



Mobile Merchant Reference Guide

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Revision History

Version	Date	Author	Description of Change
1.0	7/17/2013	N. McDermott	Document Created
1.1	8/20/2013	N. McDermott	Added new Invoicing functionality and revised all modified web pages.

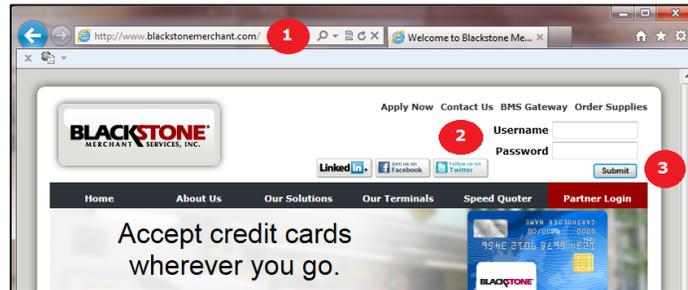
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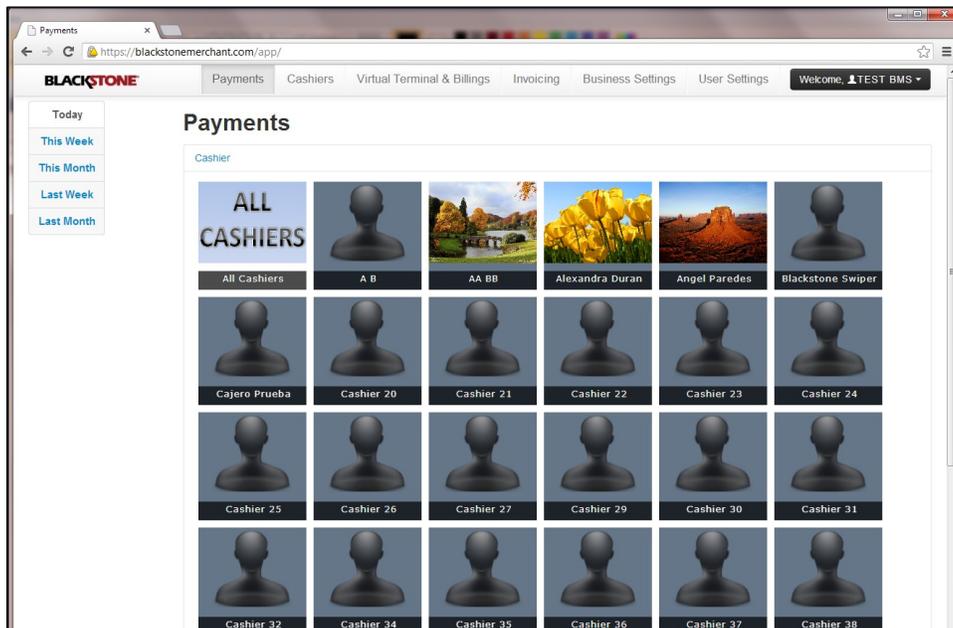
LOGIN

For best results, it is recommended that you login to the **Blackstone Mobile Merchant** website using a modern web browser, such as Internet Explorer 9 or higher, Google Chrome, Mozilla Firefox or Safari.

1. Login to <http://www.blackstonemerchant.com>



2. Enter your **Username** and **Password**, as provided in our welcome message.
3. Click **Submit**.
4. The **Blackstone Mobile Merchant Payments** page is displayed.

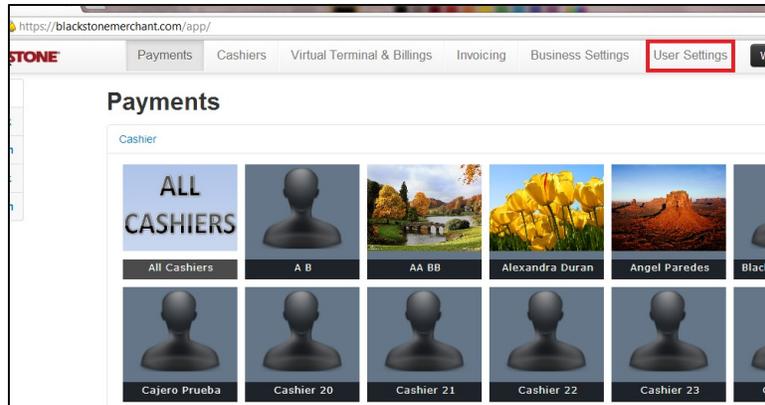


CHANGE YOUR PASSWORD

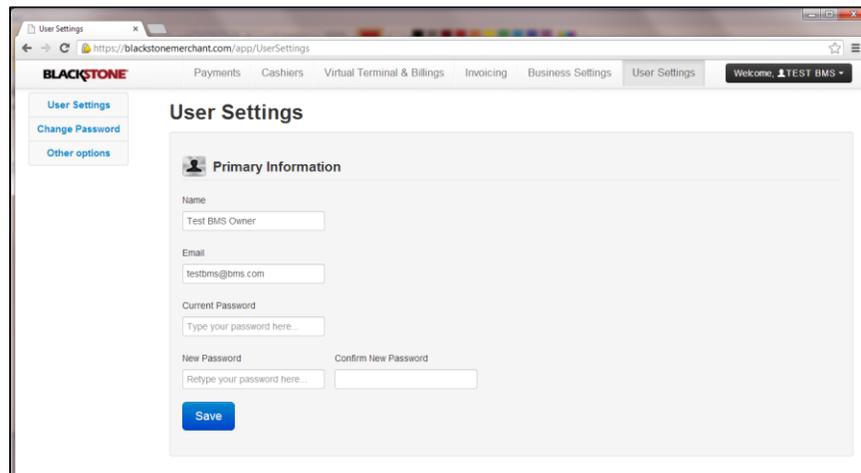
It is recommended that you change your password the first time you login to the Blackstone Mobile Merchant website. After that, you can change your password at your own discretion.

