# mPOS User Guide

Before the Start of an Event

Security

- You will receive a password for the iPad and for the mPOS system. Do not share this information.
- Both the iPad and mPOS will log you off after an idle period of time. When this occurs, log in again and continue using the application.
- The iPad is for mPOS use only. It is not be used for email, browsing, or any other uses other than mPOS.
- The password has to be changed every 25 days. To do this select reset password during login.
- iPADs are AARP assets and no additional applications are to be loaded. Doing this could be a potential security risk and place credit card information at risk.

Prior to Opening

1. Tap and open the mPOS system and make sure you can log in. If not, make sure that you have Wi-Fi or cell phone access.
2. Start the mPOS system and check to make sure the correct **State** is set to default. If not:
   i.   Select the three lines at the top left corner of the screen and then **Settings**.
   ii. Now tap the where it says **Default State** and select a state at the bottom.
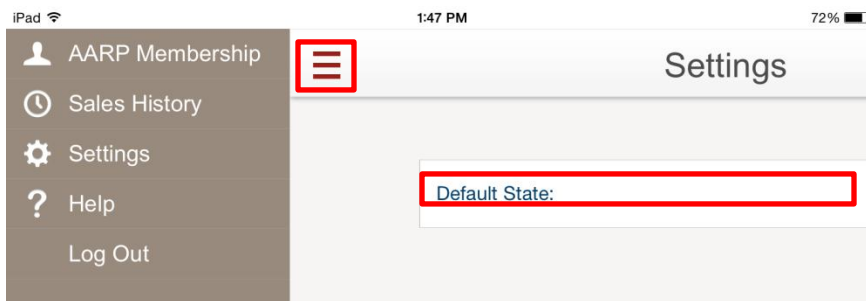
General Instructions

- **Manual Credit Card input** – This is not available through mPOS.
- **Existing Members** – This is for New members only. If someone wants to renew their membership, have them call 1-888-OUR-AARP (1-888-687-2277).
- **New Member Welcome Kits –** should be received in about 2 – 3 weeks.

Need Help?

If you are having an issue with:

- Password needs to be Reset if you have a password lockout.

Contact the **help desk at 888-925-2002**, open a work order, and ask that it be assigned to the **mPOS AARP Events queue**.

If you are having any issues with the mPOS app:

a. This **mPOS User Guide** is available within the mPOS application by:
   i. Returning to the membership page and Tapping the **three lines** at the top left corner of the screen.
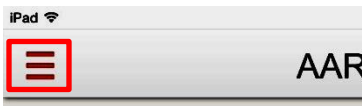

   ii. Tap **Help** and the Help screen will appear with the user manual.
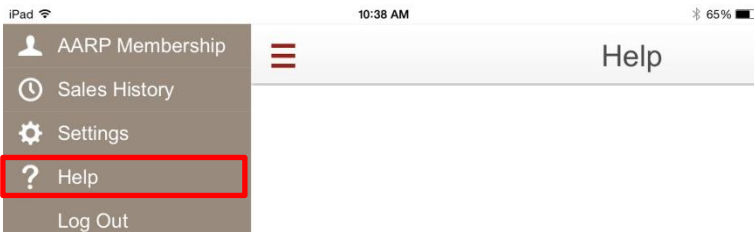
b. Contact your DSO representative or email your questions to: DSOHelp@aarp.org . Please reference **mPOS** in the subject line so that the email gets routed quickly.
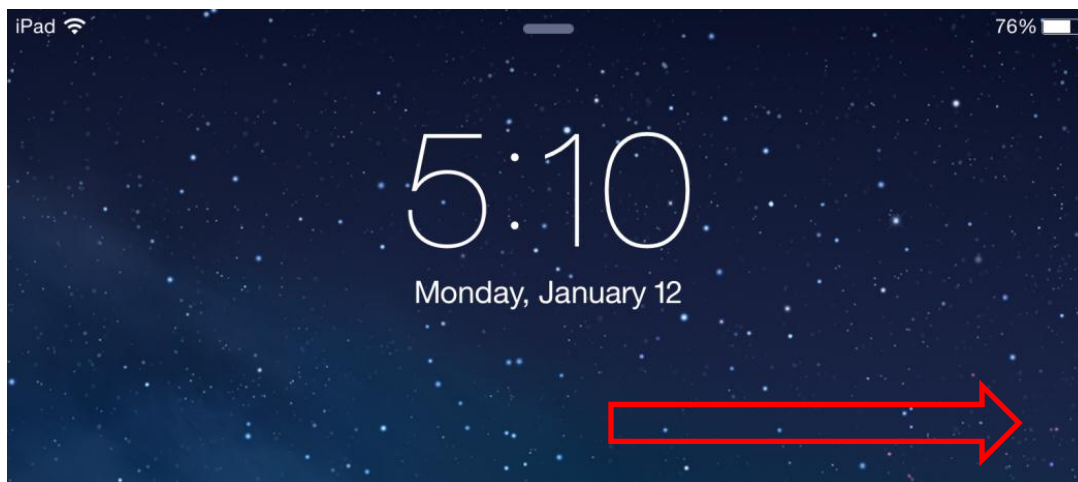
Access and Login

