

Instructions for using the SchoolPay Virtual Terminal

Overview

There are two parts or steps in using the SchoolPay Virtual Terminal with your iPad:

- Downloading the App from the Apple Store
- Logging into SchoolPay and taking payments

Important Things to Know

There are a few things to know about using the SchoolPay virtual terminal:

- Works with iPad only, not the iPhone
- Works with iOS 7 and higher – if your iPad does not have that version of iOS you will need to do an update
- The Virtual Terminal only works with the UniMag II card reader you ordered from SchoolPay
- You will log into a new administrator module of SchoolPay – in the next few months, SchoolPay will be moving to a new version of the Administrator Module. The Virtual Terminal exists there now rather than building it in the old version and also in the new version.
- You can only take payment for things in the Virtual Terminal that have already been created (Payment Items).

Downloading, Launching and Logging In

1. Download the App

Go to the “Apps Store” and search for SchoolPay. You will only find the app if you are searching with an iPad. The app is free. Go through the normal install process.

2. Plug in the Uni Mag II Card Reader

You must plug in the card reader before you launch the app.

3. Launch the App

You launch the SchoolPay Virtual Terminal App in the same way as any other app, you simply click on it.

4. You will be taken to the SchoolPay.com login screen

This is important. The Virtual Terminal exists in the NEW version of the Administrator Module of SchoolPay. When you launch the app you will be taken to SchoolPay.com. You will login with your existing credentials (email address and password).

5. Launching the Virtual Terminal

To launch the virtual terminal you will click on a small icon that is part of each payment item listed on the screen. Clicking/tapping any item in the list will cause a series of icons to appear for each item. To launch the Virtual Terminal you will click on the icon furthest to the left.

Using the Virtual Terminal

The Basics

Using the Virtual Terminal is similar to using the Parent Center shopping cart. The same shopping cart is in the Virtual Terminal. Just like in the Parent Center, you can add multiple things to the cart for one check-out.

The first screen of the Virtual Terminal simply shows a drop-down list where you will find all of your payment items.

The process for paying is very similar to the process of paying in the Parent Center:

1. You select the item for which you want to take payment
2. You select the student for which the payment will be made – note you can type in the first few characters of the student’s name or ID to generate a list.
3. Depending on the payment item you might need to answer questions (for example, size or color) before you are finished adding the item to the cart.
4. Once finished answering any additional questions you can Checkout, Continue Shopping or Buy for Another Student.
 - a. Continue Shopping will take you back to the main screen to choose another Payment Item.
 - b. Checkout will take you to the checkout screens.
 - c. Buy for another student will allow you to take payment for the same item for another student.

Checking out and “Swiping” the Credit Card

As mentioned the checkout process is very similar to checking out in the Parent Center shopping cart. The difference is step 2 where the payment data is entered by “swiping” the credit card through the card reader. This difference is explained here.

On step two you will have the option to “swipe” the credit/debit card through the reader or to enter the data manually. The Virtual Terminal assumes that you will be swiping the card. Tap on “Manual” to enter the data manually.

To “Swipe” the card orient the card with the magnetic stripe in the groove of the Uni Mag II reader and facing the thicker part of the reader. You will notice that the slot in the reader separates a thicker and thinner part of the device. The magnetic stripe has to be facing the thicker part.

The reader comes with a plastic piece that connects to the bottom of the reader and assists in holding the reader in place while you swipe. Swiping smoothly and quickly is key for getting a “good swipe.”

If No Data Appears

If after “swiping” the card no data appears, ensure your card is oriented correctly and try to hold the reader still while “swiping.” If multiple attempts result in no card data appearing the magnetic stripe could be damaged and you will need to enter the data manually.

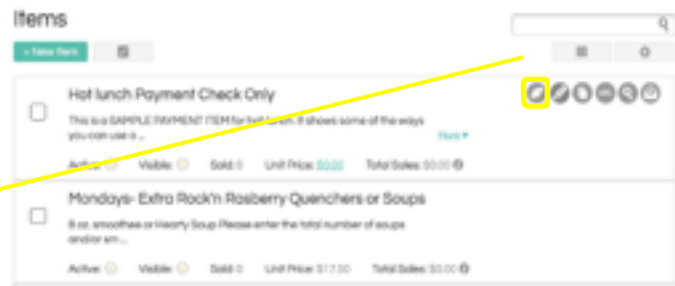
Screenshots

Main New Admin Module Screen (after logging in)

On this screen, click on the credit card icon to access the virtual terminal.

Tapping on an item will bring up 6 icons.

Click on this icon to launch the Virtual Terminal.



Step 2 of Checkout

This is the screen where you can input the payor's card information.

You can choose to either "Swipe" or manually enter the payment information.

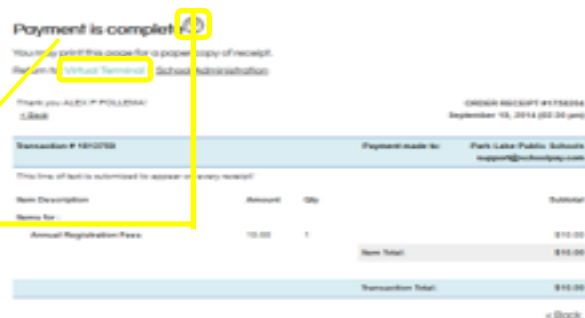


Payment Confirmation/Receipt

Upon successfully processing a transaction, you will be presented a copy of the receipt.

Click here to return to the first screen of the Virtual Terminal.

Click here to email a copy of the receipt to the payor.



Logging out of the SchoolPay Mobile Terminal



To log out of the SchoolPay Mobile Terminal, press the hard key home button on the bottom of your iPad twice. Your screen will zoom out and show every app that you have open. Find the SchoolPay Mobile Terminal App screen and swipe the app screen up to hard close and log out of the app.

If you are ever having difficulty within the SchoolPay Mobile Terminal App, it is advised that you hard close the mobile app and re-access the app from the beginning.

If you have any questions regarding the SchoolPay Mobile Terminal, or if you have any questions regarding SchoolPay in general, please contact us at support@schoolpay.com or (888) 886 – 9729.