To change your password:

1. Click the **User Settings** tab.



2. The **User Settings** page is displayed.

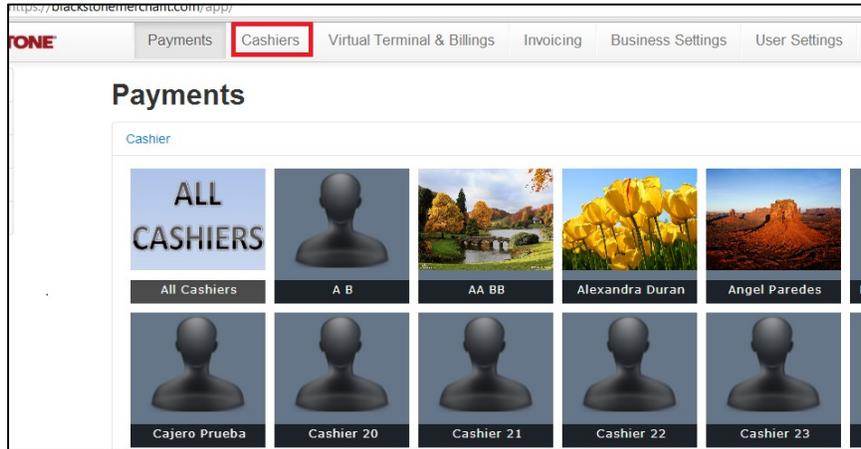


3. Enter the requested information, where:
 - a. **Name** is the name of your business.
 - b. **Email** is your business email address.
 - c. **Current Password** is your current password.
4. In the **New Password** field, enter the new password you wish to use.
5. Re-enter your new password in the **Confirm New Password** field.
6. Click **Save** to submit.

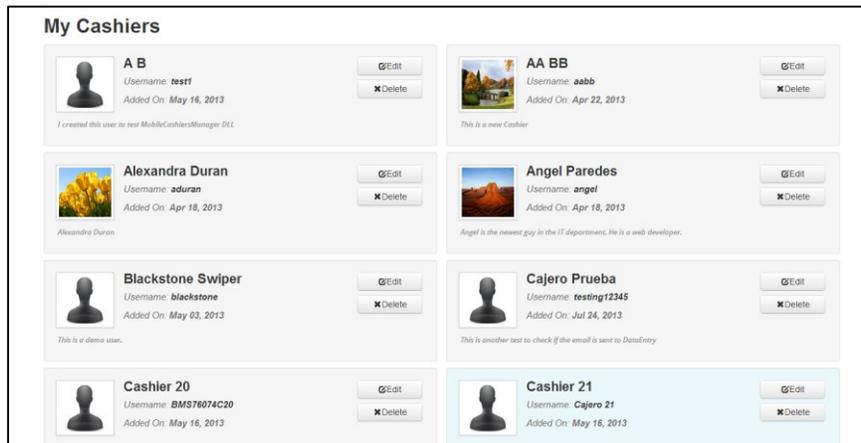
MANAGE CASHIERS

The **Cashiers** option allows you to view, add, edit and delete cashiers.

- a. Click the **Cashiers** tab.

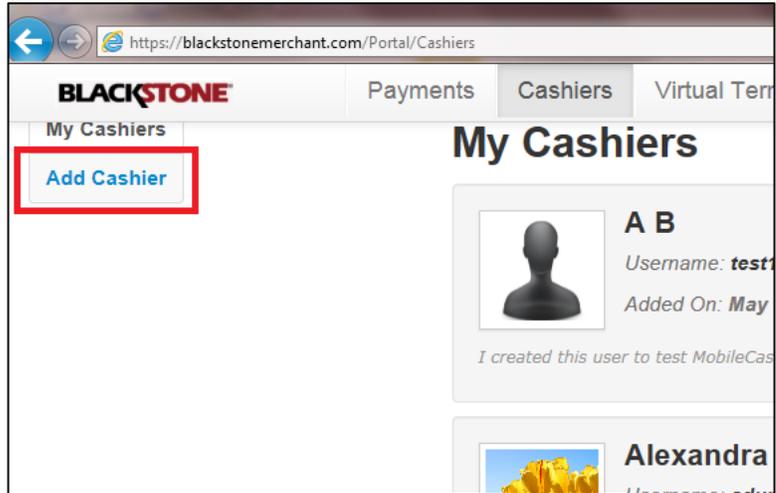


- b. All cashiers associated with your account are displayed.



Add a Cashier

1. Click **Add Cashier** on the left panel of the **My Cashiers** page.



2. Enter the required information.
3. Assign a **Username** and **Password**.
4. *Optional:* Click **Browse** to upload an image of the cashier. The image must exist in your file system.

Browse your file system for the desired image and double click it.

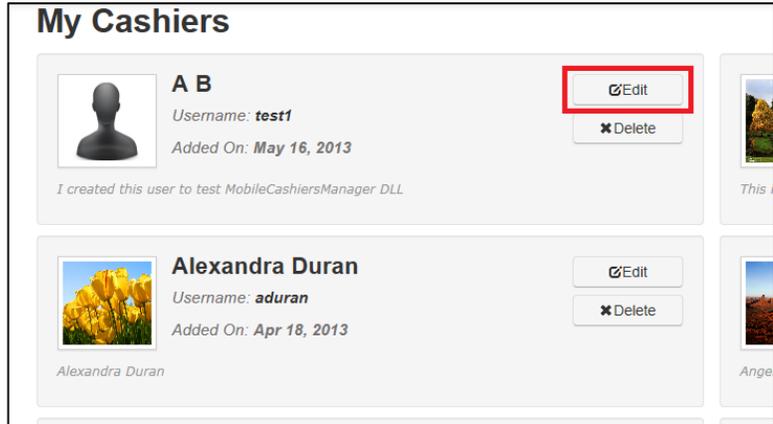
5. When done, click **Create Cashier**.

Note: You will receive notification from Blackstone Merchant Services once your request is executed.

6. Click **Back to List** to return to the **My Cashiers** page.

Edit a Cashier

1. Click the **Edit** button associated with the cashier you wish to edit.



2. Enter the information you wish to edit.
3. *Optional:* Click **Browse** to upload an image of the cashier. The image must exist in your file system.
4. When done, click **Save Changes**.

