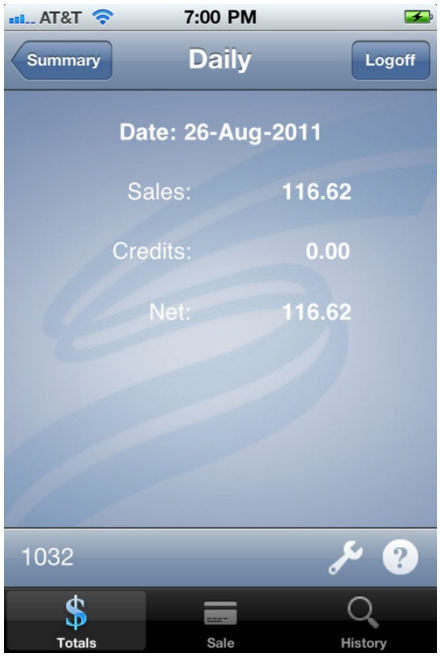
Batch Amount

The Batch shows the NET of all batches closed on the specified date. Note that if batches are closed at 11PM, this amount may be $0.00 until the batch is closed. Also note that batches that close at midnight will represent transactions processed from the previous day. In this case, yesterday's Daily Total may match today's Batch amount.

© Copyright 2011 by SLIM CD, Inc. ALL RIGHTS RESERVED

Daily Total Button

Tapping on the Daily Total button of the Totals Tab's Summary screen will present a detailed report for that day's totals.



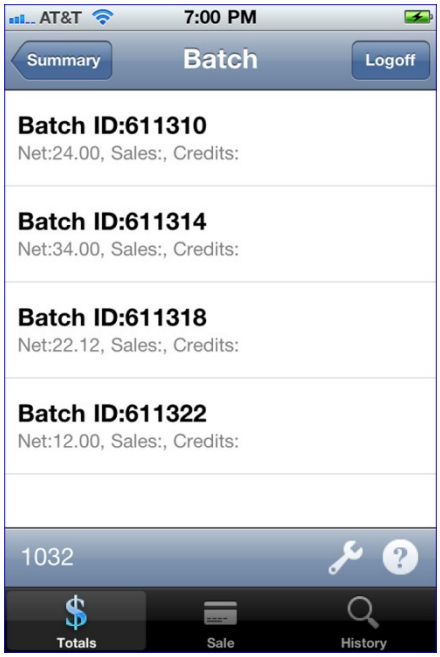
Daily Totals Breakdown

This screen shows the Sales, Credits and Net transactions that make up the Daily Totals amount. Tap on the Summary to move backwards and select a different date.

© Copyright 2011 by SLIM CD, Inc. ALL RIGHTS RESERVED

Batch Button

Tapping on the Batch button of the Totals Tab's Summary screen will present a list of all batches that were summed to make the batch totals. Note that most merchants close a single batch, so there may be only one item in the list.



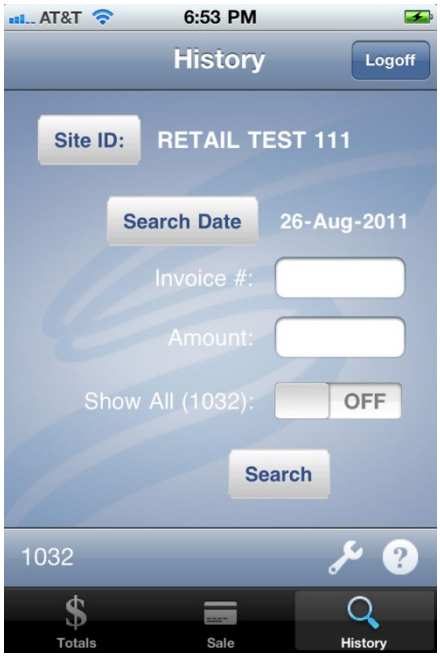
Batch Screen

The contents for the Batch reports are processor-dependent. Different processor implementations make different information available. This screen will attempt to show the Net Deposit as well as Sales and Credits that determine that Net amount, however not all data may be available for each processor.

© Copyright 2011 by SLIM CD, Inc. ALL RIGHTS RESERVED

Using the History Tab

The History Tab allows users to locate old transactions. Once located, an old transaction can be used to resend a receipt or generate a new transaction.