1. Before starting the mPOS application insert the card reader into the audio jack at the top left portion of the iPad. You will feel the reader snap into place when correctly inserted.
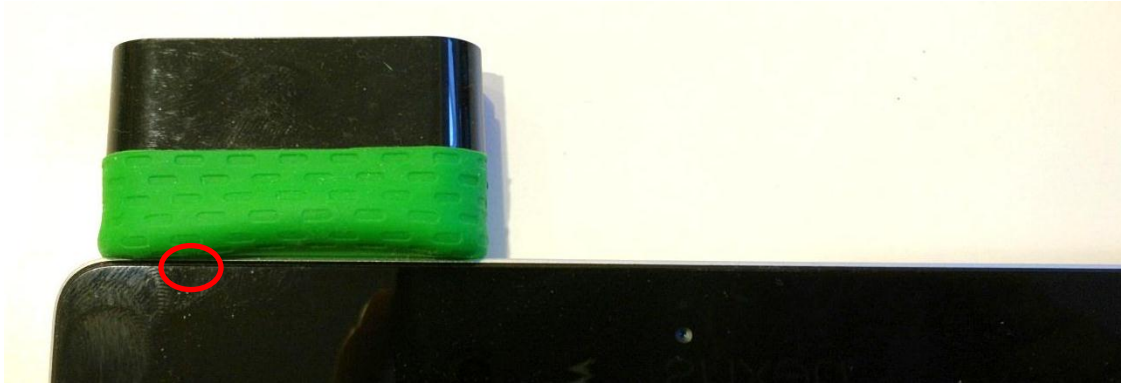
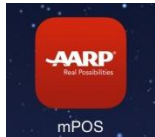2. Turn on the iPad by pushing the button on the top right, behind the screen.

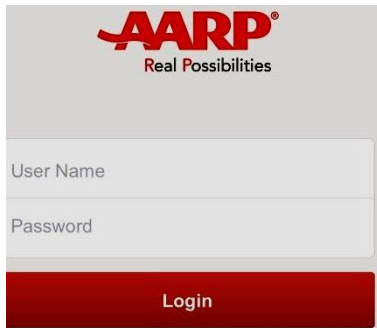3. When the Date and Time appear, place you finger on the screen and swipe to the right.

4. Enter the iPad's passcode.

5. Navigate to the mPOS application by swiping to the right or left and tapping the mPOS icon.

6. Enter your login name and password.

> **NOTE:** For security purposes, the application automatically logs off after a period of inactivity. When this occurs, re-log in.

7. The mPOS application is now open. Check the bottom left corner of the screen for the Reader symbol. If it says **Reader**, you are ready to go. If it say's **No Reader**, press the Credit Card Reader into the hole until you feel it click.