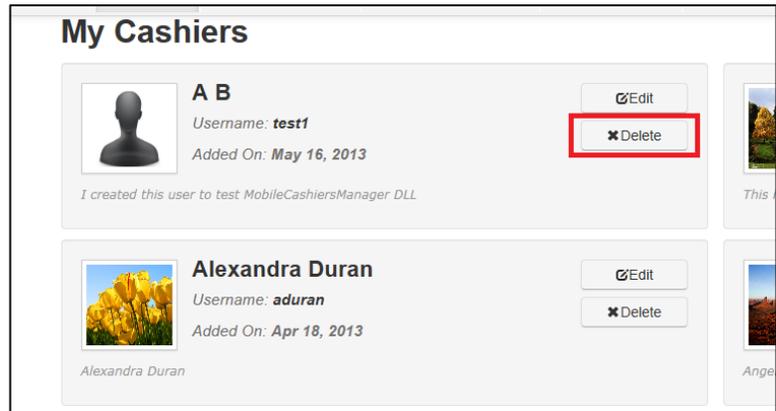
The 'Edit Cashier' form contains the following fields: First Name (Nitza), Last Name (Mcdermott), Username (nitza), New Password, Retype Password, and Description (This is a new cashier for Nitza). There is a 'Change Picture' label with a 'Browse...' button next to it. A 'Save Changes' button is located at the bottom of the form.

5. The message **Recently Updated** displays on the **My Cashiers** page indicating the cashier's profile was recently updated.



Delete a Cashier

1. Click the **Delete** button associated with the cashier you wish to delete.

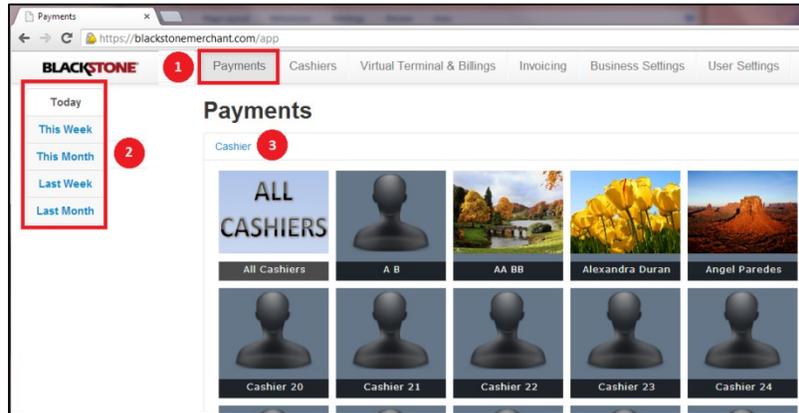


2. A confirmation message is displayed.

PAYMENTS

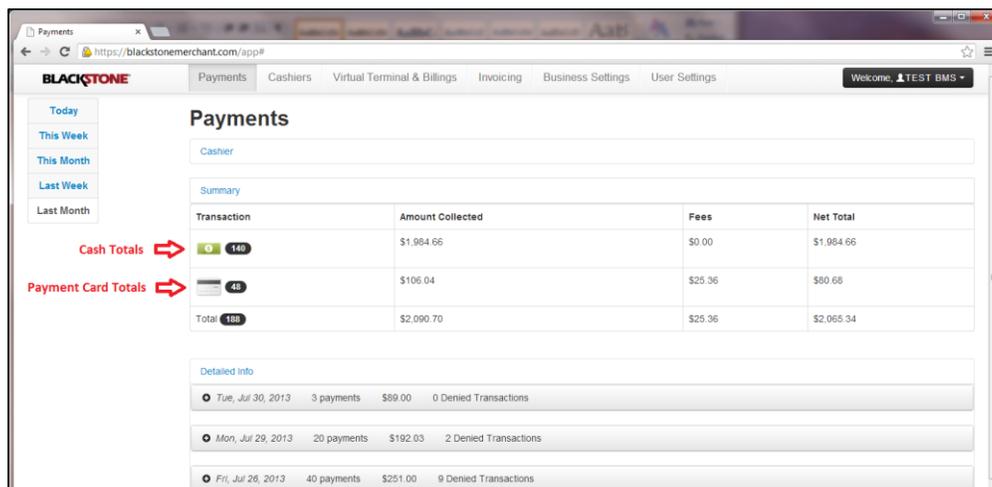
The **Payments** option allows you to view summary and detailed transaction activity. You can view transactions processed by all cashiers or by a selected cashier.

1. Click the **Payments** tab. The **Payments** page is displayed.



2. Select the time frame you wish to view from the options listed on the left panel.
3. You have the option to:
 - a. Click **ALL CASHIERS** to view transactions processed by all cashiers, or
 - b. Click a cashier image to view the transactions processed by the selected cashier.

Note: Depending on the number of cashiers associated with your account, you may need to scroll down the window to view the **Summary** and **Detailed Info**. You can also click **Cashier** to collapse the **Cashier** panel.



4. The **Summary** panel displays totals for:
 - a. Cash transactions
 - b. Payment card transactions
 - c. All transactions.

5. The **Detailed Info** panel displays totals by date.

Detailed Info			
Thu, Jun 27, 2013	1 payments	\$1.00	0 Denied Transactions
Wed, Jun 26, 2013	8 payments	\$3.03	0 Denied Transactions
Tue, Jun 25, 2013	1 payments	\$0.00	0 Denied Transactions
Thu, Jun 20, 2013	8 payments	\$42.00	2 Denied Transactions

6. Click the **+** button to expand the transaction details for a selected date.

Thu, Jun 20, 2013				8 payments	\$42.00	2 Denied Transactions
	02:56 PM		\$20.00			
	02:48 PM		\$1.00			
	02:48 PM		\$10.00			
	02:48 PM		\$4.00		Denied	Message indicates this transaction was denied
	02:47 PM		\$1.00			
	02:47 PM		\$10.00			
	02:42 PM		\$1.00		Refunded	Message indicates this transaction was refunded.
	02:23 PM		\$1.00		Refunded	
	02:21 PM		\$4.00		Denied	
	02:17 PM		\$1.00		Refunded	

7. Click a transaction on the **Detailed Info** panel. A pop-up window displays the details for the selected transaction.

