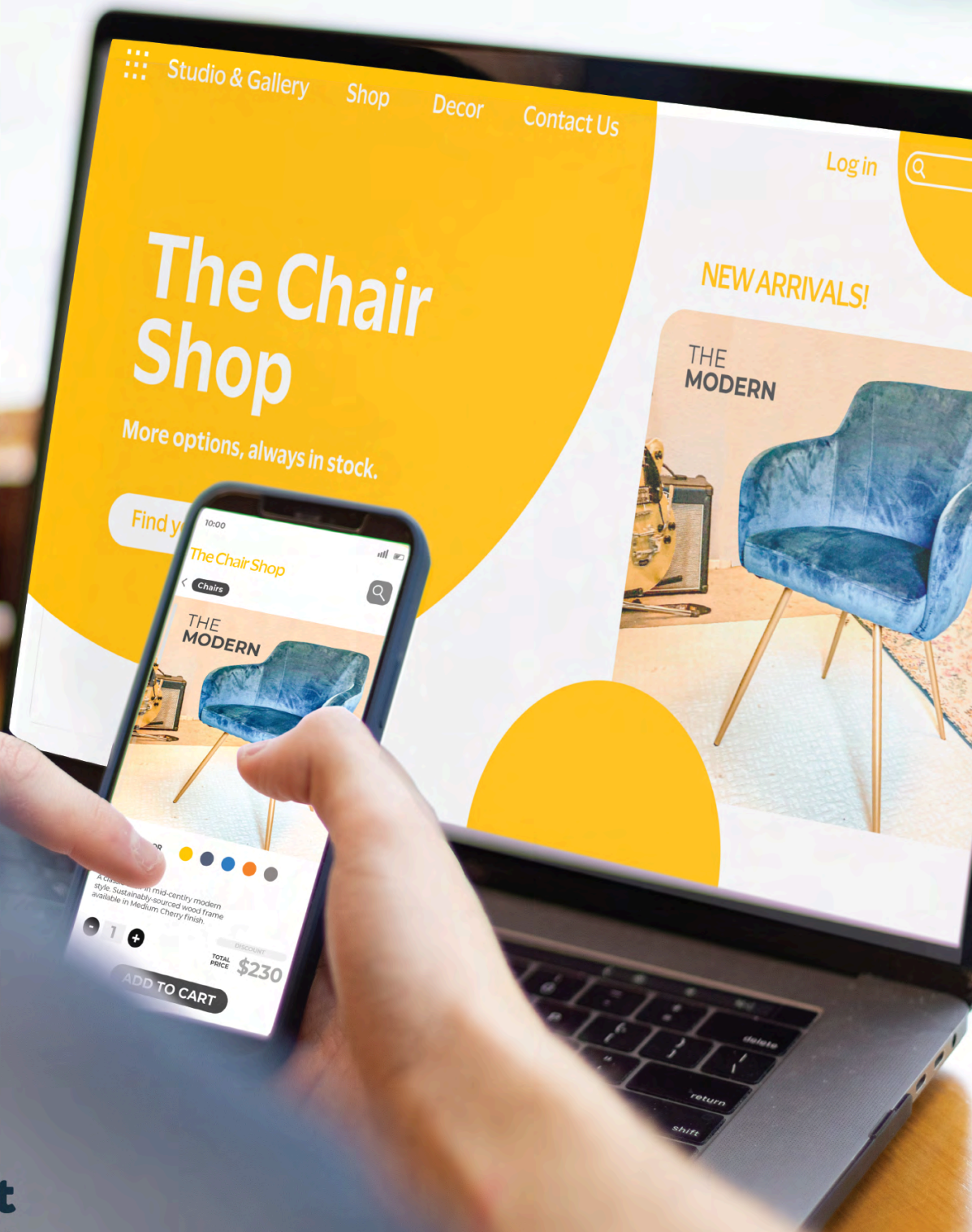


Authorize.net 2.0 App Guide



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Authorize.net 2.0 App Guide

This section describes this guide and where to find further information.

Audience and Purpose

This guide is intended for merchants who want to use the Authorize.net 2.0 App. It explains how the various modules work and how to perform basic tasks.

Conventions

This statement appears in this document:



Important: An *Important* statement contains information essential to successfully completing a task or learning a concept.

Customer Support

For support information about any service, visit the Authorize.net Support Center:

<http://support.authorize.net>

Recent Revisions to This Document

25.10.1

Updated Tap to Pay information for Android devices.