 Good   Retry inserting Reader
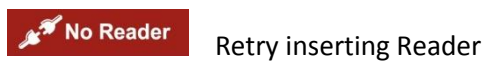
Using mPOS

1. When you first log in you will see the offer page, tap whichever offer the member requested and then **Done**.
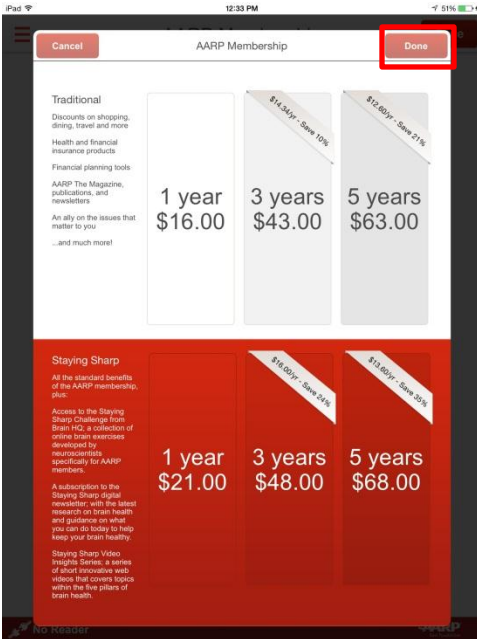
> **NOTE:** mPOS times out quickly and logs you out **UNLESS** an offer is selected. Therefore, whenever on the offer screen to **select ANY offer** and go to the Membership page. mPOS will then not timeout/logoff for a long period of time.
>
> To change the offer at any time tap the **Membership Type**, and select.

2. You are now on the AARP Membership page.
   a. Tap **First name** and then enter the member's first name.
   b. Tap **Last name** and enter the member's last name.

> **NOTE:** If the member changes their mind and wants a different offer, tap the **Membership Type** currently listed. This will take you back to the offer page.
> **NOTE:** When typing a members name a suggested word may pop up. Click the **X** to close it and make sure the name you entered is correct.

4. Tap the **Date of Birth** field and swipe up or down on the **Month, Date and Year**. Once you have the correct date, tap outside of the date Callout. The date will fill into the field.

> **NOTE:** If a member requests to include their middle name, a title or suffix click **Add Name Details** to add this additional information.

5. If you would like to add a Spouse name, select **Add Spouse** and complete the name information.
6. Add the Address (this is the **Mailing address** NOT the billing address).
   a. Tap the **Address line 1** to enter the street address.
      i. If you would like to add an additional address line, select Add Address Line
   b. Tap and enter the **City**.
   c. The default **State** is already filled in. If you would like to change the state, tap Select on the right side of the State line and select another state.
   d. Enter the **Zip Code**.

> **NOTE:** Remember to enter the **Mailing Address** and not the billing address here.

7. Add the email address on the Email line
   a. Tap then type the address again on the Email Confirm line
   b. If a member does not have an email address or does not want to provide an email address, skip this step.

> **NOTE:** Let the member know that the **receipt** for this transaction will be sent to this email address.

8. To add a phone number, tap **Add Phone Number** and then type in the phone number *without* dashes.
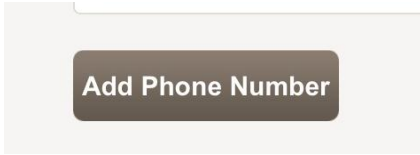
Add Phone Number

NOTE: Phone number is not a required field but is useful in contacting the member if there is an issue with the membership application.

9. If the member wishes to receive membership information in Spanish, tap the button to the right of "**Wishes to receive correspondence in Spanish**".

Wishes to receive correspondence in Spanish
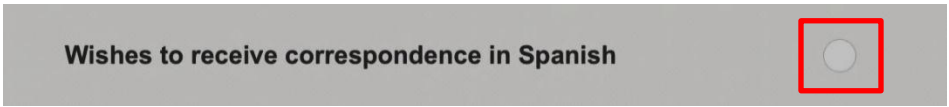
10. Click **Save** at the top right of the screen.