Detailed Payment Info ✕

Payment Type → 8101

Date & Time → Thu, Jun 20, 2013 at 02:56 PM

Receipt Number → Receipt #: 18865580381337

Cashier → Cashier: Janet Sancho

Transaction Amount → \$20.00 (Swiped)

Net Amount Charged → **\$19.42**

Transaction Fee → \$20.00 original
-\$0.58 fee

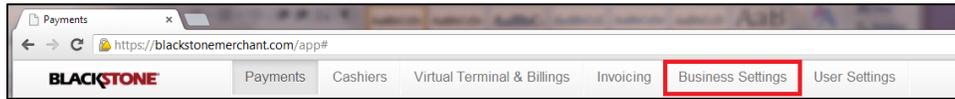
Customer's Signature →

Client's Signature

Close

BUSINESS SETTINGS

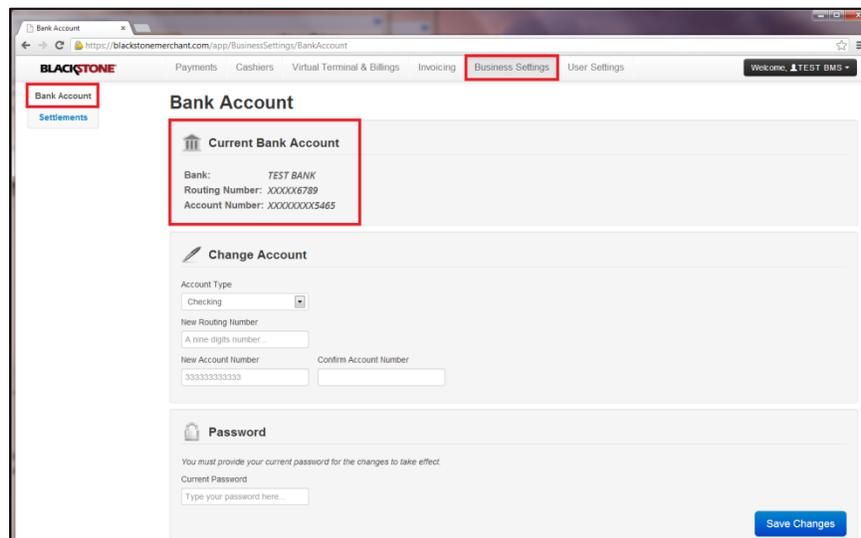
This option allows you to view and request changes to your bank account and transactions settlement settings.



Bank Account

To view your bank account information:

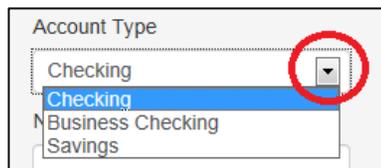
1. Click **Business Settings**.
2. The **Bank Account** page is automatically displayed. Your current bank account information is displayed on the top panel.



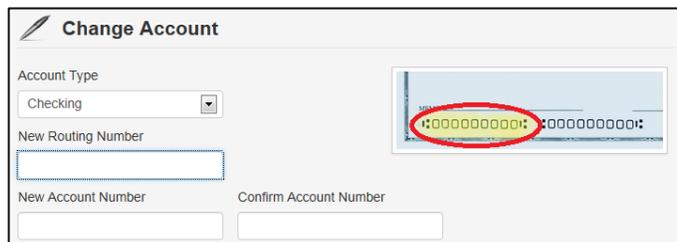
Change Bank Account

To change your bank account:

1. On the **Bank Account** page, click the **Account Type** drop-down button and select your new account type.



2. In the **New Routing Number** field, enter your Bank routing number. This is the 9-digit number located at the bottom left corner of your checks, as illustrated on the screen.



3. Enter your new bank account number in the **New Account Number** and the **Confirm Account Number** fields.

Change Account

Account Type
Checking

New Routing Number

New Account Number

Confirm Account Number

4. Enter your **Password** and click **Save Changes** to submit your request.

Password

You must provide your current password for the changes to take effect.

Current Password

Save Changes

5. A message displays notifying you that your request has been sent.

✔ Your request has been sent!

Your request may take a few days to take effect since it involves bank information processing. Until these changes are executed, you will continue using your current bank information.

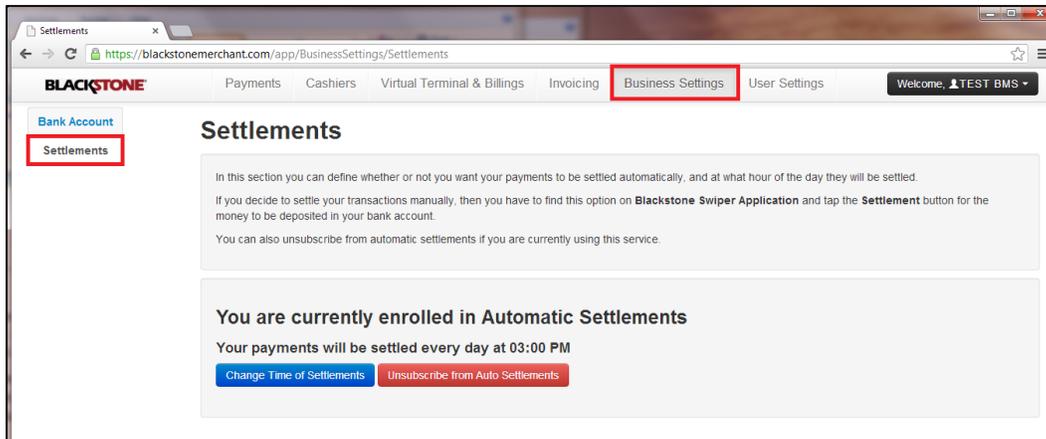
Note: Your request may take a few days to take effect since it involves bank information processing. Until these changes are executed, you will continue using your current bank information.

You will receive notification from Blackstone Merchant Services once your request is executed.

Settlements

This section displays your transactions settlement options and allows you to change your subscription from or to Automatic Settlements. Automatic Settlement means that your processed transactions will settle automatically (without manual intervention) every day at the specified time of settlement.