See [Using Quick Pay \(on page 6\)](#), [Accepting Payment for Items in Your Catalog \(on page 7\)](#), [Payment Methods \(on page 9\)](#), and [Enabling Tap to Pay on Android Devices \(on page 15\)](#).

25.7.1

Added Tap to Pay as a payment method.

See [Using Quick Pay \(on page 6\)](#) and [Payment Methods \(on page 9\)](#).

25.5.1

Added Transactions.

See [Viewing and Managing Transactions \(on page 11\)](#).

Updated Quick Pay functionality.

See [Using Quick Pay \(on page 6\)](#).

Added support for catalog items.

See [Managing Your Catalog \(on page 16\)](#) and [Accepting Payment for Items in Your Catalog \(on page 7\)](#).

Added support for cash transactions.

See [Payment Methods \(on page 9\)](#).

Added card reader updates.

See [Updating the Card Reader Firmware \(on page 15\)](#).

Added setting for the default landing view for payments.

See [Setting the Payments Default Landing View \(on page 22\)](#).

Various minor updates.

25.01






Initial release.

Payment

Use the Payment feature to accept payments with payment cards or cash.

Using Quick Pay

Follow these steps to accept a payment for any amount:

1. Tap **Payment**.
2. Tap the amount field and enter an amount.
3. Enter a description in the **Description** field.
4. Tap  and  to adjust the quantity.
5. Tap **Add to cart**.
6. Repeat Steps 1-5 for each item.
7. Tap . The Review Order screen appears.
8. Review the order:
 - a. Tap  and  to adjust the quantity for each item.
 - b. To delete the item, lower the quantity to 1 and then tap the red trash can icon.
 - c. If more items need to be added, tap **Add items**.
9. Select a payment method from the **Payment method** menu. For details on payment methods, see [Payment Methods \(on page 9\)](#).
10. Tap **Take payment**.
11. For manual card entry, follow these steps:

- a. Tap the card icon to the right of the card number field.
- b. Scan the front of the card with your phone camera. The card number and expiration date are added to the payment screen.
If the card number or expiration date is not clearly visible on the card, manually enter the card number and expiration date.
- c. Add the ZIP code for the card.
- d. Tap **Take payment**.

12. For card readers, follow these steps:

- a. Either insert the card, chip first, into the card reader, or to swipe the card, as prompted.
- b. If tipping is enabled, select a tip amount.
- c. Tap **Take payment**.

13. For Tap to Pay, follow these steps:

- a. If tipping is enabled, select a tip amount.
- b. Tap the payment card or the customer's device with your device.
- c. Tap **Take payment**.



Important: Android devices must have a companion app installed to accept Tap to Pay. For instructions on how to install the companion app, see [Enabling Tap to Pay on Android Devices \(on page 15\)](#)

14. Select a receipt method. Options include email, share, print, or no receipt.

15. Tap **Done**.

The payment is accepted.

Accepting Payment for Items in Your Catalog

Before you use this option, add items to your catalog. For details, see [Managing Your Catalog \(on page 16\)](#)

Follow these steps to accept a payment for items in your catalog:

1. Tap **Payment**.


2. **Option 1:** tap **Categories** to add items by category.

a. **Optional:** search for the category that you wish to browse.

b. Tap the category that you wish to browse.

c. Toggle **Show available items only** to limit items by availability.

d. For the item that you wish to add, tap the plus and minus icons to adjust the amount of items.


e. To browse another category, tap  and repeat substeps a-d.

3. **Option 2:** tap **All items**.

a. **Optional:** search for the item.

b. Toggle **Show available items only** to limit items by availability.



c. For the item that you wish to add, tap the plus and minus icons to adjust the amount of items.

d. To browse another category, tap  and repeat substeps a-c.

4. Tap .

The Review order screen appears.

5. Review the order.

a. Tap the  and  buttons to adjust the quantity for each item.

b. To delete the item, lower the quantity to 1 and then tap the red trash can icon.

c. If more items need to be added, tap **Add items**.

6. Select a payment method from the **Payment method** menu. For details on payment methods, see [Payment Methods \(on page 9\)](#).

7. Tap **Take payment**.

8. For manual card entry, follow these steps:

- a. Tap the card icon to the right of the card number field.
- b. Scan the front of the card with your phone camera. The card number and expiration date are added to the payment screen.
If the card number or expiration date is not clearly visible on the card, manually enter the card number and expiration date.
- c. Add the ZIP code for the card.
- d. Tap **Take payment**.