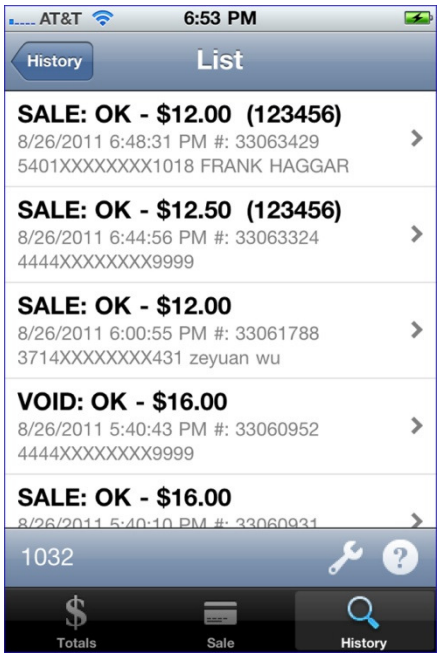
History Tab Screen

This screen allows you to change the Site ID and Search Date. You can also search for a specific Invoice # or an exact amount of a transaction. If you are logged in as an administrator, you can search for all transactions for the account, or just your own (ones performed by your login). If you are logged in as a web clerk user, this option will not be available and you can only search for your own transactions.

Transaction List

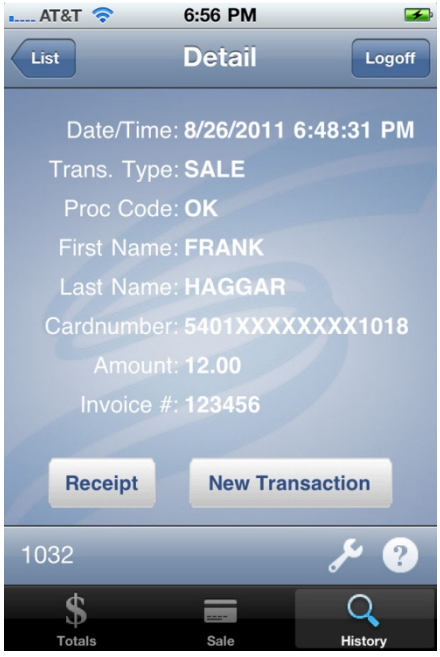
Tapping on the Search function will display the results of your search criteria.

© Copyright 2011 by SLIM CD, Inc. ALL RIGHTS RESERVED



Search Results

Individual transactions are displayed in a list that shows the transaction type, approval status and amount. Additional details include the date/time of the transaction, the SLIM CD Ticket # (a unique number for each transaction) and the card number. Tapping on an individual transaction brings up details for that transaction.



Transaction Detail

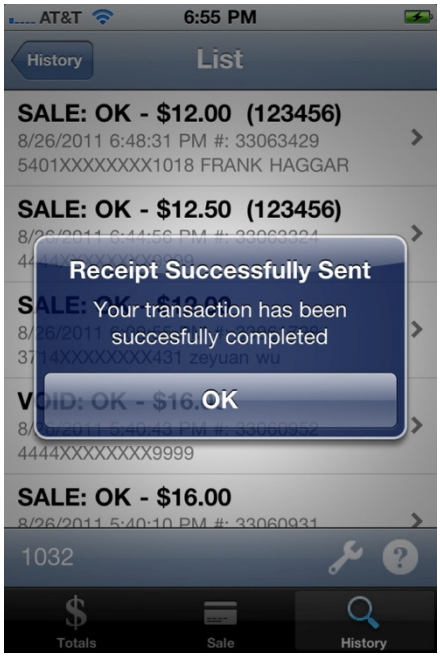
From this screen, you can send a duplicate receipt or create a new transaction. Tap on the appropriate button to perform the associated action.

© Copyright 2011 by SLIM CD, Inc. ALL RIGHTS RESERVED

Receipt Button

Tapping on the Receipt button allows you to resent the receipt.

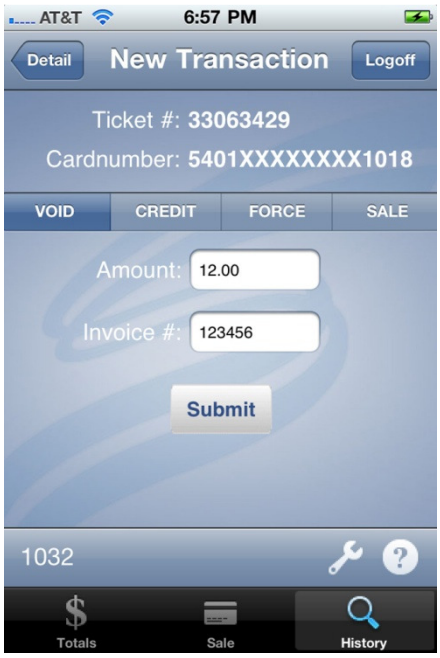
Enter Recipients



Receipt Sent

New Transaction

Tapping on the New Transaction button allows you to create a new transaction using the information from the original transaction. The New Transaction Screen will be presented.

