

# Infusionsoft Mobile Payments Android

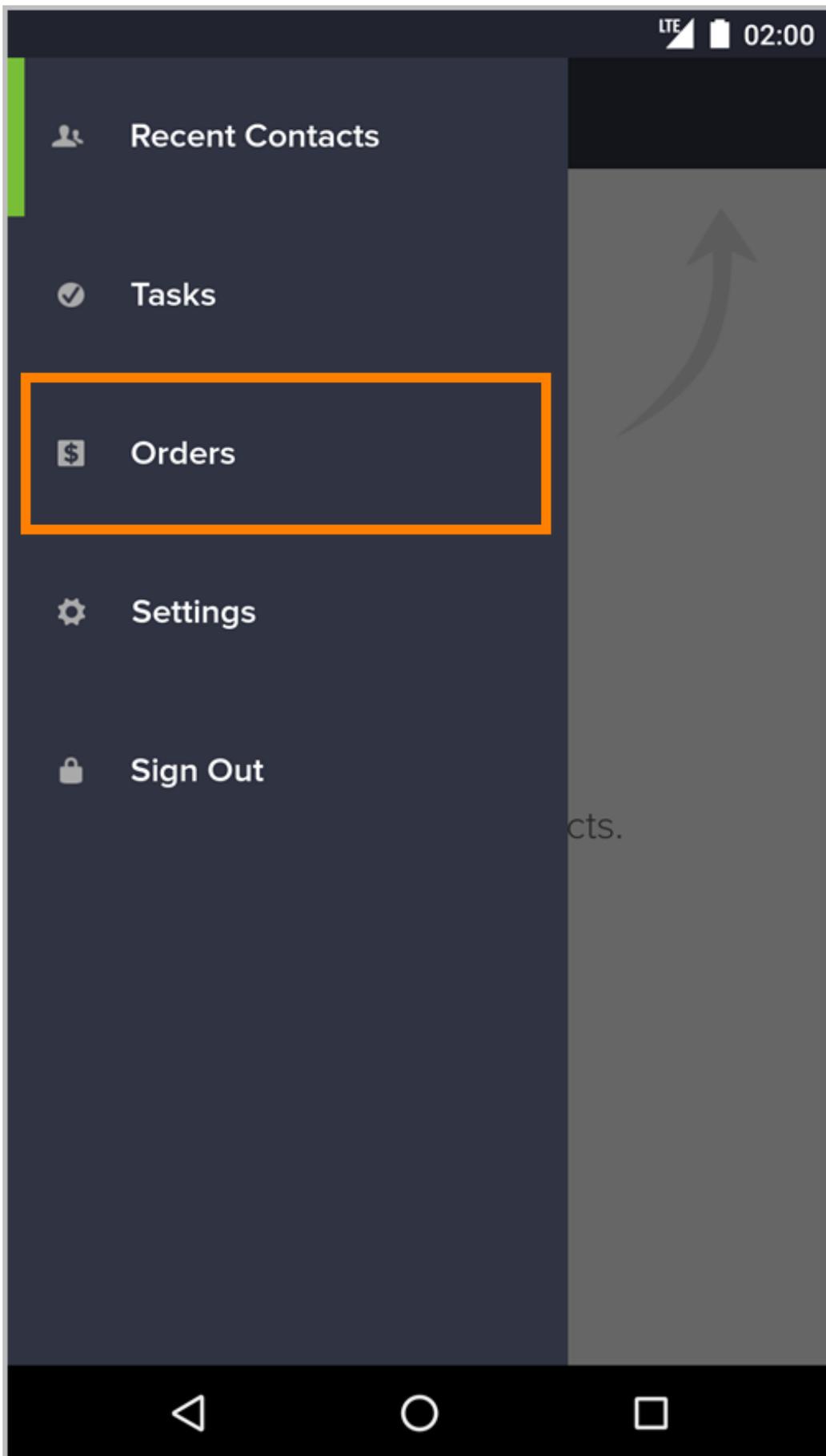
An Active **US Infusionsoft Payments** account is required to use the Infusionsoft Mobile Payments feature.

For information on connecting your Infusionsoft Payments Mobile Card Reader, please see [This Article](#) .

**Known Issue:** If you attempt to process a payment for a contact with no email in its Email 1 field through the Recent Orders Screen, the contact may not receive a receipt email when the payment is processed. This is true even if the contact has data in its Email 2 or Email 3 fields. **Workaround:** Always complete a contact's Email 1 field before processing payments.

**Problems with your credit card reader?** If you experience a problem with your Infusionsoft Mobile credit card reader, please first contact Infusionsoft support . If a hardware issue is identified, Infusionsoft support will provide instructions for returning and claiming a replacement from the manufacturer.

