

## Charge Anywhere – Menu Settings and Tips

### Transactions:

Cash

Check

Credit – when in this part of the menu, you can do the following transactions

Sale - with swipe or manually

Auth Only

Force

Return

Void

### Reports:

Transaction Reports

(shows Cash/Check/Credit Totals)

Credit – tap on “+” for details of individual transactions

**PRINT a report** – hit your menu or actions key and select print report.

### Logs:

Current Day Log – tap on to see list of transactions

click on individual transaction to view

select “actions” or tap menu key

**Reprint** (Merchant receipt or Customer receipt)

Void

Archives - shows last 3 batches of transactions (to view more, go online)

Offline Transactions – will show offlines that have not been settled.

To settle, tap “actions” or menu key to send individually or send all.

Failed Offline Transactions

Auth Only Transactions

### Config:

Feature Options

Set-up

Optional Prompt –

Clerk/ Cust #/ Invoice #/ Tax

Transaction Settings –

Enable Signature/ Retry/ No Response Action/ **Enable Offline**/ Default Amount/

Quantity Prompt/ Purchase Cards/ Externals/ Swipe Option/ Show Subtotal

Peripheral Devices – to enable printer

Receipt Options –

Header/ Footer

Print Options

Approvals – Both Merchant and Customer copy is the default

Declines – Customer Copy Only is the default

Email Options

Advanced Options

Network

Application Mode

– can be put in “DEMO” but you take all risks for this – Betsey Kane/Credit Card Lady LLC not responsible if in Demo

Config Tender Types

GPS

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**FIRST:** Charge the device, preferably overnight. (Battery should hold about 400 transactions)

\*Get the appropriate settings for the device so that it can synch (P-25 device is turned on)

Bluetooth (not iPhone) – on your phone, go to settings/wireless/search for device and click on “BX...”, add it. Pin code can be found beneath the printer cover.

### **Registration:**

1. On your smartphone or iPhone/iPad, download the Charge Anywhere "app" from your app store.
2. Push the Arrow on the lower Left hand corner of the screen.
3. Push Enter Registration
4. **Then, enter license key** (sent by email) \_\_\_\_-\_\_\_\_-\_\_\_\_ (Case sensitive and include the dashes.)
5. The phone number for registration is normally the landline I have on file...or your cell – no dashes.
6. Pair the device to your phone or iPhone/Pad by choosing peripheral device. (Config/Setup/Peripheral)
  - a. for the swiper/printer, it will start with B1 or BX
  - b. for the audio jack swiper, it will start with UV.

### **Login:**

The user name to login on your phone is Owner – (case sensitive).

Your password must be 8 characters with one capital and one numeric...but no sequences (like abc or 123).

\*\*\* [www.chargeanywhere.com](http://www.chargeanywhere.com) - You can do transactions on this site too. This where you can find batches, history, etc. To login to their website, choose “ComsGate Transaction Manager” from the drop down menu located in the top right corner of the screen. Your user name is normally your first initial and last name; your password would have been emailed to you directly.

**Do a Test transaction!** - Please test the unit to make sure that everything is working and to make sure that you get an **approval**. Once you get the approval, call the help desk at 1-800-211-1246 to make sure that they can see the transaction as approved. \*\*If you do not get an approval, the transaction is either declined or not captured (i.e. no \$\$.)

### **Using the Card Swipe:**

Card Stripe on back of credit card should be facing you swiping through the bottom of the printer mechanism.

\*iPhone – data cord must be secure

\*Bluetooth – blue light should be on and it should indicate “connected” at the bottom of the screen on phone.

### **Offline Sales:**

This feature can be found by going to Config/Setup/Transaction Settings and then Enable/Disable Offline. Be sure to disable if you have been offline in order to insure that all transactions are authorized and captured for settlement. Call help desk if *at all* unsure.

### **To Reprint:**

Go to Logs/Current Day Logs, tap on individual transaction and select “actions” or menu key. Choose type of transaction.

### **To Print a Report:** (printer must be on and connected)

Go to reports and click your actions or menu key – it will give you the option to print reports.

Before you print, you can select report options and change the detail level to “short” rather than “full” if you’d prefer. (We recommend that you first print the full one and then print the short one just so that you can see the difference for future reference.)

### **Batches:**

Charge Anywhere will batch your transactions automatically between midnight and 4am Eastern Standard Time.

To confirm batches, call 1-800-662-8227, enter your “V” number and select either option 1 or 2 for your last batch(s).

### **Troubleshooting:**

Logout of the application on your phone and turn off the swiper/printer device.

Turn the device back on and login again (iPhone/iPad users, make sure that you are connected before you login again.)

Printer issues – make sure all connections are secure and/or blue light is displayed for Bluetooth users.

Bluetooth – first try tapping center of screen three times – phone should vibrate and connection should re-connect.  
(make sure that blue light is on!)

iPhone/Bluetooth – go into Configuration settings to reset Peripheral Device.

## **Charge Anywhere – Menu Settings and Tips**

Charge Anywhere Help desk is 1-800-211-1256, ext. 100. 9am-9pm Mon-Fri 9am-5pm Sat-Sun.