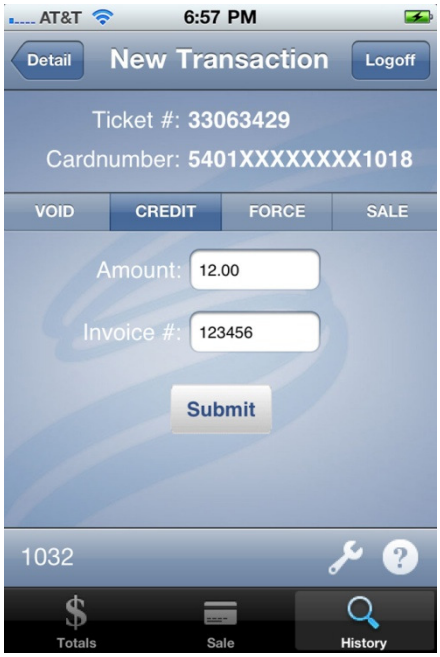


New Transaction

© Copyright 2011 by SLIM CD, Inc. ALL RIGHTS RESERVED

This screen displays the Ticket # of the original transaction and the card number associated with that transaction. From here, you can return to the Details Screen. Or, you can use the row of tabs to select a new transaction type to perform. The choices are VOID, CREDIT, FORCE, and SALE. To perform any of these types, select the appropriate choice and enter an amount. You can also enter an invoice # for your record-keeping purposes.

The below example indicates that a CREDIT transaction will be performed using the data on file.



Credit Transaction

VOID

A VOID transaction removes the original transaction so that it will not be charged to the customer's card. You can perform a VOID transaction if the original transaction was a SALE, AUTH, or FORCE. You can also perform a VOID on a CREDIT if the CREDIT was performed in error. Note that the original transaction must be in the currently open batch (a batch-close cannot have occurred). VOID transactions are most effective when performed on a transaction from the current day, as batches are typically closed nightly.

CREDIT

A CREDIT transaction returns money to the cardholder. To perform a CREDIT, select a SALE or FORCE.

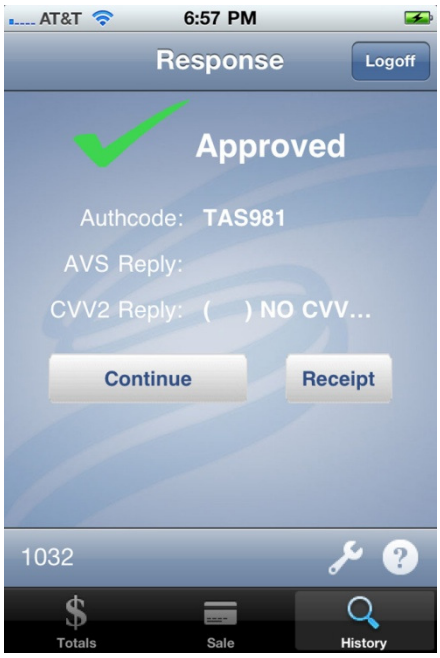
FORCE

A FORCE transaction completes an AUTH transaction. An AUTH transaction simply holds money on a card and does not actually charge that card. The FORCE completes the transaction with the final amount so that the card is actually charged.

SALE

A SALE transaction is like an AUTH and FORCE in a single command. It is the most popular transaction type. Use this command to place an additional charge on a card using the card number on file.

© Copyright 2011 by SLIM CD, Inc. ALL RIGHTS RESERVED



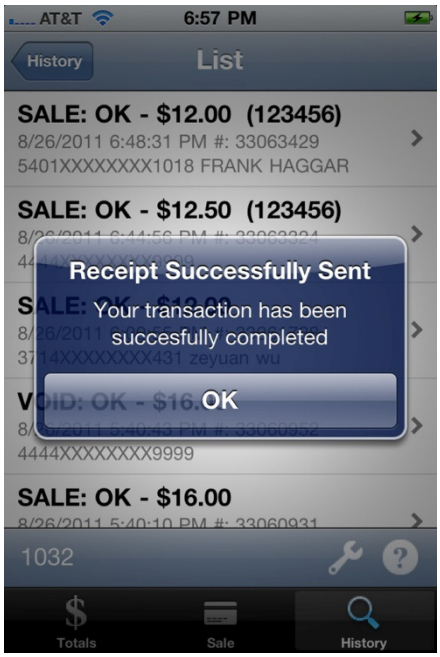
Approved Response

When the transaction is performed, the standard Approved or Declined response will be presented. The Continue button will return the user to the list of transactions. The user can then send a receipt, if desired.