iPad   1:10 PM   59%

≡   AARP Membership   Save
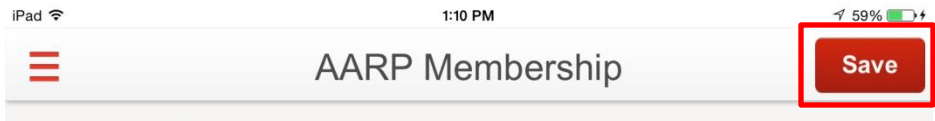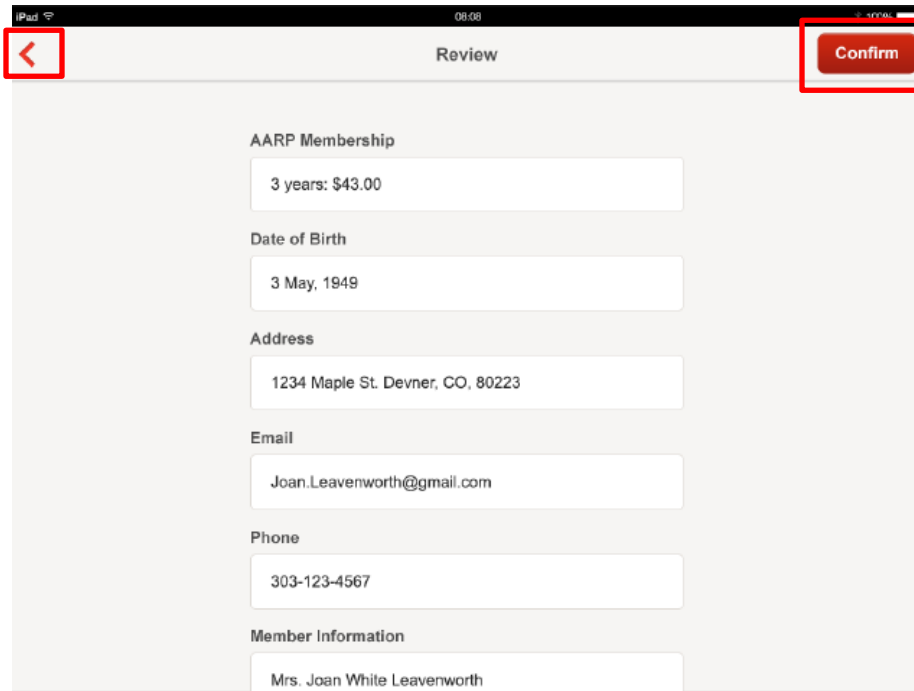
NOTE: If all of the information has not been completed, you will receive a message asking you to **Please Complete All Fields.**

Bel air

Alabama, AL

Zip code

Please complete all fields

11. You are now on the **Confirm Page**.

    a. If you need to change any information tap the back button **<** at the top left corner of the screen.

    b. If all of the information is correct, ask the member for a **credit card and drivers license**. If the drivers license and credit card are a match;

    c. tap **Confirm** in the upper right corner of the screen.

12. A prompt to swipe the card will appear. Swipe the credit card at this time.
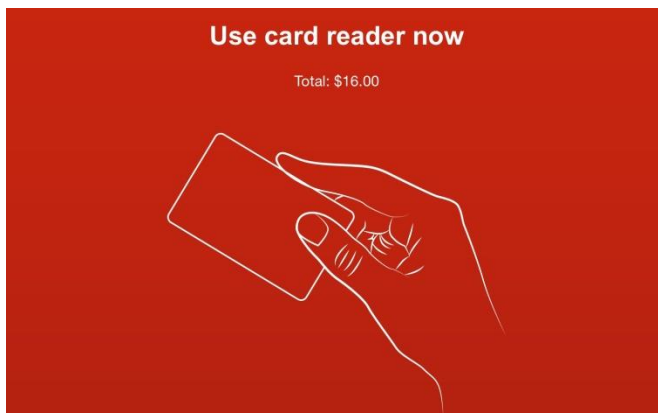
NOTE: Insert the credit card with the magnetic strip on the bottom facing the two arrows on the credit card reader.