1. Expand the menu and tap **Orders**



2. Tap on an order to view the order details and payment status

## Today

Christina Kehoe

#760

\$147.49

PAID

## Fri, Feb 19

Christopher J Wagner Jr

#758

\$25.61

UNPAID

Chris Wagner

#756

\$699.00

PAID

## Thu, Feb 18

Bob Thorton

#754

\$100.00

UNPAID

Janine Furmore

#752

\$599.00

UNPAID

Christine Walker

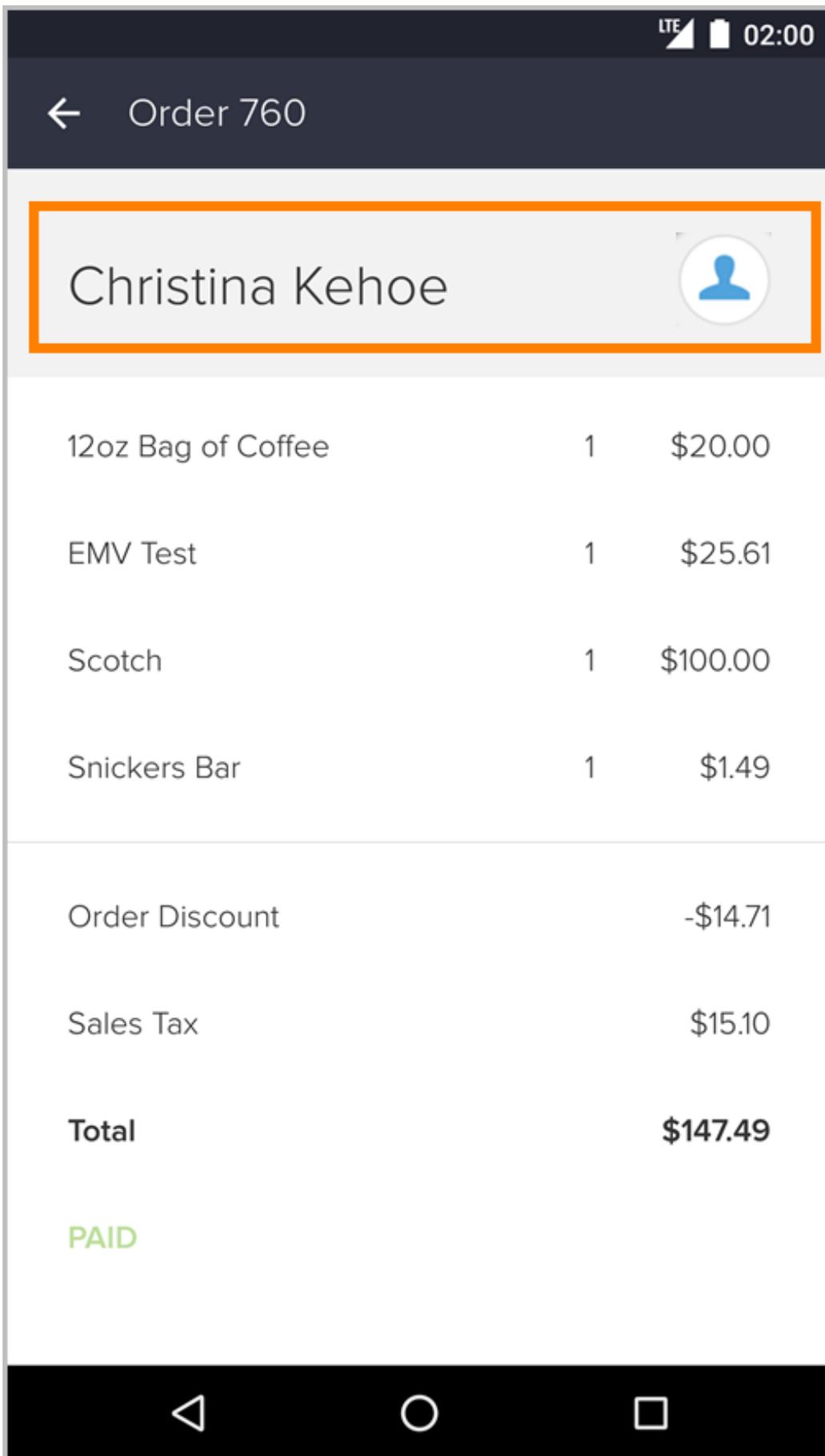
#750

\$85.00

UNPAID



3. Tap on the person icon to open the contact record attached to the order. Tapping an item on this screen will expand the description.