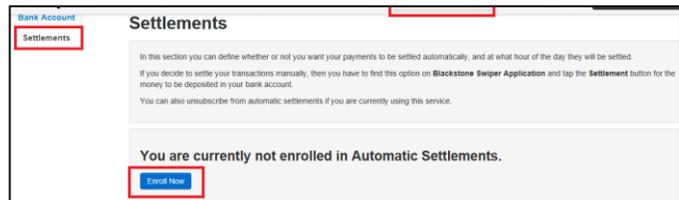
If you subscribe to Automatic Settlements, you have the option to choose the time of settlements. If you do not subscribe to Automatic Settlements, you have to find the **Settlements** option on the **Blackstone Swiper Application** and tap the **Settlement** button every day to settle your transactions.



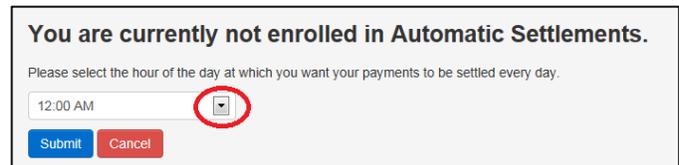
Subscribe to Automatic Settlements

To enroll in Automatic Settlements:

1. On the **Settlements** page, click the **Enroll Now** button.



2. Click the hour drop-down button.



3. Select the hour of day you wish to settle.

You are currently not enrolled in Automatic Settlements.

Please select the hour of the day at which you want your payments to be settled every day.

05:00 PM

12:00 AM
01:00 AM
02:00 AM
03:00 AM
04:00 AM
05:00 AM
06:00 AM
07:00 AM
08:00 AM
09:00 AM
10:00 AM
11:00 AM
12:00 PM
01:00 PM
02:00 PM
03:00 PM
04:00 PM
05:00 PM
06:00 PM
07:00 PM
08:00 PM
09:00 PM
10:00 PM
11:00 PM

4. Click **Submit**.

You are currently not enrolled in Automatic Settlements.

Please select the hour of the day at which you want your payments to be settled every day.

05:00 PM

Submit **Cancel**

5. A pop-up window is displayed to confirm your request. Click **Yes** to confirm.

Enroll in Automatic Settlements ×

Are you sure you want your payments to be settled every day at **5:00 PM**?

Yes **No**

6. Your **Automatic Settlements** enrollment options are displayed.

You are currently enrolled in Automatic Settlements

Your payments will be settled every day at **05:00 PM**

Change Time of Settlements **Unsubscribe from Auto Settlements**

Change Time of Settlements

This function is available only if you are enrolled in **Automatic Settlements**.

1. On the **Settlements** page, click the **Change Time of Settlements** button.

You are currently enrolled in Automatic Settlements

Your payments will be settled every day at **05:00 PM**

Change Time of Settlements **Unsubscribe from Auto Settlements**

2. Click the hour drop-down button.

You are currently enrolled in Automatic Settlements

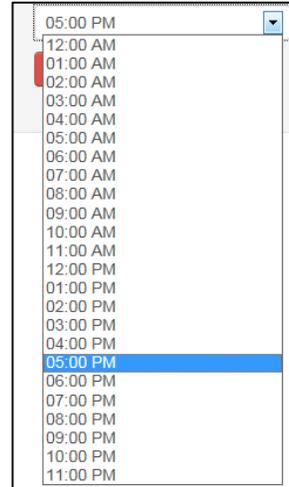
Your payments will be settled every day at **05:00 PM**

Please select the new hour of the day at which you want your payments to be settled every day.

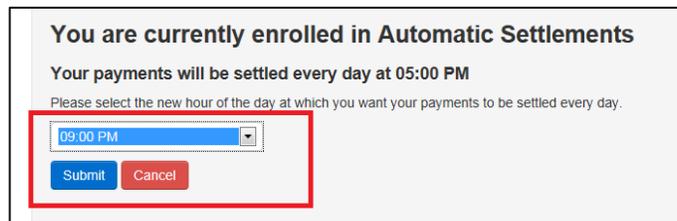
05:00 PM

Cancel

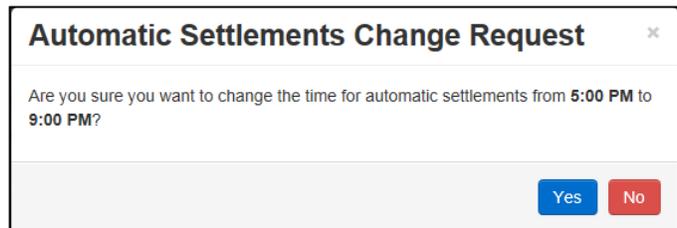
3. Select the hour of day you wish to settle every day.



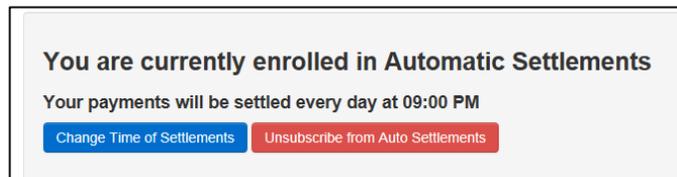
4. Click **Submit**.



5. A pop-up window is displayed to confirm your change request. Click **Yes** to confirm.



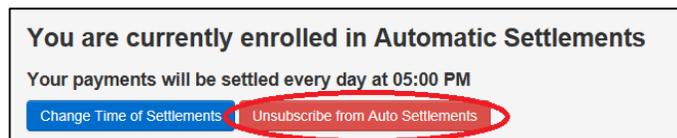
6. Your **Automatic Settlements** enrollment options are displayed.



Unsubscribe from Automatic Settlements

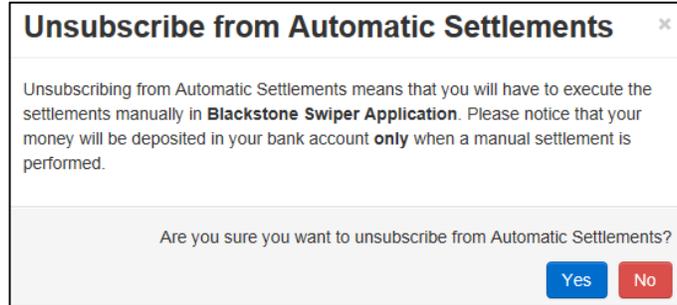
This function is available only if you are enrolled in **Automatic Settlements**.