NOTE: If a credit card is not swiped or can't be read within 30 seconds, the application will time out. Click **OK**, return to the Confirm Details screen and retry again.
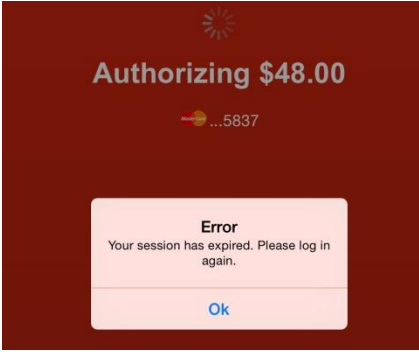
13. The Signature page will appear. Have the new member **sign their name using their finger**. Once this is done tap the **Authorize** button.
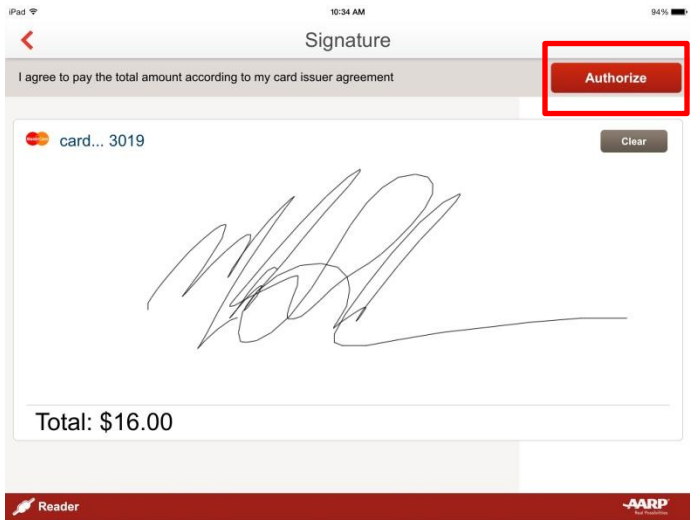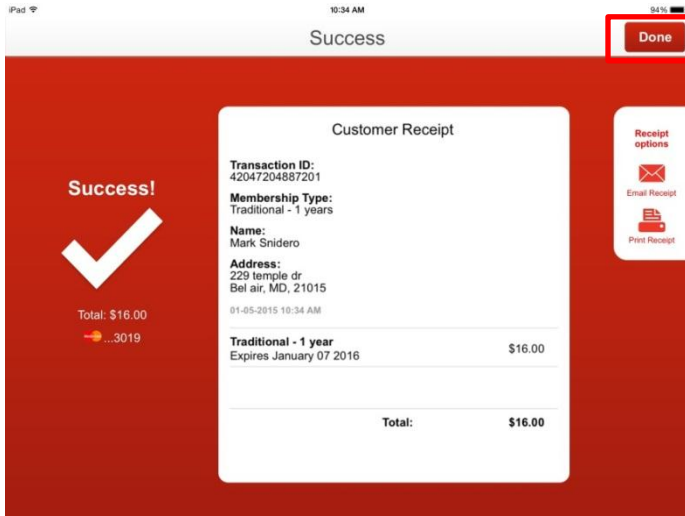


14. The **Authorizing Page** will appear briefly.

15. Upon Success, the transaction completion page appears. At this point you can:

   (a) **Done** – Click this option to complete this transaction and go back to the membership options page.

b. **Email Receipt** – This will email a receipt of the transaction to the email address included during sign up. Once selected, you will see the below screen. Click **Send**.
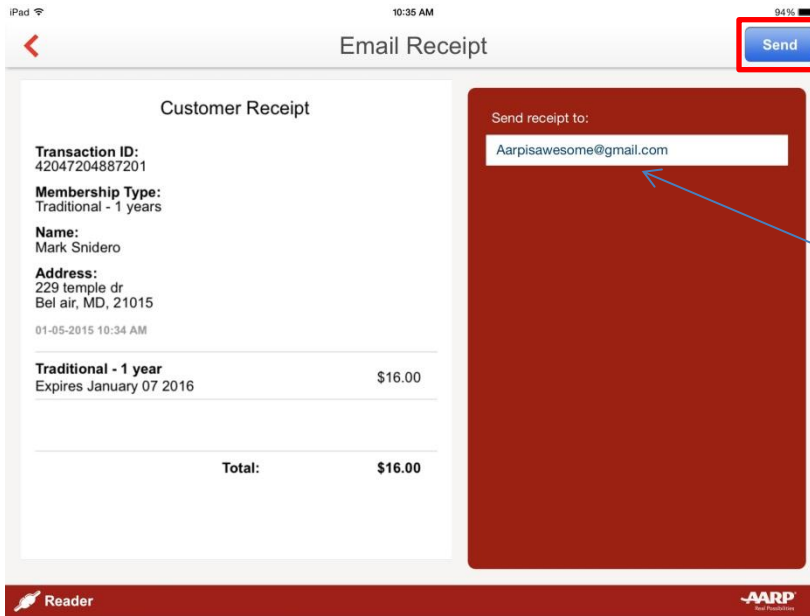
NOTE: If a member wished to have the receipt sent to a different address, you can change that under **Send receipt to:** on this screen.