4. To create an order, tap + in the Order List view.



## Today

Christina Kehoe  
#760**\$147.49**  
PAID

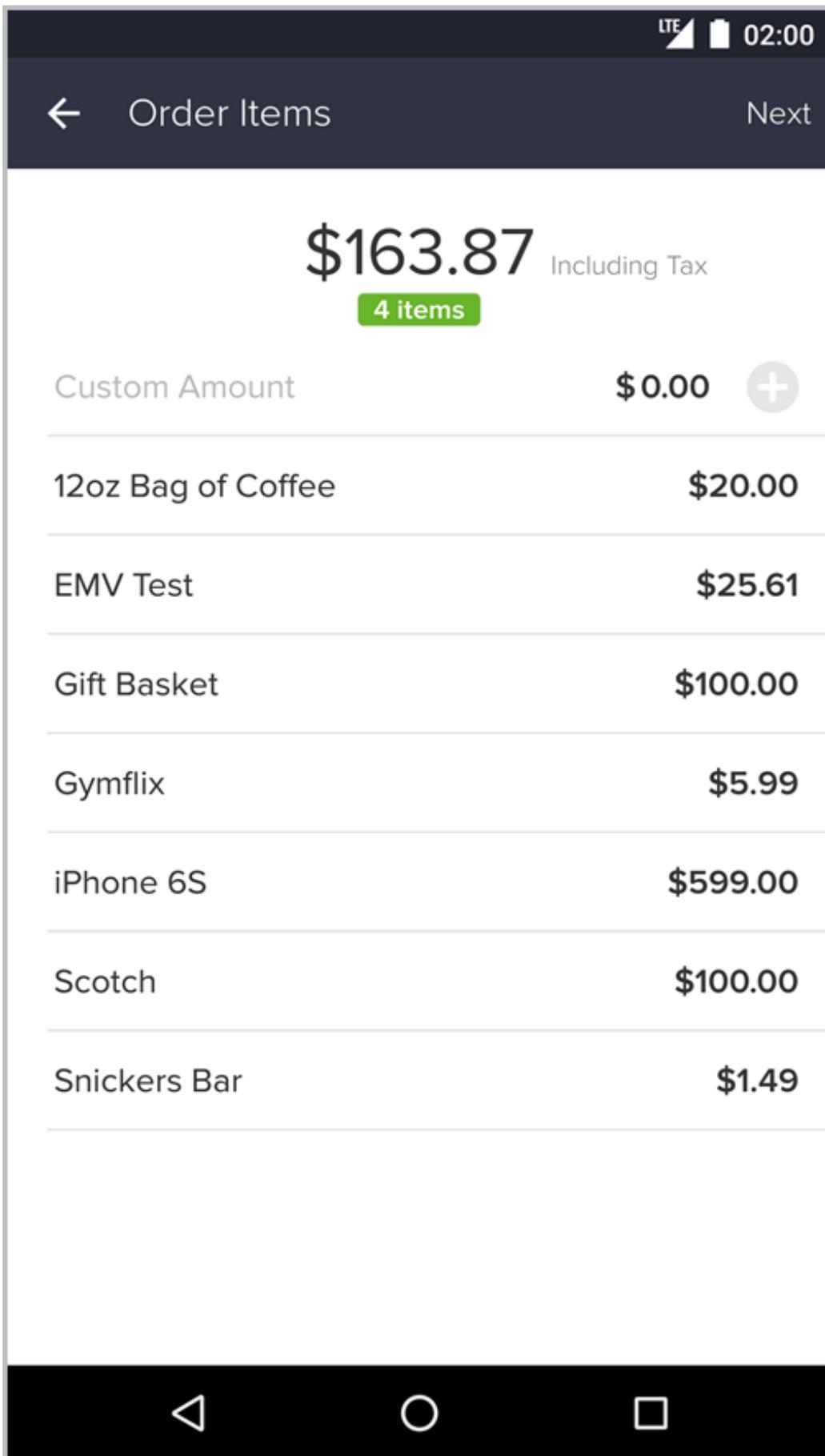
## Fri, Feb 19

Christopher J Wagner Jr  
#758**\$25.61**  
UNPAIDChris Wagner  
#756**\$699.00**  
PAID

## Thu, Feb 18

Bob Thorton  
#754**\$100.00**  
UNPAIDJanine Furmore  
#752**\$599.00**  
UNPAIDChristine Walker  
#750**\$85.00**  
UNPAID

5. From your product list, tap the items you would like to add to the order. Items will be automatically added to the cart and the total will be calculated at the top. You can add a custom product and amount by tapping the plus button at the top.



6. When you select an item with product options, fill in the required options (such as

subscription plan or size) then tap the check mark to add it to your cart.

The screenshot shows a mobile application interface for selecting product options. At the top, there is a dark header with a back arrow and the text 'Product Options'. In the top right corner, there is a status bar showing 'LTE', a battery icon, and the time '02:00'. Below the header, the product name 'Scotch' is displayed on the left and the price '\$100.00' on the right. A paragraph of text describes Scotch whisky. Below this, there is a section titled 'Subscription Plans (Optional)' containing three radio button options: 'No Subscription.' (selected), '\$85.00 per week until canceled.', and '\$95.00 per month until canceled.'. At the bottom, there is a 'Taxes' section with three rows: 'AZ' at 2.2%, 'Chandler' at 3.7%, and 'VAT' at 5.5%, each with a green toggle switch turned on. The bottom of the screen shows the standard Android navigation bar with back, home, and recent apps icons.

Product Options

Scotch \$100.00

Scotch whisky, often simply called Scotch, is malt whisky or grain whisky made in Scotland. Scotch whisky must be made in a manner specified by law. All Scotch whisky was originally made from malted barley. Scotch whisky, often simply called Scotch.

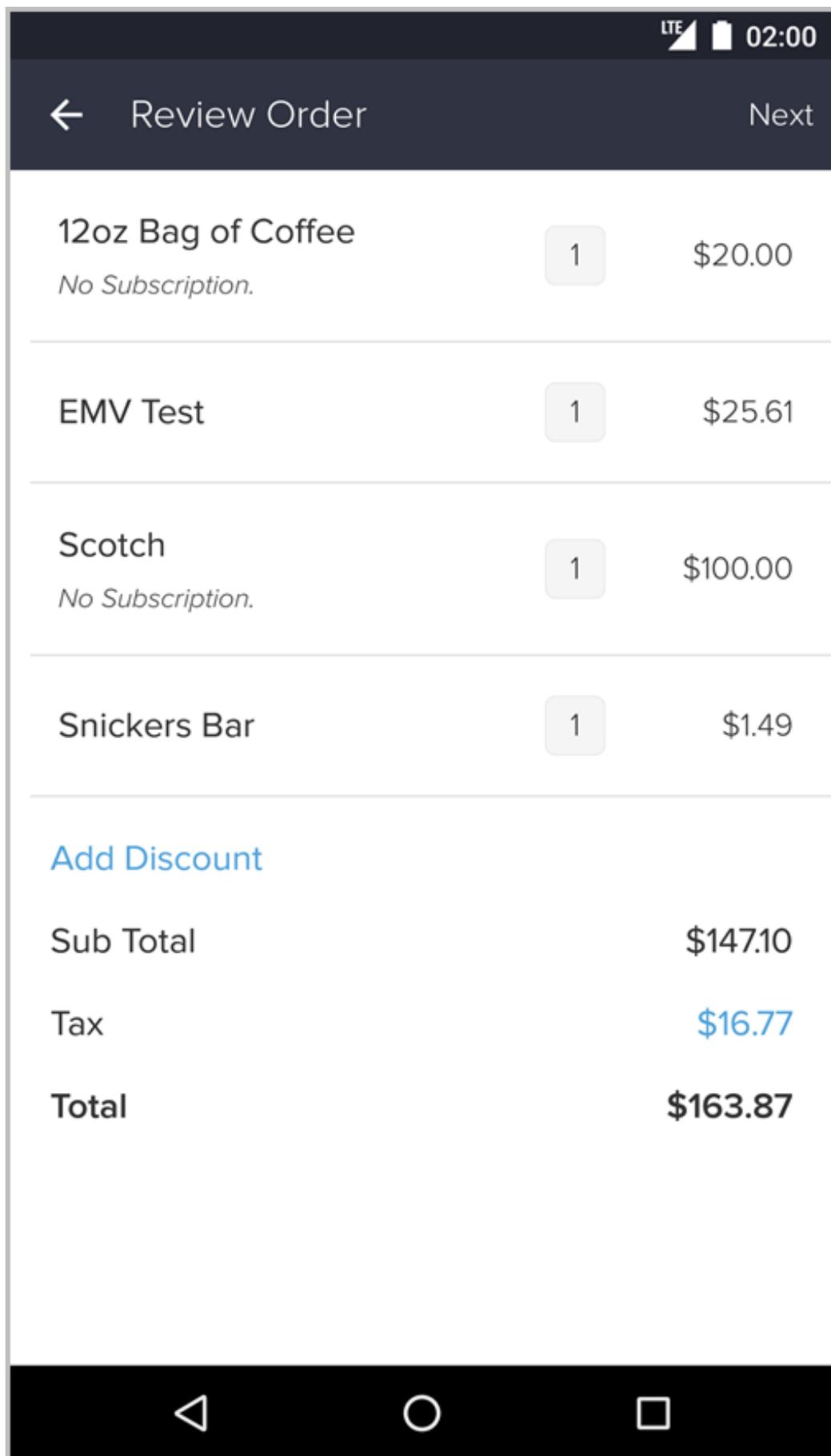
Subscription Plans (Optional)