9. For card readers, follow these steps:

- a. When prompted to present the card, insert the card, chip first, into the card reader. Or, if the card supports Tap to Pay, tap the card on top of the card reader.
- b. If tipping is enabled, select a tip amount.
- c. Tap **Take payment**.

10. For Tap to Pay, follow these steps:

- a. Tap the payment card or the customer's device with your device.
- b. If tipping is enabled, select a tip amount.
- c. Tap **Take payment**.



Important: Android devices must have a companion app installed to accept Tap to Pay. For instructions on how to install the companion app, see [Enabling Tap to Pay on Android Devices \(on page 15\)](#)

11. Select a receipt method. Options include email, text, print, or no receipt.

12. Tap **Done**.

The payment is accepted.

Payment Methods

The following payment methods are supported by the Authorize.net 2.0 app:

Tap to Pay

You use your smartphone to accept payments from cards that support Tap to Pay or NFC enabled devices with digital wallets such as Apple Pay or Google Pay.



Important: Android devices must have a companion app installed to accept Tap to Pay. For instructions on how to install the companion app, see [Enabling Tap to Pay on Android Devices \(on page 15\)](#).

Credit/debit card

You use a card reader connected through Bluetooth. This option is the default if you have a card reader connected to the app. For details on adding a card reader, see [Adding a Card Reader \(on page 14\)](#).

Manual card entry

You enter the card number, expiration date, and ZIP code for the cardholder manually. This option is the default if you do not have a card reader connected.

Cash

You enter the amount of cash received, and a balance due appears. Cash transactions are recorded in the app only, and do not appear in the Merchant Interface.

Transactions

Use the Transactions feature to view transactions accepted on the app. You can also void or refund transactions.

Viewing and Managing Transactions

Follow these steps to view and manage your transactions:

1. Tap **Transactions**.

2. **Optional:** enter a transaction ID.

3. **Optional:** tap  to set filters.

Filters include:

- Sort by newest to oldest or oldest to newest
- Transaction method: all, card, or cash
- Date range: today, yesterday, last 7 days, last 15 days, or last 30 days
- Transaction status: all, declined, void, refund, or settled successfully

Tap **Apply filters** to apply the filters you selected, or tap **Clear all** to reset all filters.

4. **Optional:** Set the date range: today, yesterday, last 7 days, last 15 days, or last 30 days.


5. Scroll to find the transaction that you want.


6. Tap the transaction.


The following transaction details appear:

- The date and time of the transaction
- The amount of the transaction
- The transaction's recent activity, with dates and times for each action
- The transaction ID
- The transaction status

- The transaction authorization code
- The transaction type
- The transaction method

7. To email a receipt, tap  , enter an email address, and tap **Submit**.
A receipt is sent to the email address entered.

8. To print a receipt, tap  .
If a printer is connected, the receipt is printed. If a printer is not connected, you are prompted to connect the printer.

9. To share a receipt, tap  .
You are prompted to share the receipt using the options offered by your phone.

10. To void unsettled transactions, tap **Void**.
The transaction is voided and cannot be settled.

11. To refund settled transactions, tap **Refund**.
The transaction is refunded, and the customer receives the funds after settlement.


Settings

Use the Settings feature to complete these tasks:

- Update your user account profile.
- Set up biometrics.
- Set up a Bluetooth card reader.
- Set up default sales tax, tipping, and receipt printers.
- Set up a default landing view for accepting payments.

Updating Your User Profile

Follow these steps to update your user profile:

1. Choose **Settings > My Profile**.
2. Tap **Edit**.
The Edit Profile screen appears.
3. Update the name, address, city, state, ZIP code, phone number, and email address for your user profile. If you leave a field blank, an error message appears.
4. Tap **Save** to save your changes, or tap  to cancel.



Important: Changes that you make to your user profile in the app do not change your user account in the Merchant Interface.

Setting Up Account Security

Follow these steps to set up biometrics:

1. Choose **Settings > Account security**.
2. Toggle the biometrics option.
You are logged out of the app.
3. Log back in to the app using your username and password.
4. When prompted, use the device's biometric option, such as facial recognition or fingerprint.

You can now use biometrics to log in to your app.

Adding a Card Reader

Follow these steps to add a card reader:

1. Power on your card reader.
2. In the app, choose **Settings > Payment acceptance**.
3. Choose **Card reader**.
4. Tap **Continue**.
5. Tap **Connect card reader**.



Important: If you do not have a Bluetooth card reader, tap **Purchase Card Reader**. A web page appears where you can buy a compatible Bluetooth card reader. For more information about available card readers, see <https://partner.posportal.com/authorizenet/auth/authorize-net-bbpos-awc-walker-c3x-bluetooth-card-reader.html>.