    i. After clicking send you will see the following pop-up confirming a receipt was sent. Click **Ok**.
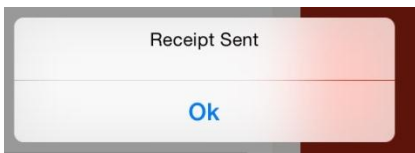
Voids/Refunds

# Voids on Same Day of Membership Purchase

A member can receive a void on the same day the credit card was used for purchase. Since charges are not processed until that evening, this is a true void since the payment has not been processed. To void a purchase:

1. Tap on the 3 lines in the top left corner within the mPOS application

NOTE: mPOS screens use the term Refund. In AARP's case, this is a VOID since the transaction has not yet been processed.

2. Tap **Sales History**
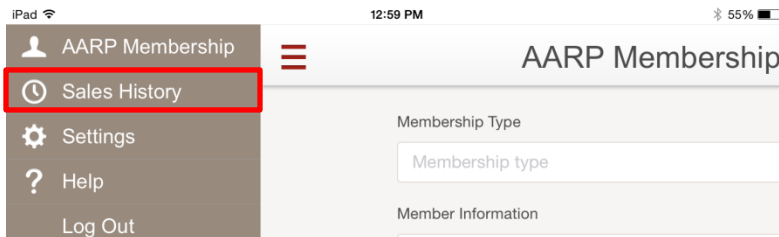
3. Tap **Reference Number**. You will have a list of options to search for the purchase:
    a. **Reference Number** – this is the Reference Number on the receipt emailed to the customer.
    b. **First and Last Four –** this is the first and last 4 digits of the members credit card.