- No Subscription.
- \$85.00 per week until canceled.
- \$95.00 per month until canceled.

Taxes

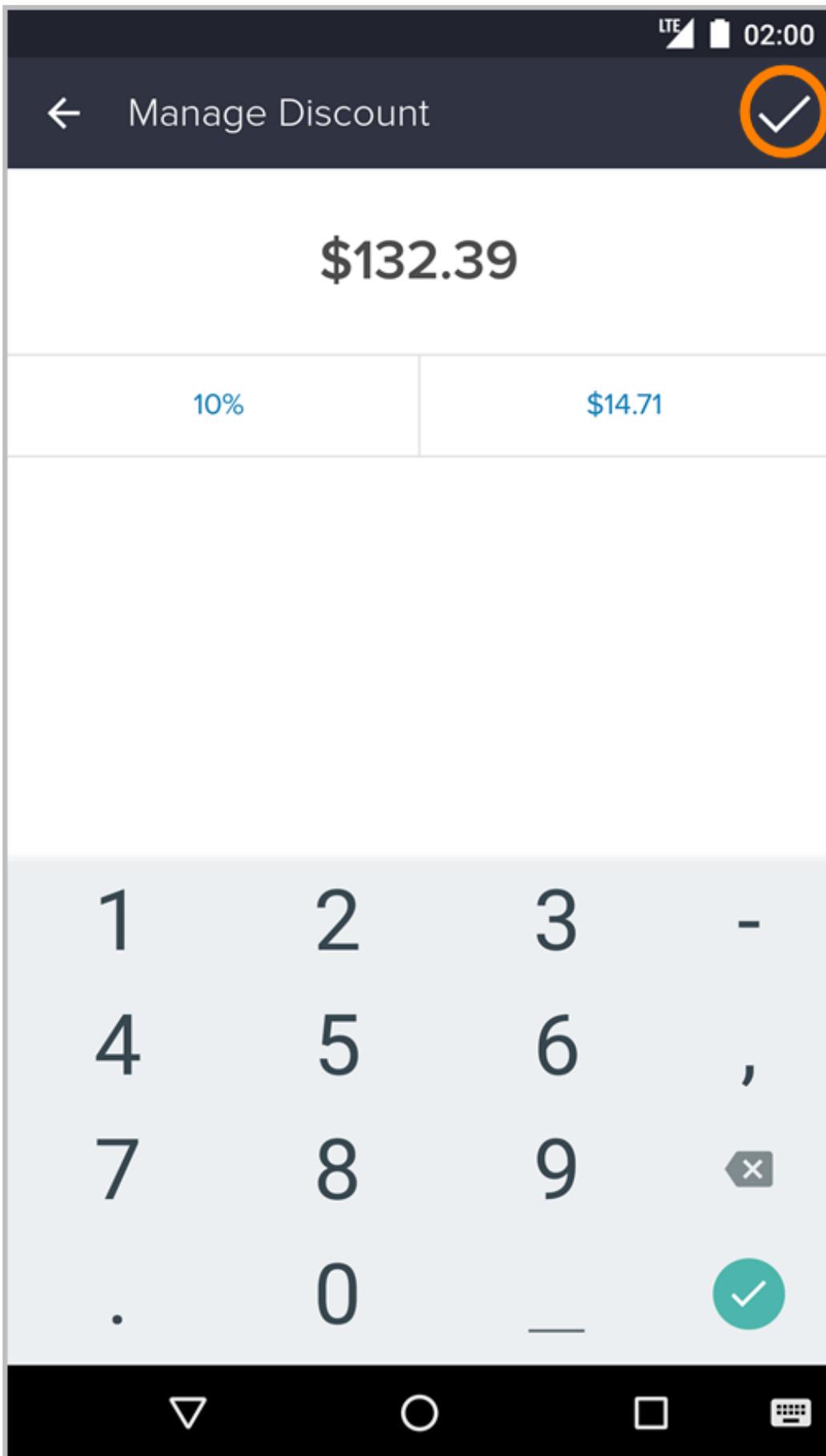
AZ	2.2%	<input checked="" type="checkbox"/>
Chandler	3.7%	<input checked="" type="checkbox"/>
VAT	5.5%	<input checked="" type="checkbox"/>

7. On the review order screen, you can view the order items, details and total.
  - You can tap the quantity field to change the quantity of a particular item.
  - You can long press an item to delete it from the order.
  - You can tap an Item to view and change its Product Options (if it has options.)
  - You can tap **Add Discount** to enter in a discount for the order.
  - You can tap the Tax field to create and add a tax percentage to the order.
  - Tap the **Next** button to start the payment process.