6. Tap **Connect**.
7. On the Bluetooth Connection screen, tap your card reader.
8. Tap **Connect**.
9. When prompted, enter the PIN for your card reader. The PIN is printed on the back of the card reader and is labeled as *BT Passkey* in fine print.
10. Tap **Done**.

The card reader is connected to your phone.

You can connect only one card reader at a time. If you connect a new card reader, the previous card reader is disconnected.

Updating the Card Reader Firmware

Follow these steps to update the card reader firmware:

1. Choose **Settings > Payment acceptance**.
2. Choose **Card reader**.
3. To have the app check for updates every time you log in, tap **Check for updates every login**.
4. Tap **Update card reader**.
5. Tap **Update now**.
6. Tap **Update now** if you are ready to update the card reader, or tap **Update later** to postpone the update.
The update process can take up to 15 minutes to complete.
A progress bar appears.
7. If the reader does not require a restart, tap **Done** and wait 5 minutes for the reader to prepare to take transactions. If the card reader requires a restart, tap **Reconnect card reader**.

The card reader is updated.

Enabling Tap to Pay

Enable Tap to Pay for contactless payments through your device.



Important: iOS support for Tap to Pay is coming soon.

Enabling Tap to Pay on Android Devices

Android devices need the Tap to Pay Ready companion app before you can use the Tap to Pay option.

Follow these steps to enable Tap to Pay on Android devices:

1. Choose **Settings > Payment acceptance**.
2. Choose **This Device** and tap **Continue**.
3. Tap **Get It On Google Play**.
4. Install the Tap to Pay Ready app.

5. Return to the Authorize.net app and tap **Continue**.
6. Allow the Authorize.net app to activate your device.
7. When the device is activated, tap **Continue**.
8. Save the assigned serial number in a safe space.
9. Tap **Continue**.

The Android device can accept Tap to Pay through the Authorize.net app.

Managing Your Catalog

Use the Manage Catalog module to configure tax types, sales departments, sales categories, and sales items for your catalog.



Important: You must add tax types, sales departments, and sales categories in that order before you can add sales items.

Managing Catalog Tax Types

Follow these steps to manage tax rates for your catalog:

1. Choose **Settings > Catalog Management**.
2. Tap **Tax types**.
3. To add a new tax type, tap **Add tax type**. Or, to edit a tax type that already exists, tap the tax type.
4. Add or edit the tax type and select a base tax. Required fields are marked with an asterisk (*).
5. **Optional:** add or edit the tax rate name and rate.
6. Confirm that the total tax is correct.
7. Tap **Save tax types**.

The tax type is updated.

Managing Catalog Departments

Follow these steps to manage departments for your catalog:

1. Choose **Settings > Catalog Management**.
2. Tap **Sales departments**.
3. To add a new department, tap **Add department**. Or, to edit a department that already exists, tap the department name.
4. Add or edit the department name and choose a tax type. Required fields are marked with an asterisk (*).
5. Tap **Save department**.

The department is updated.

Adding Catalog Categories

Follow these steps to add a catalog category:

1. Choose **Settings > Catalog Management**.
2. Tap **Sales categories**.
3. Tap **Add items**.
4. Add the category name, and choose a department and tax type. Required fields are marked with an asterisk (*).
5. **Optional:** Upload an image that will appear in the categories list.
Supported file types include JPG, PNG, and BMP. The file size is limited to 5 Mb.
6. Tap **Save category**.

The category is added.

Editing Catalog Categories

Follow these steps to edit your catalog categories:

1. Choose **Settings > Catalog Management**.
2. Tap **Sales categories**.
3. **Optional:** Search for the category by name, or sort the categories by name or department.

4. Scroll to the category that you want to edit.
5. Tap the category name.
6. Edit the category name, and choose a department and tax type. Required fields are marked with an asterisk (*).
7. **Optional:** Upload an image that will appear in the categories list.
Supported file types include JPG, PNG, and BMP. The file size is limited to 5 Mb.
8. Tap **Save category**.

The category is updated.

Adding Catalog Items Manually

You can add catalog items manually. Add items manually if you do not have a large number of items to add, or when you want to add an extra item to your existing catalog.

Before adding items, create the appropriate tax types, sales departments, and sales categories for the items. See [Managing Catalog Tax Types \(on page 16\)](#), [Managing Catalog Departments \(on page 17\)](#), and [Adding Catalog Categories \(on page 17\)](#).

