

FAQ

MX™ Retail Frequently Asked Questions

WHY CAN'T I SEE THE APP ON MY PHONE?

The Retail app is for iPads only. It can be downloaded on any iPad by going to the App store and searching for MX Retail. When you locate it tap on the Get button then on the Install button that appears in the same place. The app will download on your device home screen for you to access at any time.

HOW DO I CREATE AN ORDER?

To create an order click on Orders in the left hand menu. Here is where you will find a list of all orders regardless of their status. In the upper right click on the green +Add Order button. You will notice this looks a lot like an invoice, simply fill out the required information, add your items (quick add or from inventory) and click the Save button to create a draft or the Place Order button to collect payment, send receipts, and/or fulfill items.

WHAT IS THE DIFFERENCE BETWEEN AN ORDER AND AN INVOICE?

The main difference between an order and an invoice is who initiates the request. For an order the customer is usually initiating the request for goods and services, they make their payments up front and await the goods/services to be delivered. An invoice on the other hand is initiated by the merchant/seller, the goods/services have already been delivered and the merchant/seller is still awaiting payment from the customer/buyer.

WHAT IS THE DIFFERENCE BETWEEN A TAG AND A COLLECTION?

Tags and collections are very similar in the fact that they are used to organize your products/inventory. There is however one main difference, a product can only be assigned to one collection whereas it can have many tags. Often we see collections used to represent the sections or departments within a shop. Tags are typically used for more general references to indicate products for specific genders, brands, and/or sale indicators. These are just examples of ways to use tags and collections, each business is unique and may find different ways to categorize/organize their products using collections and tags that best fits their needs.

WHAT IS A VARIANT?

A variant is any options or choices available to a customer when purchasing a specific product. For example if I need a #2 pencil I don't really have any options when it comes to my purchase so that would be a single variant. However, when I purchase a shirt I am able to choose between different colors and sizes which would be considered a multi (or multiple) variant.

DO I HAVE TO EMAIL AN ORDER?

Orders have different source types available, they are POS, web, and telephone. The source type selected will determine the flexibility available. If you choose the POS (point of sale) source type, all customer information is optional. However, web and telephone do require customer name and email address.

HOW DO I REFUND AN ITEM ON AN ORDER? CAN I DO A PARTIAL REFUND?

There are a couple ways to add a return on an order depending on what best fits your situation at hand. If you would like to mark an item as returned and return the funds for that item back to the customer at the same time you can do so by clicking on the More button found in the upper right when viewing an existing order. Under the More button select Add Return, a pop up will appear for you to select the item being returned and the tender type to return the funds to the customer. If it is a card a return will automatically be generated for the card (no need to swipe again).

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If you don't want to return an item and just want to return an amount simply scroll to the bottom of the order view and click on the payment reference number found in blue. You will now see a pop up, in the bottom right of the pop up will be an icon to void or return (depending on the status of the payment). Clicking void will void the entire payment, and return will allow you to enter the amount (less than the original payment) that you would like to give back to the customer.

MX™ Retail iOS Frequently Asked Questions

WHY CAN'T I LOG INTO THE RETAIL APP ON MY iPad ONCE I DOWNLOADED IT?

If you are experiencing some trouble logging into the Retail app on your iPad it may be because you have not installed it on www.mxmerchant.com under the app store. If you already have the retail app installed on your account and are still experiencing difficulty please contact customer support at 800-935-5961.

CAN I VOID A PAYMENT?

To void a payment within the Retail app on your iPad simply click on Orders found on the bottom navigation. Locate the order that you would like to return or void. Once you have clicked on the order you will see the cart to the right, swipe from right to left on the cart view to access the other screens available. When you reach the return view, select the products you would like to return and click the green return button at the bottom.

IS THERE AN EMV & NFC SOLUTION?

We do have an EMV solution available on our MX Retail iOS app found within the Apple App store and available on iPads. When this app is installed you can use the Walker C2X which connects via the headphone jack on your device. This card reader accepts swipe, EMV, and NFC transactions.

WHEN WILL MY CASH DRAWER OPEN?

In order to open your cash drawer you must have the Epson TM-T88V connected to your iPad and within the settings of the MX Retail app and hard wired to the cash drawer. This is because the printer is what talks to the cash drawer to tell it when to open. Now whenever you have a cash or check transaction the cash drawer will automatically pop for you!

WHAT HAPPENS WHEN I TURN OFF COLLECTIONS?

Turning collections on and off won't affect your products. Turning collections off simply changes the view of your product screen so all products are grouped together. When you have collections turned on and products assigned within those collections they are separated on the product screen to help organize and easily locate the products.

HOW DO I MANUALLY ADD AN ITEM TO THE CART THAT IS NOT IN INVENTORY?

If you don't have a product in inventory and need to quickly add an item to the cart for the customer you can do so using the keypad option found on the bottom navigation within the app. Clicking on this will show you a calculator like view, simply enter the total dollar amount for the item and click the add to cart button.

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To take it a step farther, if you want to clearly identify what the customer purchased rather than just showing keypad on their receipt simply click on the keypad line item within the cart. A pop up will appear where you can change the name and qty if you would like then click save. Now it will appear just like a regular item on the customer's receipt.

HOW DO I DELETE AN ITEM FROM THE CART ONCE IT HAS BEEN ADDED?

Once an item has been added to the cart and you would like to remove it you can do so by swiping your finger on the screen across the name of the item from right to left. You will see a red delete button will appear to the right.

If you would like to delete everything in the cart you can do so by clicking the text that reads "Clear Cart" found at the bottom just above the checkout total.

CAN I USE A CUSTOMER'S ACCOUNT VAULT?

As long as a customer is added to the cart prior to checkout and they have cards available in their account vault you will see their cards as an option on the checkout screen. To add a customer to a cart simply click on the customer tab on the bottom navigation, locate the customer, and click Add to cart found in the upper right of the customer view.

WHAT PERIPHERALS ARE COMPATIBLE?

Cash Drawer - Heckler Windfall

Barcode Scanner - Socket Mobile 7Ci

Card Reader - Walker C2X and ID Tech iMag II Pro

Printer - Epson TM-T88V

CAN I USE AIRPRINT?

You can! As long as the printer is paired with your iPad (wifi or bluetooth), whenever you click print within the app it will ask you which of the paired printers you would like to use.

WHICH IPADS ARE COMPATIBLE WITH THE HECKLER STAND?

The Heckler Windfall Stand only supports iPad Air, Air 2 & 5th generation devices.