    c. **Last Four** – This is the last 4 digits of the credit card used for the transaction.
    d. **Last Name** – The members last name exactly as it what typed into the member application.
   e. **All On This Device** – This will display a list of all purchased from this device.
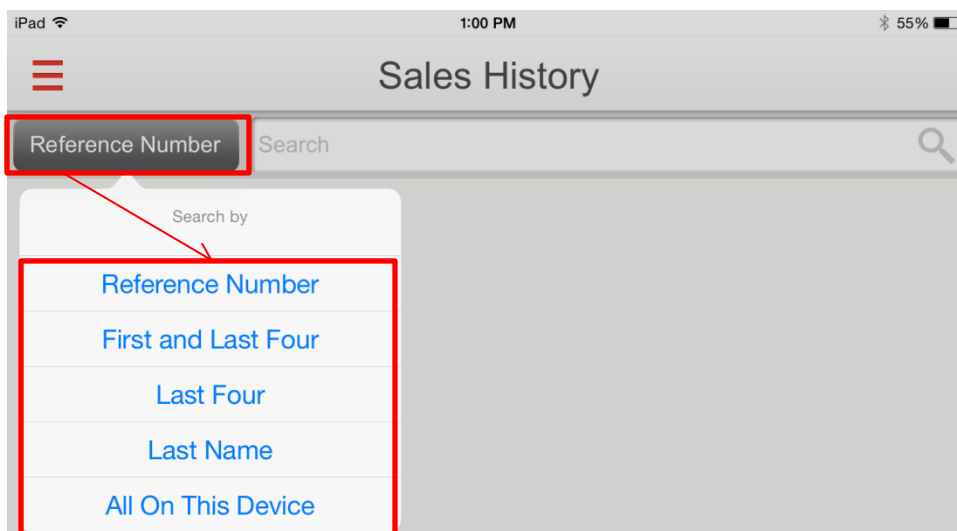
NOTE: It is recommended to use the **All On This Device** selection. However, transactions will not be in any particular order so you may have to flip through the list.
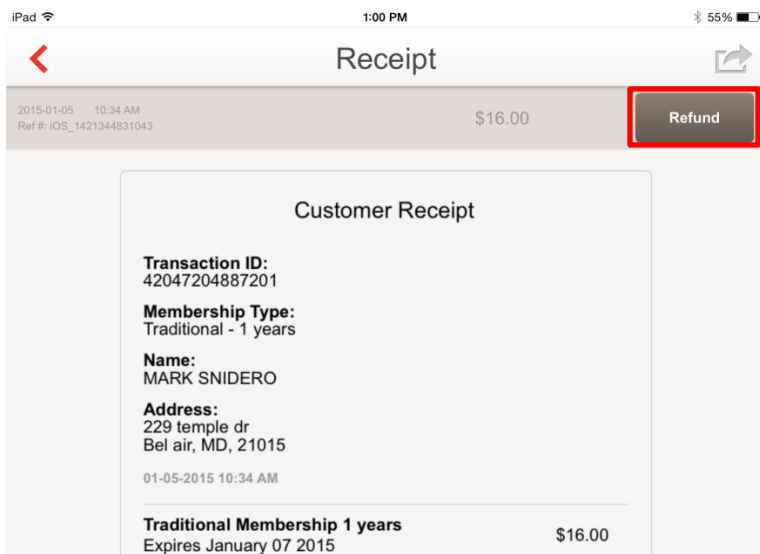
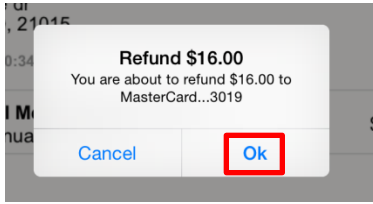4. Once you have selected an option and then tap the search icon (magnifying glass).
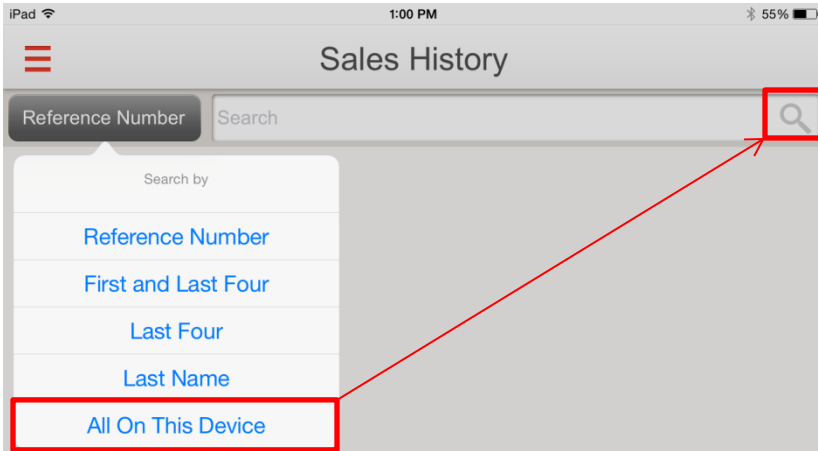
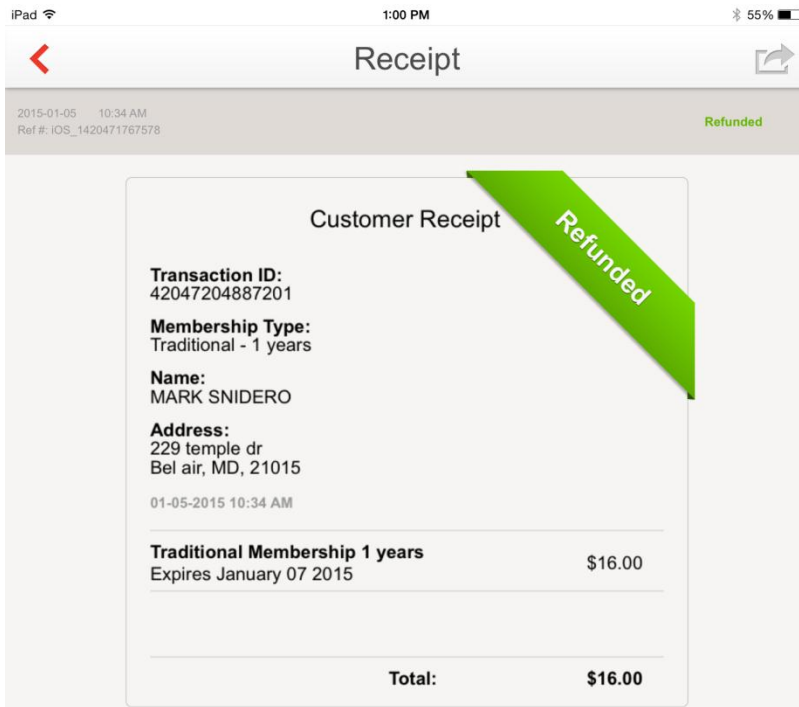5. In this example I have selected **All On This Device.** Tap the transaction that you wish to Void.
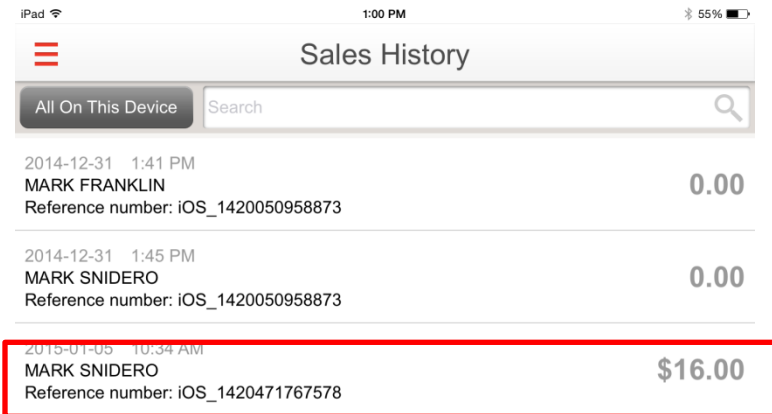
6. The transaction will display. Click Refund.