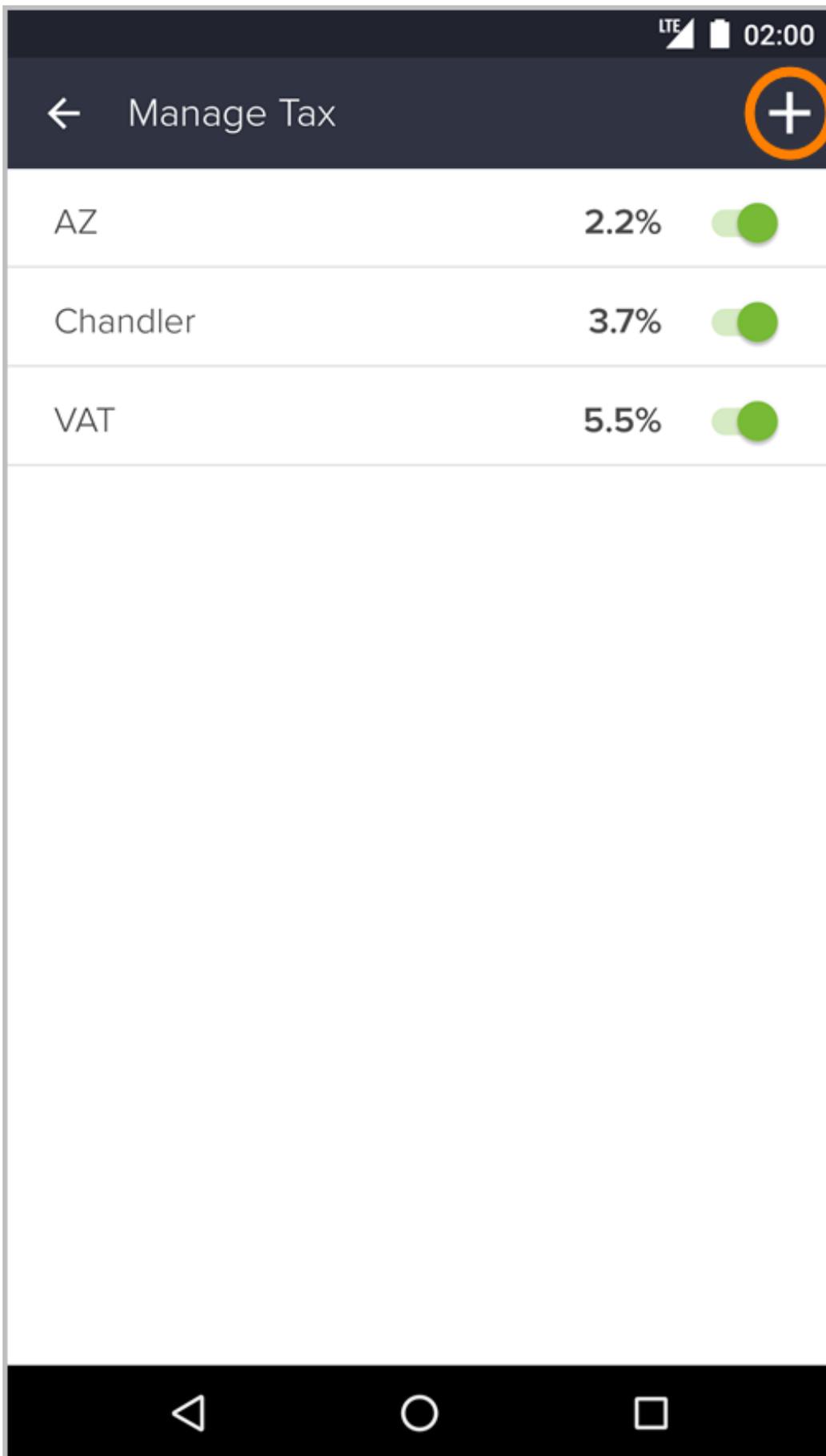


8. To add a discount to your order, fill in either a percentage or dollar amount and

click the check mark.



9. To add tax to your order, toggle a previously set tax by tapping the switch. To add a new tax, tap the + button in the upper right corner. Tap the check mark to add it to your order.