1. On the Settlements page, click the **Unsubscribe from Auto Settlements** button.



2. Read the displayed notice before you continue.

Note: If you unsubscribe from Automatic Settlements, you will have to execute the settlements manually in the **Blackstone Swiper Application** to have your payments deposited in your bank account.



3. Click the **Yes** button to confirm your request or **No** to cancel.

4. The **Settlements** page displays your selected options.



VIRTUAL TERMINAL & BILLINGS

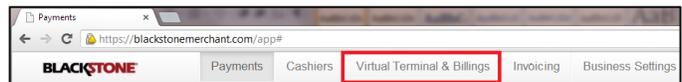
This option provides the following functions:

- Process payments using the Virtual Terminal
- Add Recurring Billing
- View Active Billings
- View Bill Payments History
- Exceptions List – Lists any recurring billings that failed at the time of payment.

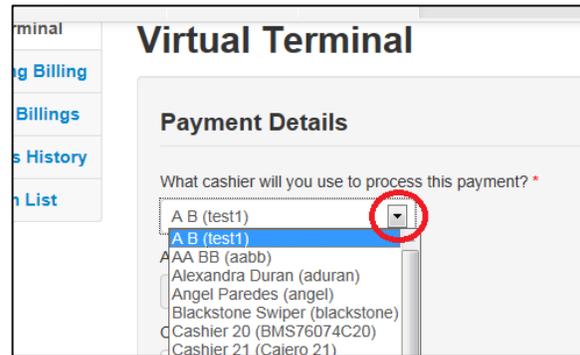
Process Payment

To process a payment using the **Virtual Terminal** function:

1. Click the **Virtual Terminal & Billings** tab located at the top of the window.



2. Click the cashier drop-down button and select the cashier you will use to process the payment.



3. Enter the payment details.

Note: When you click a payment card field, a payment card image displays highlighting the location of the required information.

4. Enter the customer's billing information.

Note: This section is not required to process a payment transaction but is recommended. A receipt is sent to your customer when the Email address is entered. The receipt will include the payment description entered in the **Payment Details**.

Billing Information (We encourage you to fill the following fields)

Customer Id

Street

City

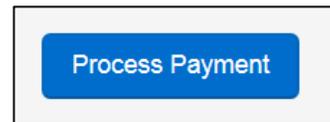
Zip

Email to send receipt

Invoice #

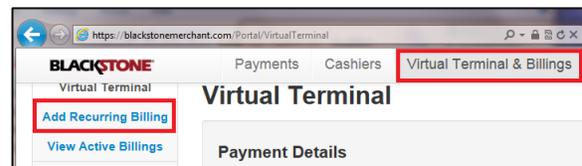
PO #

5. Click the **Process Payment** button located at the bottom of the page to submit the payment.



Add Recurring Billing

1. Click the **Virtual Terminal & Billings** tab located at the top of the window.
2. Click **Add Recurring Billing** on the left panel.
3. The **Add Recurring Billing** page is displayed.



Note: There are two types of billings available:

- a. **Recurring** – A predetermined payment amount is charged on each billing cycle.
- b. **Installment** – The payment amount is calculated by dividing the total amount due by the installment count.

BLACKSTONE Payments Cashiers Virtual Terminal & Billings Busi

Virtual Terminal **Add a Recurring Billing**

Add Recurring Billing View Active Billings Bill Payments History Exception List

Billing Details

Select Type of Billing
 Recurring Installment

Select Frequency
 Daily

Starts On *

Ends On

Description *

4. For **Recurring** payments:
 - a. Select **Recurring**.
 - b. Click the **Select Frequency** drop-down button and select the payment frequency.
 - c. Click the calendar button associated with the **Starts On** field and select the payments starting date.
 - d. Click the calendar button associated with the **Ends On** field and select the payments ending date.
 - e. In the **Description** field, enter a payment description. The description entered is included in the receipt that is sent to your customer when an email address is available.

5. For **Installment** payments:
 - a. Select **Installment**.
 - b. In the **Installment Count** field, enter the number of installment payments.
 - c. Click the **Select Frequency** drop-down button and select the payment frequency.
 - d. Click the calendar button associated with the **Starts On** field and select the payments starting date.
 - f. In the **Description** field, enter a payment description. The description entered is included in the receipt that is sent to your customer when an email address is available.

6. Enter the **Payment Details**.

Note: When you click a payment card field, a payment card image displays highlighting the location of the required information.

7. Enter the **Client Details**.

8. Click **Save Billing** to submit.

Client Details

First Name *

Last Name *

Street *

City *

State *

Armed Forces - AA

Zip Code *

Phone *

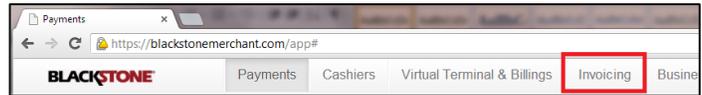
Email *

Save Billing

INVOICING

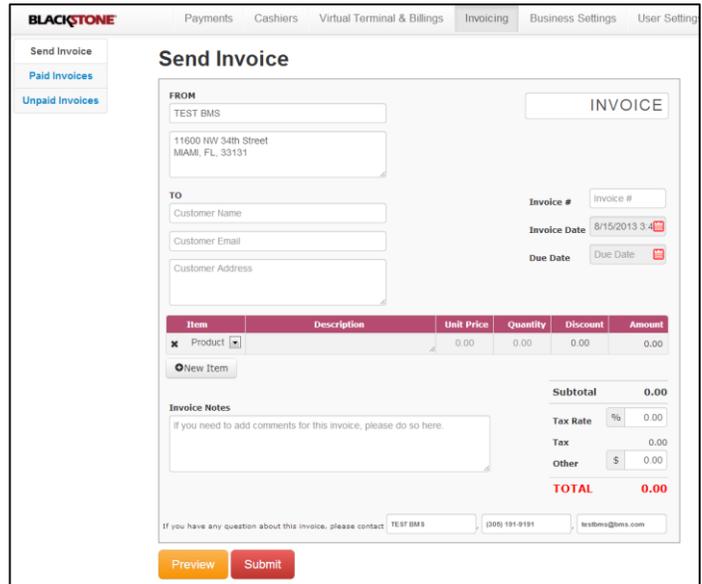
Send Invoice

1. Click the **Invoicing** tab located at the top of the window.



2. The **Send Invoice** page is displayed.

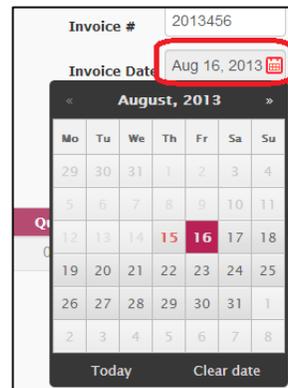
The **FROM** field contains your merchant account name and address. If necessary, you can enter any changes by simply typing over the information.