7. A confirmation screen will pop up asking whether you want to Refund the transaction. Select Ok.

8. The Success screen appears. The Refund has been applied to the transaction. Click the back arrow ❮ to return to the Sales History.

NOTE: Since the transaction has been voided, the member will not see the Void on their credit card statement.

9. Once on the Sales History screen tap the three lines at in the left upper corner to return to the menu and select AARP Membership to return to the membership screen.
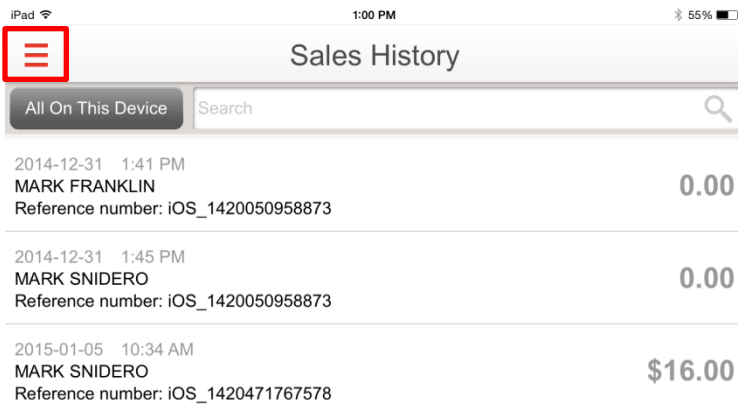
Voids/Refunds After the Day of Membership Purchase

- You cannot void or provide a refund for a purchase via the mPOS terminal after the end of day when the purchase was made.
- All refunds from the day after purchase forward need to be made through the call center. A member can contact the call center 48-72 hours after the purchase to request a refund.