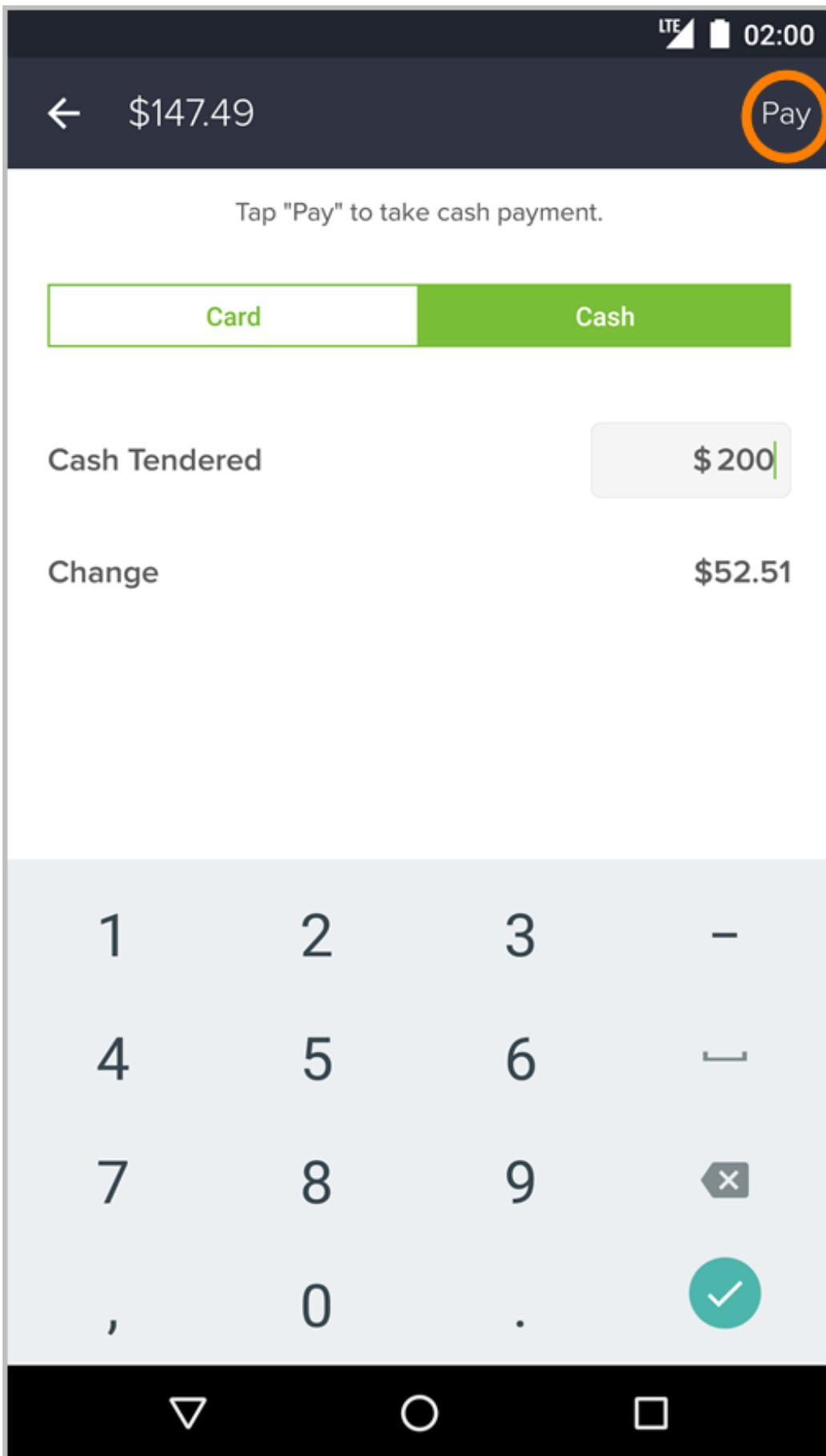


10. After reviewing your order, tap a payment method to begin either the Card or Cash

process.



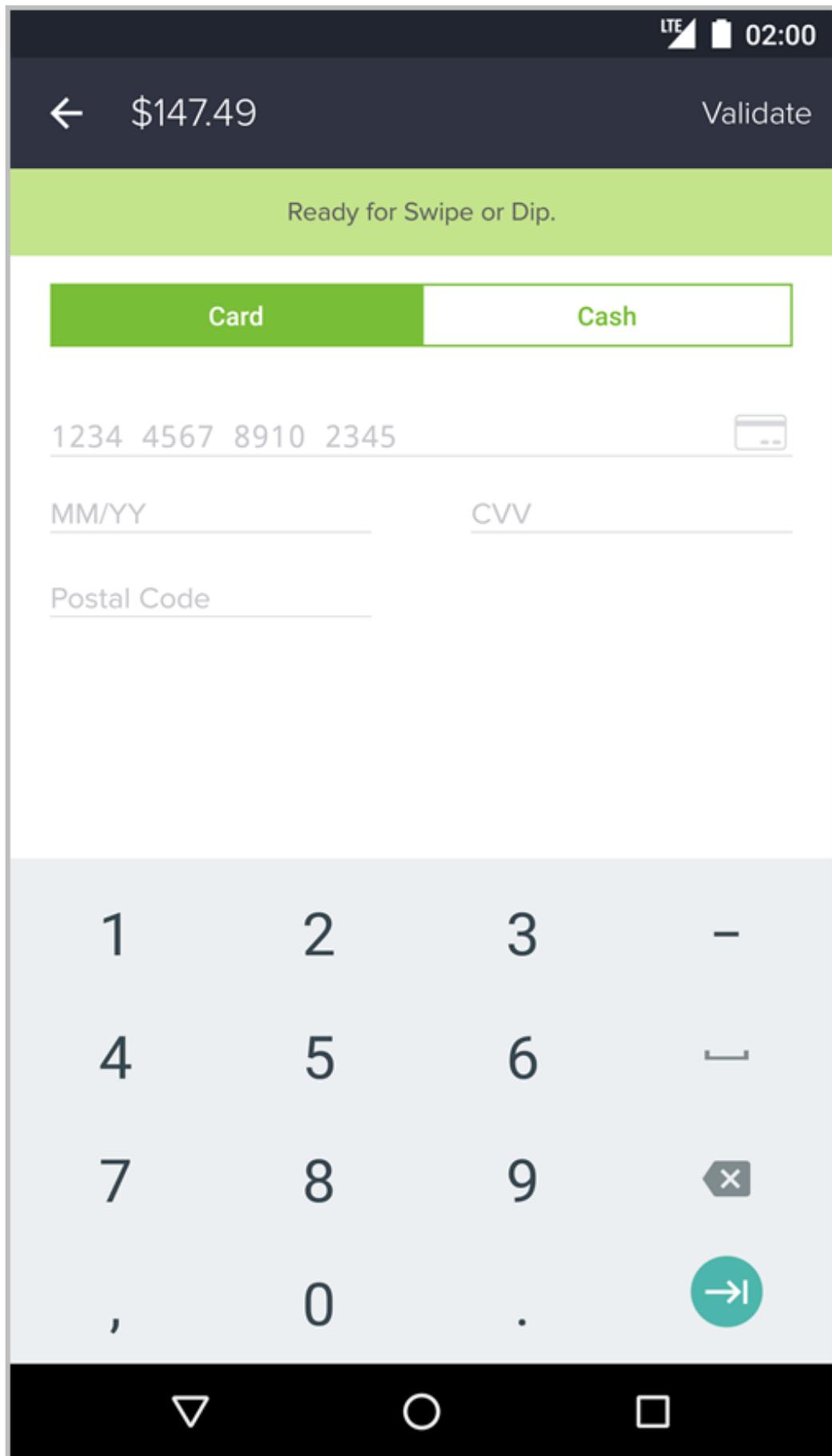
11. If the customer is paying with Cash, enter the amount tendered to automatically calculate the amount of change to be given. Tap **Pay** to advance to the "Assign Contact" screen.



