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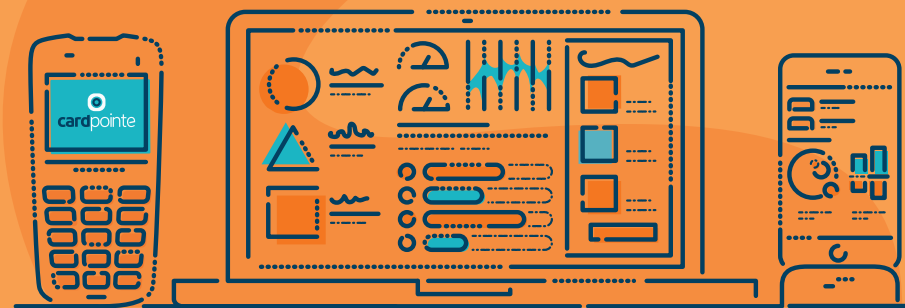


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[support.cardconnect.com/cp-terminal](https://support.cardconnect.com/cp-terminal)

Don't miss the best  
of CardPointe.



This terminal is integrated with the CardPointe desktop and mobile app so you can easily accept and manage transactions whenever, wherever your business takes you.

Visit [cardpointe.com](https://cardpointe.com) or download the app from the Apple App or Google Play stores.

 **cardpointe**  
MOBILE



Swipe or dip,  
anywhere.

Extend the power of the CardPointe platform to your smartphone or tablet for the ultimate on-the-go payments experience.

POWERED BY  
**cardconnect.**

VISA



 SUPPORTS EMV & NFC

# Your CardPointe Mobile Quick Reference Guide

## CARDPOINTE MOBILE VIRTUAL TERMINAL

### Sale

1. Tap the menu icon at the top left of the app and tap Virtual Terminal.
2. Enter the payment amount using the on-screen keypad.
3. Enter the sale amount and press ENTER.
4. Tap Proceed to Payment.
5. Select a Tender Type:
  - a. Processing a Credit/Debit Payment with Mobile Device.
  - b. Processing a Cash Payment.
  - c. Manually Entering Payment Details.
  - d. Processing Payment using a Bolt Terminal.
6. PROCESS a Credit or Debit payment with Mobile Device.
7. When prompted, insert, or swipe the customer's card.
  - a. The app displays the card reader status.
  - b. The payment details are updated with the captured payment information.
  - c. Optionally, select the Save Profile option to save the customer's payment information to a profile for future purchases.
8. Tap Process Payment.
9. On the Signature page, tap Bypass to skip the signature prompt, or have the customer sign their name on the screen with their finger then tap Proceed.
  - a. Optionally, do one of the following to provide a receipt
10. Tap Done to exit the transaction.

### Refund

1. Select the desired transaction from the list on the Transactions screen.
2. Tap REFUND at the bottom of the screen.
3. Enter a reason for the refund in the Refund Transaction pop-up and click OK.
4. A confirmation message displays when the transaction is successfully refunded.

### Void

1. Select the desired transaction from the list on the Transactions screen.
2. Tap VOID at the bottom of the screen. Please note, only transactions with a captured status can be voided.
3. Confirm whether you wish to proceed by tapping YES or NO.
4. A confirmation message displays when the transaction is successfully voided.

### Reports

The CardPointe app has various reporting features that enable you to view and manage your transactions.

- Transactions Screen - Displays all transactions that were processed on your account. You can also take specific actions on an individual transaction.
- Gateway Batches Screen - Displays a list of all batches for your account.
- Funding Screen - Displays a list of funding events for your account.

For additional instructions Go To: [support.cardpointe.com](https://support.cardpointe.com)