



Welcome to USBSwiper! For your FREE upgrade, please follow these step-by-step instructions. Please note, all clickable links are underlined and highlighted in blue.

**STEP ONE:** Backup Invoices and Inventory

Click here to watch a video on how to export your Invoices and Inventory to an Excel Spreadsheet:

<http://www.usbswiper.com/VideoDemo/exporting-importing-data/>

Note: Backing up your Invoices is not required as all credit card sales and refund transactions are permanently located in your Merchant Account History; however, backing up your Inventory is recommended because it will allow you to seamlessly upload them into USBSwiper 3.5.

**STEP TWO:** Reset the Serial Number Activation

Click here to clear out the activation(s) associated with your Serial Number:

<http://www.usbswiper.com/software-activation-reset/>

Note: The Serial Number can be found a previously installed version of USBSwiper. Copy/paste your serial number into Word or NotePad then Save the file as you will need it later.

**STEP THREE:** Uninstall any previous version(s) of USBSwiper

Windows Users:

1. Start Menu > Control Panel > Uninstall a Program. Select USBSwiper and Click Uninstall.
2. Start Menu > Computer > C: drive > Windows > regedit (short for Registry Editor).
3. From the Registry Editor > HKEY\_CURRENT\_USER > Software > FileMaker > Right-click on USBSwiper (3.3, 3.4, or 3.5) and Delete.

Mac Users:

1. Finder > Applications > Right-click on USBSwiper and Move to Trash.

**STEP FOUR:** Download and Install USBSwiper

Click here to begin your download for Windows or Mac Users.

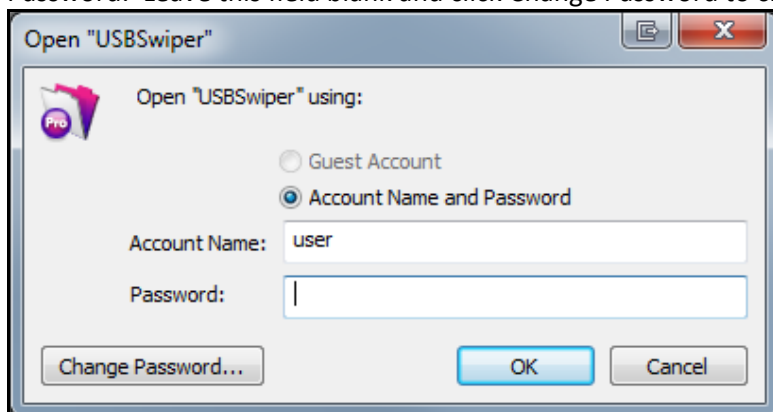
[www.usbswiper.com/download](http://www.usbswiper.com/download)

**STEP FIVE:** Logging In & Creating a Password

When you first open the software, you need to enter the following information:

Account Name\*: User (If your computer name is displayed, change it to User.)

Password: Leave this field blank and click Change Password to create one of your own.

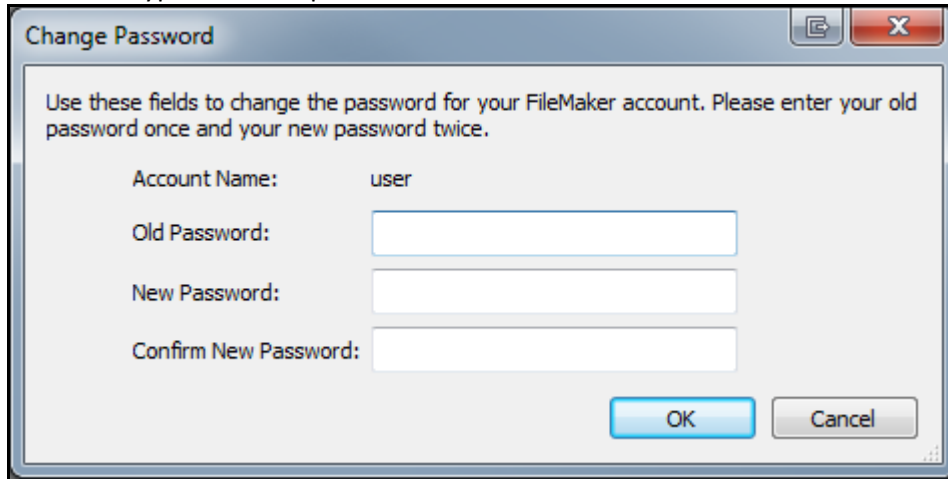




\*Note: Your Account Name will always be User.