12. If the customer is paying with a credit card, you can choose to manually enter the

card information into the required fields, or you can insert an Infusionsoft Payments card reader and insert the card when the screen indicates it is ready.

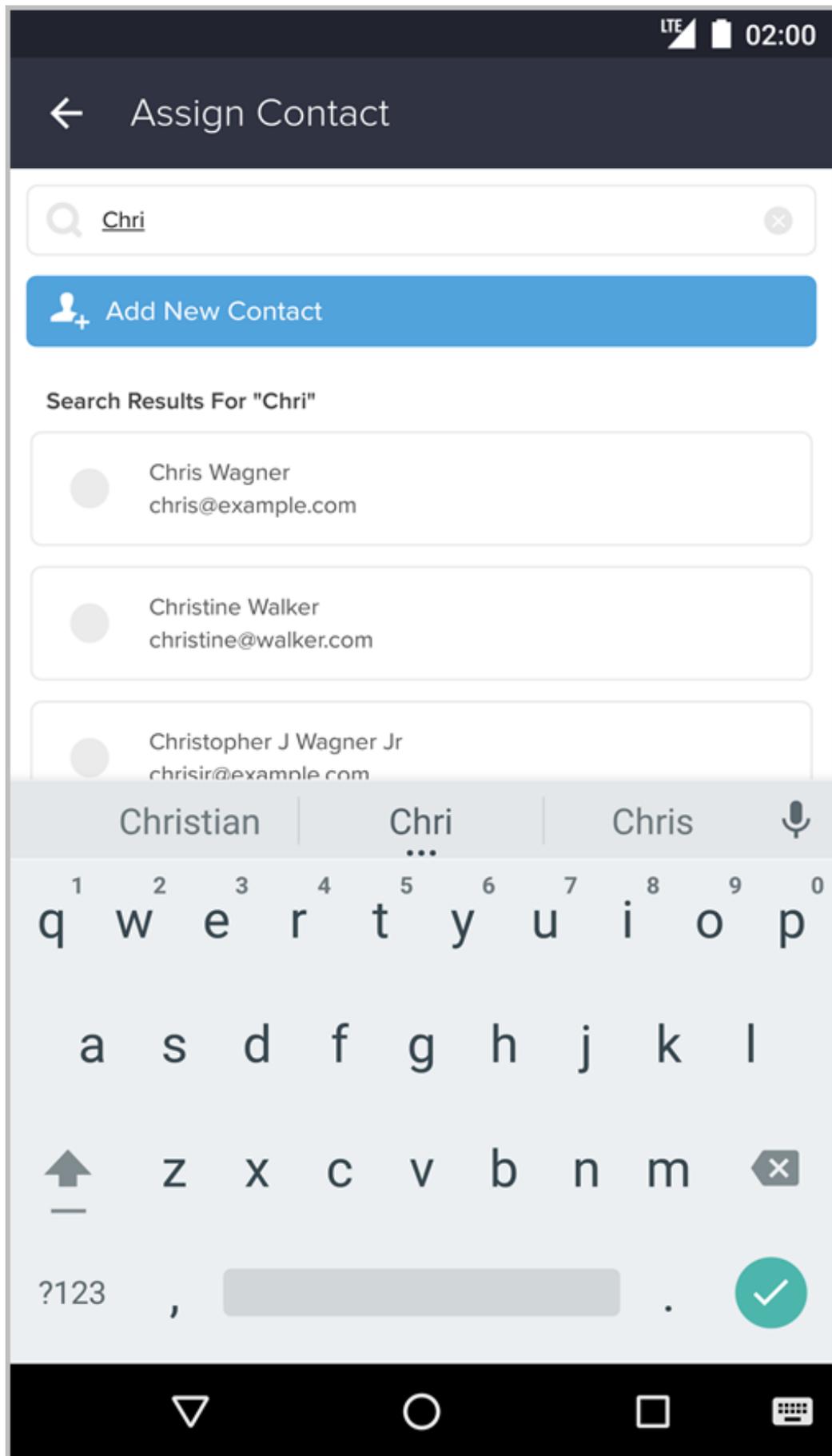
- When you see the “Ready for Swipe or Dip” screen, you can insert a card for payment.
- If an error occurs, you may need to reinsert, check your network connection, or use a different card.
- Wait for the card to tokenize. It will automatically advance to the Assign Contact screen once approved.



13. If the customer is already a contact, their name will appear under "Existing

Contacts" on this screen.

