The Flipcause LIVE app allows you to use your mobile device to process payments and email an automated tax receipts and thank yous to your supporters, along with recording those transaction and contacts recorded into your Flipcause database.

Please note that at this time the Flipcause LIVE app does not connect to any existing Online Store items or into any inventory system. However, you may still take payments for such items and use the following process as a workaround.

**Before You Start**

**Configure Your Settings**

You'll want to make sure your payments have the right settings -

1. that they come through at the correct tax-deductible amount,
2. that they have the correct sales tax,
3. that they get applied to the correct campaign,
4. that you know what merchandise the payments are for,
5. that the automated tax receipt and thank you that your donor receives looks the way you want it to,
6. that you collect the supporter's information.

To do this, we'll want to set up at least one payment profile, or potentially a separate payment profile for each item of merchandise. Go to Payment Profiles and create a payment profile titled as the name of the merchandise item(s) you plan to take payment for, with the following settings:

- Select the **campaign association** you would like this payment to go toward
- In the **Item Value** field, enter the **fair market value** in dollars for the amount of that purchase which will not be tax-deductible. *The tax-deductible amount will be calculated as the payment amount minus the item Market value.*
- In the **Sales Tax Amount** field, enter the percentage of sales tax, if any, to be charged for this item.
Optional but recommended: configure your receipt custom thank you message in this profile.

*Please note that tying a campaign to this payment profile does not transfer over any existing donation levels or settings from that campaign, nor does it transfer over any existing receipt custom messages from that campaign.*

Set **Information Collection** to required. This will ensure that you collect the email, first name and last name of your supporter.

When you set up a Payment Profile you plan to use most often, you should set it as the default payment profile in your app for easy use.

Repeat these steps for any additional merchandise types you'd like to set up. You will want to set these up on each device you plan to use.

**Optional: Configure Your Hardware**

You don't need a card reader to process donations. But if you do plan to use the card reader, you'll want to make sure

1. *it's fully charged* and
2. *is correctly connected.*
3. If your device does not have a headphone jack, please be sure to get an Apple-certified adaptor.

**Charging for Merchandise**

**Payment Amount & Info**

Click **Add a Payment** button.

In the Payment Amount field, enter the price of the merchandise which you'd like to
charge (keep payment frequency on "one-time").

Make sure the right payment profile is selected under Select Payment Profile. You can also change the payment profile from here, or make adjustments to it by clicking view, making changes, and tapping Apply These Settings. (If you change the settings, you'll have to re-enter the donation amount).

In order to know what this payment is for later on, make sure to make any additional notes on this donation, and type these into the Add Internal Note field.

Click Charge $__ button to proceed.

Payment Info

Choose whether they are paying in cash, check or credit card.

If they are paying with a credit card and you intend to use the reader, click Card - Use Reader and check to make sure the black bar at the top confirms that "Card Reader is Connected". You may swipe or insert the card, and we recommend inserting the chip when available for the most secure processing.

You may also enter the card number manually by clicking "Card - Enter Manually". (Note: payments entered manually are NOT included in the Guaranteed Effective Rate. Read here for full details on Mobile App Processing Fees.)

After the card is authorized, the page asking for the signature will show up. At this point, flip the device to face the donor and let them know that the fee coverage option is pre-checked, and they can uncheck it if they do not want to cover the processing fee. Ask for their signature.

Buyer Info

After the payment has processed, supporters will enter their email address and name on this page, once their information is entered, click Send Receipt. Entering their information will send them an automated tax receipt and thank you. (If your supporter
skips this step, their email, first name and last name will be blank in your reports)

Press **Back to Homepage** to be taken back to the home screen, where you can start a new payment.

If they are paying in cash, you can enter the amount of cash you are receiving (if more than the item amount) by clicking Custom and entering the cash amount received, and clicking Tender to calculate the change needed.

If they are paying with a check, you can enter the amount of the check along with the check number then click **Finish**.