Send Receipt

The standard Send Receipt options are available, including SMS Text, Email and CC Email to the merchant.

© Copyright 2011 by SLIM CD, Inc. ALL RIGHTS RESERVED



Receipt Sent

After sending a receipt, the list of transactions is represented so the user can perform additional operations.

© Copyright 2011 by SLIM CD, Inc. ALL RIGHTS RESERVED

Configuration

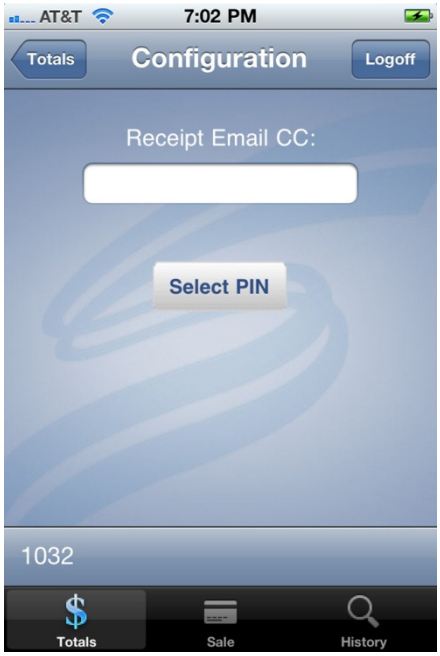
The User Name and the Configuration Wrench provide access to configuration screens. Tapping on these items brings up the associated configuration item.

User Configuration

Tapping on the User Name brings up User Configuration. The User Configuration allows you to specify the default CC email address for receipts (which is also the "from" address). You can also set/reset your quick login PIN.

CC Email Address

The email address entered here will be the default "from" address for receipts and will also be the recipient if you select the CC option.



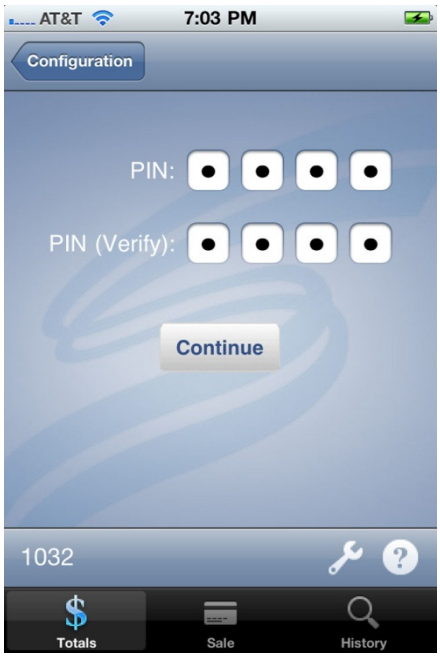
User Configuration Screen

From this screen, you can enter the default email address for the CC receipt or tap on Select PIN.

Select PIN

Tapping on the Select PIN option allows you to enter (or re-enter) your PIN to create the quick-login option.

© Copyright 2011 by SLIM CD, Inc. ALL RIGHTS RESERVED



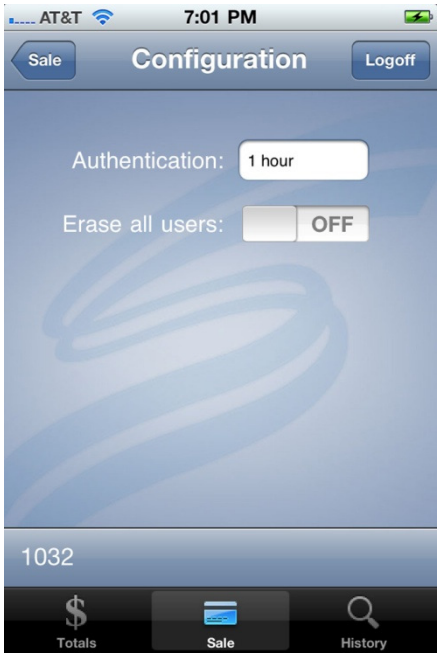
Select PIN

Selecting a PIN enables the PIN login capability for this user.

Administrator Configuration

Tapping on the Configuration Wrench brings up the Administrator Configuration screen. Administrators can set the default authentication timeout period for the app, or can erase all stored user data.