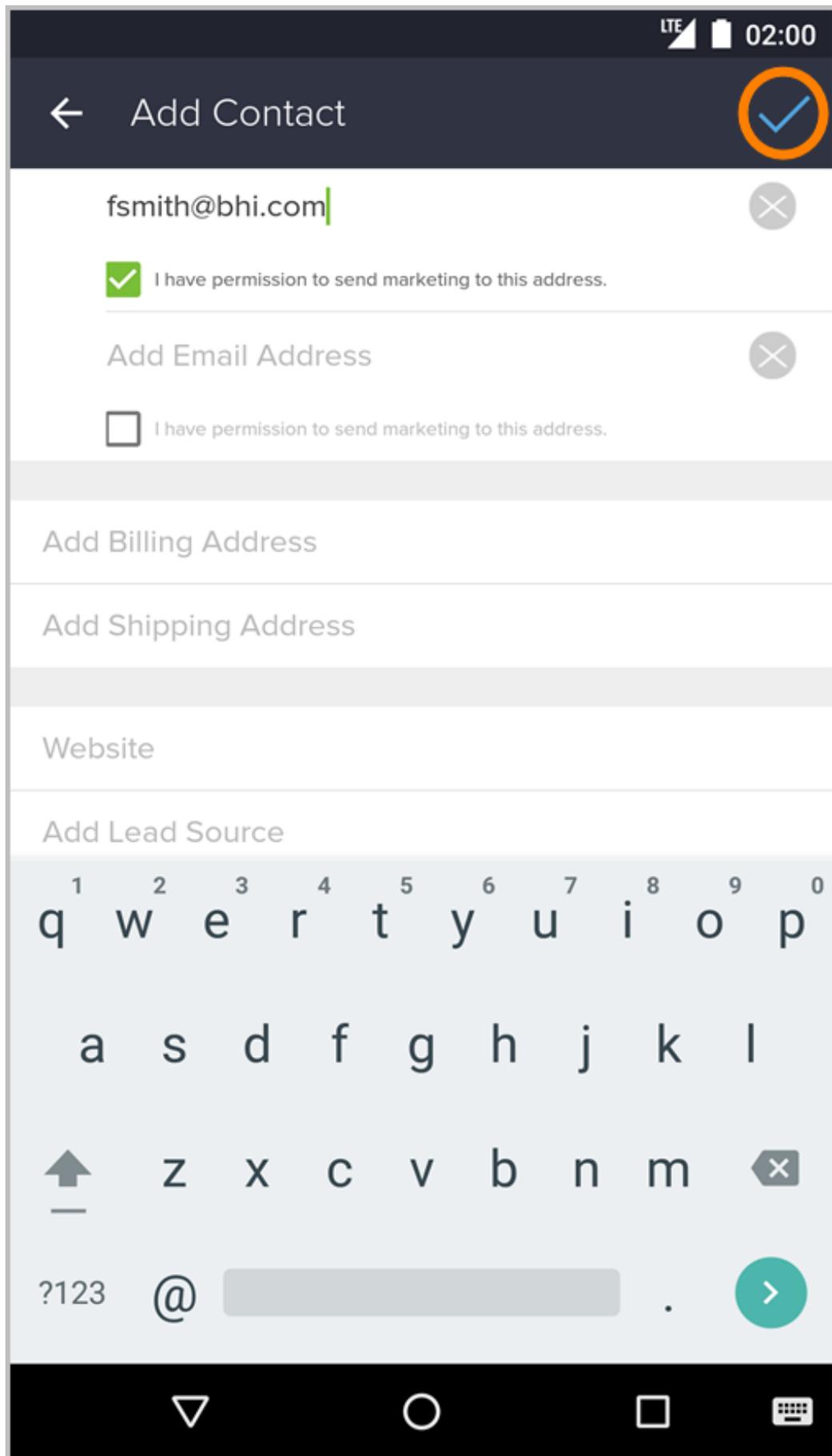
- You can add a new contact by tapping **Add New Contact**.
- You can tap Search Contacts to quickly find an existing contact.
- The contact being assigned must have an email address. You will be prompted to add an email to an existing contact if it does not already have one.



14. The customer's first and last name will be auto-populated if a credit card was used

to pay. You can add additional information as needed.

- Email is required for the receipt to be sent.
- Ensure you have permission to send to this contact by checking the box below the Email field.
- Tap the check mark to automatically advance to the Order Details Screen.



15. To accept the order details, swipe up to process.

Cancel



You are about to create an order for

**Frank Smith**

fsmith@bhi.com

for the amount of

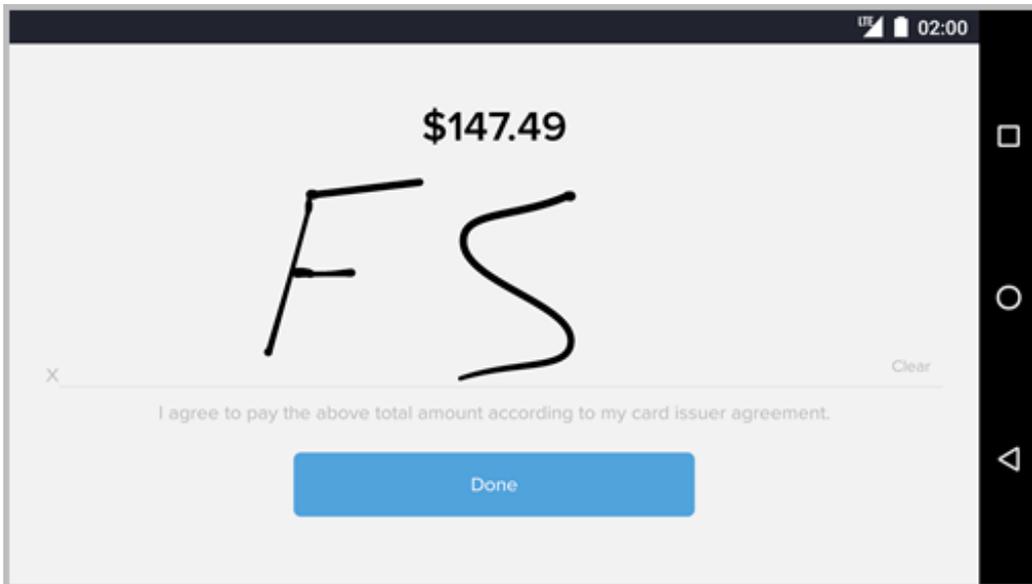
**\$147.49**



Swipe Up to Process Order



16. Hand the mobile device over to customer at this screen. If the customer paid via credit card, they can sign for the order and tap **Done** when the payment has completed processing.



17. Your customer will now view a success message and click OK.