Follow these steps to add an item manually to your catalog:

1. Choose **Settings > Catalog Management**.
2. Tap **Sales items**.
3. Tap **Add items**.
4. Tap **Add an item manually**.
5. Add the item name, your item ID, UPC code, and price. Required fields are marked with an asterisk (*).
6. Choose the category and tax type. Required fields are marked with an asterisk (*).
7. If the item is available for sale, check **Item is available**.
8. **Optional:** Upload an image of the item.
Supported file types include JPG, PNG, and BMP. The file size is limited to 5 Mb.
9. Tap **Save item**.

The item is added.

Adding and Updating Catalog Items in Bulk

You can add and update catalog items in bulk. Add or update items in bulk if you have many items to add or update to your existing catalog.

Before adding items, create the appropriate tax types, sales departments, and sales categories for the items. See [Managing Catalog Tax Types \(on page 16\)](#), [Managing Catalog Departments \(on page 17\)](#), and [Adding Catalog Categories \(on page 17\)](#).

Follow these steps to add items in bulk to your catalog:

1. Choose **Settings > Catalog Management**.
2. Tap **Sales items**.
3. Tap **Add items**.
4. Tap **Build a catalog with CSV**.
5. If you have not downloaded a catalog template before, tap **Download catalog template**.
6. Add or edit items in the catalog template. For a list of template fields, see [Template Fields \(on page 19\)](#).
7. Tap **Select file** and choose the template file that you edited.
8. Tap **Upload CSV**.

The items are added or updated.



Important: If the upload fails, change the Item ID or change the Action from *A* to *U*.

Template Fields

The following fields are used in the catalog items template:

System Generated Id

This value is generated by the system. Do not change or add values to this column.

Item Id

The item ID used by the merchant.

Required. Maximum of 64 characters.

Item Name

The name of the item.

Required. Maximum of 64 characters.

UPC

The Universal Product Code (UPC) for the item.

Optional. Maximum of 64 characters.

Category

The category for the item. The category must already exist in your catalog. For information about adding categories to your catalog, see [Adding Catalog Categories \(on page 17\)](#).

Required. Maximum of 64 characters.

Tax Type

The tax type assigned to the item.

Optional. Maximum of 64 characters.

Available Flag

Setting this field to *TRUE* makes the item available in your catalog. Setting this field to *FALSE* makes the item unavailable in your catalog.

Optional. If used, must be set to either *TRUE* or *FALSE*.

Retail Price

Price of the item.

Optional. Number with up to two decimal points. Do not use currency symbols.

Image

The filename of the image of the item. Save the images to the same folder on your device where your template was downloaded.

Optional. Supports .jpg and .png file extensions.

Action

Set to *A* if the item is to be added to your catalog. Set to *U* if the item is being updated.

Optional. Use only *A* or *U*.

Setting a Default Sales Tax

Follow these steps to set a default sales tax:

1. Choose **Settings > Transaction settings**.
2. Enter the percentage of sales tax in the **Default sales tax** field.

The default sales tax is set.



Important: The default sales tax applies only to Quick Pay. Items in your catalog are taxed according to the tax type set up in the catalog. For more details, see [Managing Catalog Tax Types \(on page 16\)](#).

Allowing Tips

Follow these steps to allow tips and to specify default tip percentages:

1. Choose **Settings > Transaction settings**.
2. Toggle **Allow tipping**.
3. Enter amounts in the **Default tipping percentages** fields.

Tips are now enabled during checkout.


Adding a Bluetooth Receipt Printer

You can connect a receipt printer to the app.

To purchase a supported receipt printer, visit <https://partner.posportal.com/authorizenet/auth/printers.html>.

Follow these steps to add a receipt printer:

1. Follow your printer's instructions on how to connect the printer to your device through Bluetooth.
2. Choose **Settings > Receipt printer**.
3. Tap **Bluetooth connection**.

4. If the printer does not appear, make sure Bluetooth is turned on, and tap **Troubleshoot BT connection**.
5. Tap  .
6. To automatically print receipts after checkout, toggle **Auto Print receipts**.

The printer is now connected to your phone.

You can connect only one receipt printer at a time. If you connect a new printer, the previous printer is disconnected.

Setting the Payments Default Landing View

You can set the default landing view so that when taking payments you can either default to Quick Pay, Categories, or All Items. Follow these steps to set the default landing view:

1. Choose **Settings > Set default landing view**.
2. Select your preferred landing view: Quick Pay, Categories, or All Items.

The selected landing view appears when you click **Payment**.