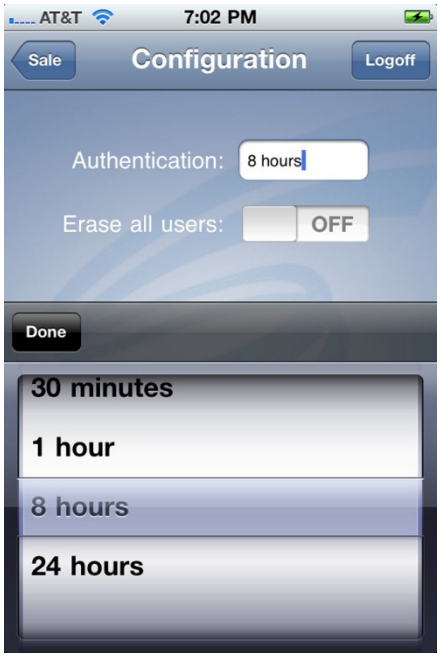
Authentication Timeout



Administrator Configuration Screen

 © Copyright 2011 by SLIM CD, Inc. ALL RIGHTS RESERVED

The Administrator Configuration Screen allows you to specify the authentication timeout period by tapping on the value displayed. The standard value selection wheel will be displayed.



Select PIN

Specify the time to allow users to keep the application running without logging back in. Tap on Done when finished.

Erase all users

This option will erase all user configuration data (User Name and PIN) from the device.

© Copyright 2011 by SLIM CD, Inc. ALL RIGHTS RESERVED

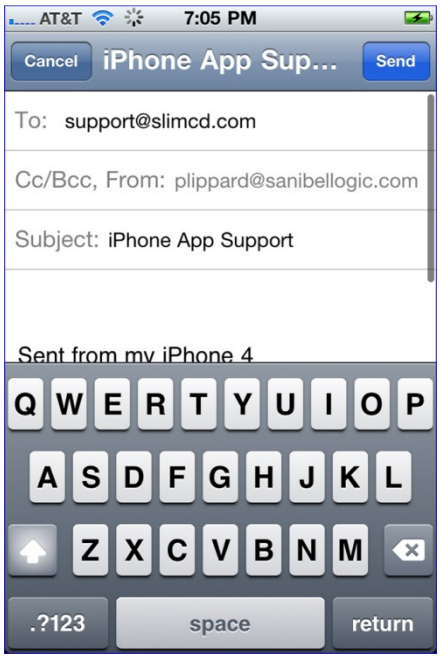
Help

The Question Mark symbol from the Status Bar launches the SLIM CD Help Services. These services include help by telephone, email or Internet.

Help Screen

Email Help

Tapping on the Email button allows you to send email from your iPhone to the SLIM CD Support Team.

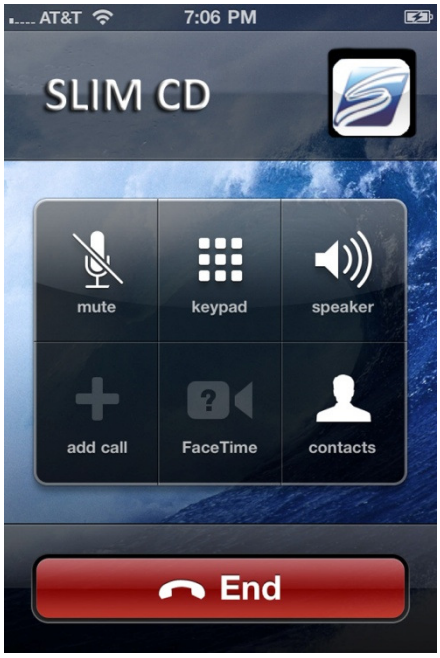


Email SLIM CD Support

© Copyright 2011 by SLIM CD, Inc. ALL RIGHTS RESERVED

Call Us Help

Tapping on the Call Us button allows you to place a call from your iPhone to the SLIM CD Support Team.



Call SLIM CD

Note that this function will not work on iPod Touch or iPad applications that do not have telephone services.

Internet Help

Tapping on the Browse button allows you to launch Safari and browse to the http://www.slimcd.com.

Browse slimcd.com

© Copyright 2011 by SLIM CD, Inc. ALL RIGHTS RESERVED

From here, you can log in and gain access to a wide variety of reports and features. You can perform additional searches, close batches, access additional transaction types, and more. In addition, there are other resources and downloads available from the slimcd.com website.

Additional Resources

For more information, please contact SLIM CD at (877) 475-3623 or email support@slimcd.com.

© Copyright 2011 by SLIM CD, Inc. ALL RIGHTS RESERVED