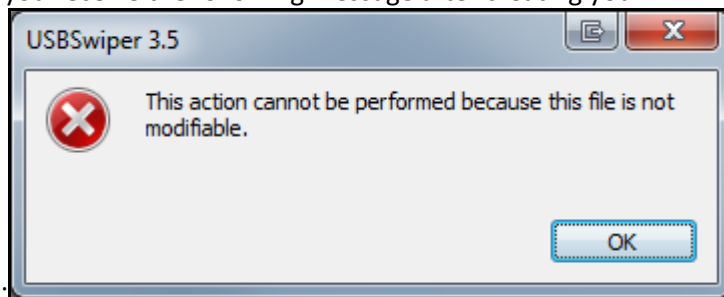
To Create a Password:

1. Leave the Old Password field blank.
2. Type a password of your choice in the New Password field.
3. Retype the same password in the Confirm New Password field and click OK.



\*Note: If you receive the following message after creating your

password:



Follow these steps to change the User Permissions:

1. Click OK to close the message window and Close USB Swiper.
2. Go to Start Menu > Computer > C: Drive > Program Files (or Program Files (x86) for 64-bit users) > right-click on the USB Swiper Folder and go to Properties.
3. Select the Security Tab and click the Edit Button on the right side.
4. Select Users from the box labeled Group or user names (on top). Once selected, Users will be highlighted in blue.
5. Select Allow next to Modify in the box labeled Permissions for Users (down below) and click Apply then OK.
6. Open USB Swiper and repeat STEP FIVE.