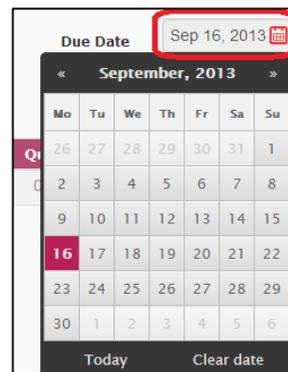
3. In the **TO** field, enter the **Customer Name** and **Email** address. These are required fields. The **Customer Address** is optional.

4. In the **Invoice #** field, enter an invoice number.

5. Click the **Invoice Date** field and select the invoice date from the dropdown calendar.



6. Click the **Due Date** field and select the invoice due date from the dropdown calendar.



7. If the invoice is for a service, click the **Product** dropdown button and select **Service**.

8. In the **Description** field, enter a brief description for the invoice item.

9. Enter the **Unit Price** and **Quantity** for the line item.

10. If applicable, enter the discounted amount in the **Discount** field.

11. The total amount for the line item is automatically calculated and displayed in the **Amount** field.

12. If you need to add more items, click the **New Item** button. A new line item is displayed. Repeat steps 7 to 11 to add the item.

13. To add a sales tax, enter your **Tax Rate** as a whole number.

14. In the **Other** field, you can enter any other charge amount.

15. In the **Invoice Notes** field you have the option to add comments.

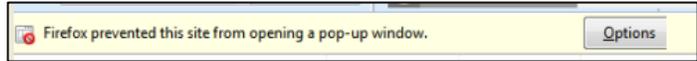
16. Verify your contact information at the bottom of the invoice.

If you need to make any changes, you can edit the information by simply typing over it.

17. Click **Preview** to preview the invoice.

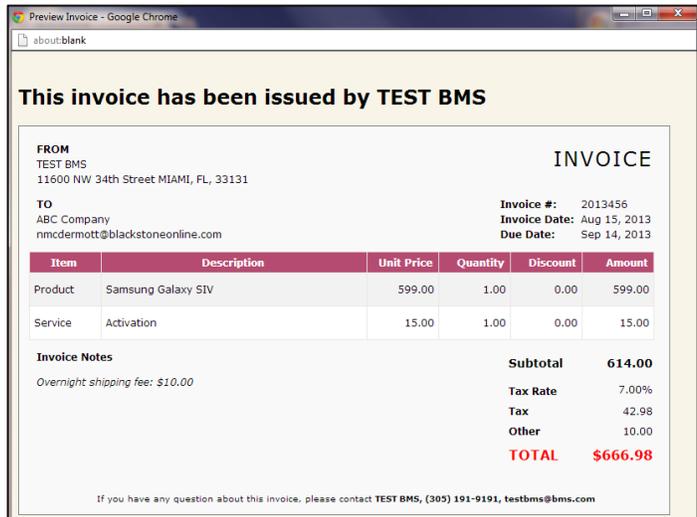


Note: If the message “Your browser *prevented this site from opening a pop-up window.*” appears at the top of your window, click the displayed **Options** button and allow access.

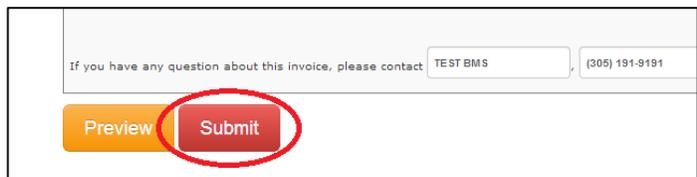


18. A **Preview** of the invoice is displayed in a pop-up window.

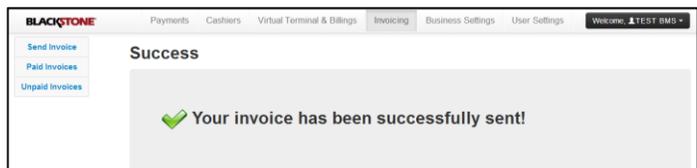
Close the pop-up window to proceed.



19. When done, click **Submit**.

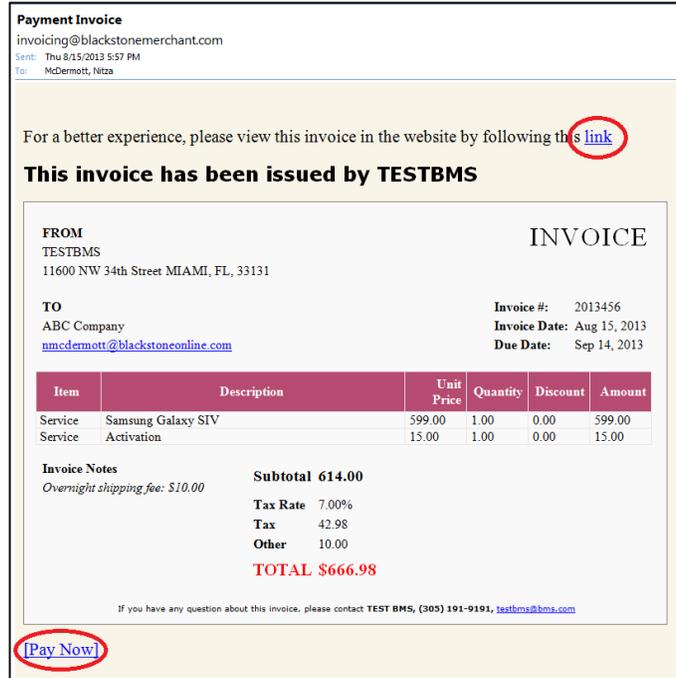


20. A message is displayed confirming the invoice was successfully sent.

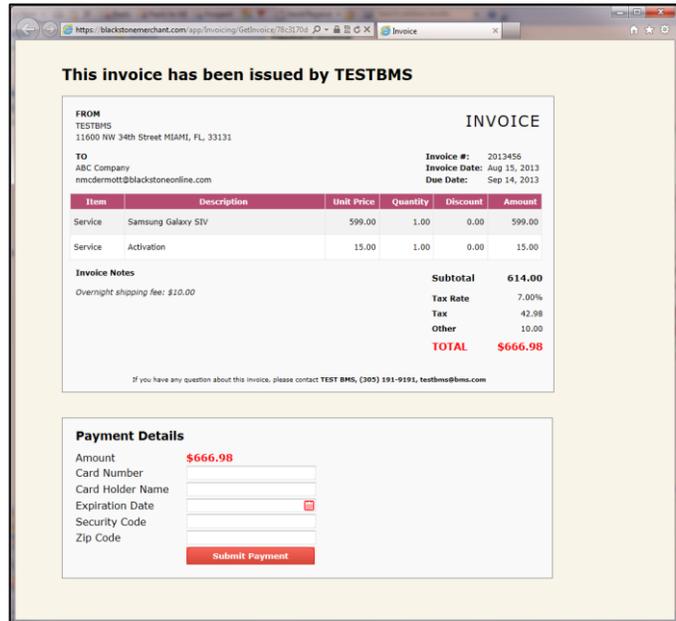


Customer Receives Invoice

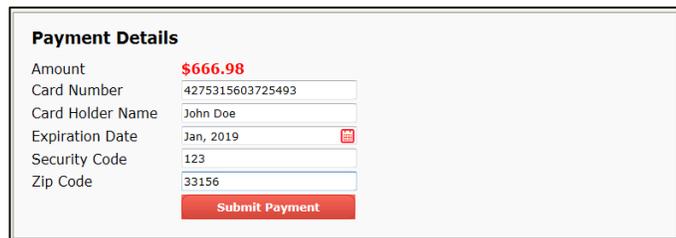
- Customer receives invoice via email. The customer is instructed to click the link to view and pay the invoice in the Blackstone Merchant website.



- The Blackstone Merchant window opens displaying the invoice with the **Payment Details** in the lower panel.



- The customer enters the payment information and submits the payment.



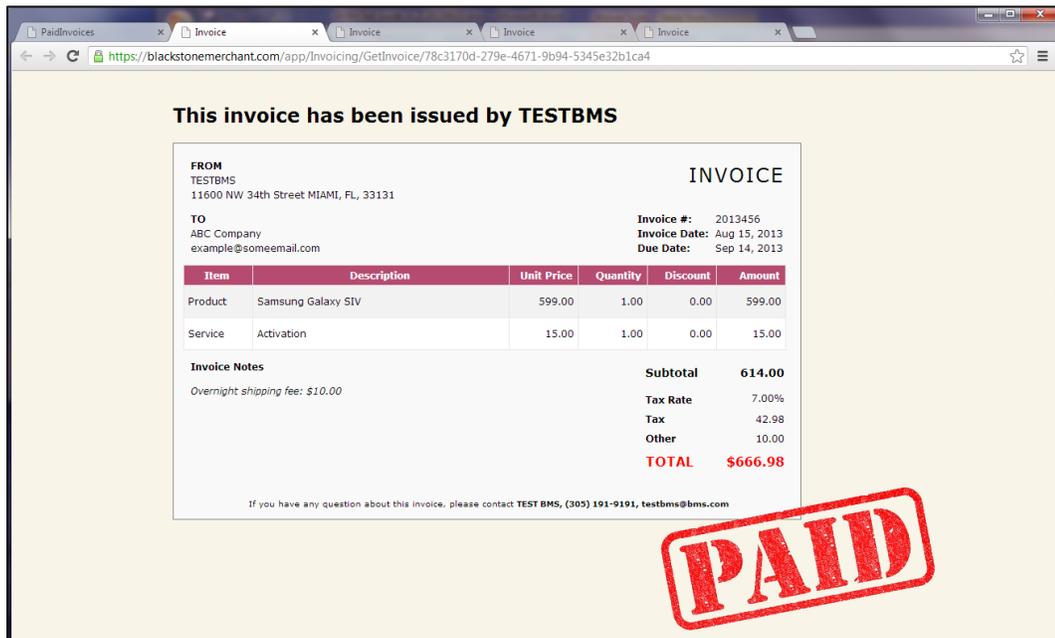
Paid Invoices

1. On the **Invoicing** page, select **Paid Invoices**.



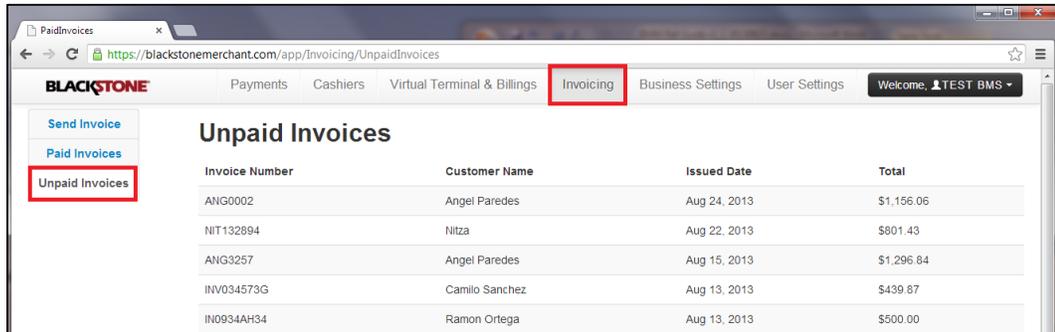
2. Select an invoice from the displayed list to view the invoice details.

A new window opens displaying the selected invoice.



Unpaid Invoices

1. On the **Invoicing** page, select **Unpaid Invoices**.



2. Select an invoice from the displayed list to view the invoice details.

A new window opens displaying the selected invoice.