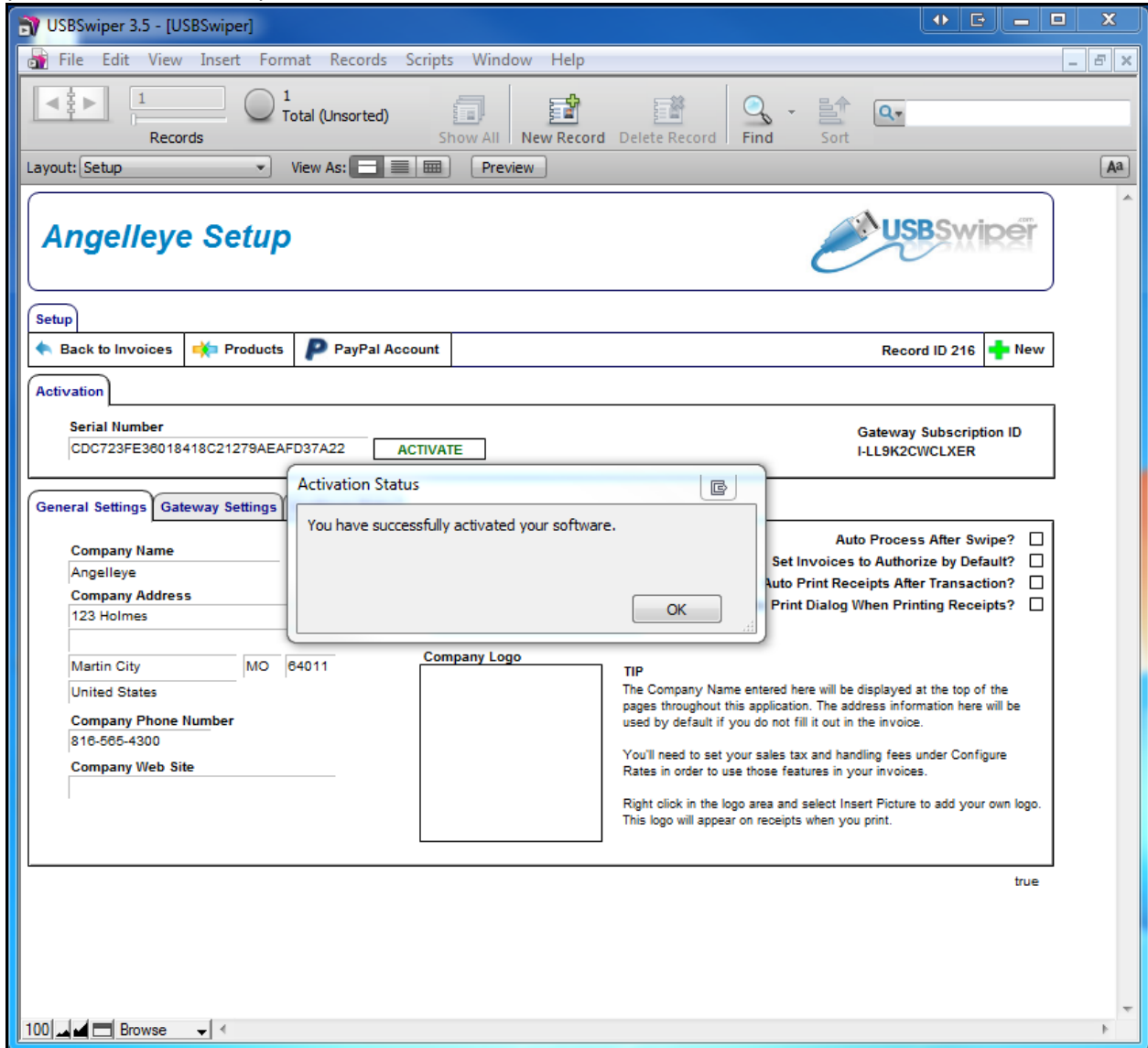


**STEP SIX:** Activating USB Swiper

Once you've successfully created your password and are logged in, you will be presented with the Setup Screen.

Copy/Paste your Serial Number into the Serial Number field click the Activate Button.

You will be presented with a Successful Activation Message and a new setup record will be created with your information from your online order.





## STEP SEVEN: Interface USBswiper with your Merchant Account

Select the Gateway Settings Tab and the Subtab that applies to your Merchant Account.

The screenshot displays the USBswiper.com Setup interface. At the top, there is a navigation bar with tabs for 'Setup', 'Products', and 'PayPal Account'. Below this, the 'Activation' section shows a 'Serial Number' field with the value '61147CC9B168BE0DC0804430A29784A3' and an 'ACTIVATE' button. To the right, the 'Gateway Subscription ID' is 'I-LK02HLG64JU5'. The 'Gateway Settings' tab is selected, and the 'Payments Pro' subtab is active. The 'Active Payment Gateway?' dropdown is set to 'Payments Pro'. The main form area contains fields for 'PayPal API Username', 'PayPal API Password', 'PayPal API Signature', 'PayPal IPN (Notify URL)', and 'PayPal Email Address'. The 'PayPal Email Address' field contains 'sandbo\_1204199080\_biz@angelleye.com'. A 'TIP' section provides instructions on how to obtain API information from a PayPal profile. A 'Connect USBswiper to PayPal' button is visible, and the 'Certificate Mode' checkbox is checked. The interface also includes a 'Records' section at the top with a search bar and a 'Total (Unsorted)' indicator.

The Gateway Settings Tab allows you to select the Merchant Gateway you will use to process a credit card transaction.



**USB Swiper-PayLeap Users** must enter their USB Swiper-PayLeap Credentials. The information required here is the exact same information you use when logging into your online USB Swiper-PayLeap Account. Go to STEP EIGHT.

USB Swiper-PayLeap Payments Pro PayFlow Pro Authorize.net Active Payment Gateway? USB Swiper-PayLeap

API Username  
[Click Here to Add API Username](#)

API Password  
[Click Here to Add API Password](#)

**TIP**  
You will use the same username and password here that you use to login to your PayLeap account online.

**Payments Pro Users** must verify the PayPal Email Address matches the Primary Email Address on their PayPal Account, Select the Certificate Mode box and leave all other PayPal API fields blank. (You don't need to click on the Connect USB Swiper to PayPal button.) Go to STEP EIGHT.

Payments Pro PayFlow Pro Authorize.net Active Payment Gateway? Payments Pro

PayPal API Username  
[Click Here to Add Username](#)

PayPal API Password  
[Click Here to Add Password](#)

PayPal API Signature  
[Click Here to Add Signature](#)

PayPal IPN (Notify URL)  
\_\_\_\_\_

PayPal Email Address  
sandbo\_1204199080\_biz@angelleye.com

**TIP**  
This information is available in your PayPal profile. Log into your PayPal account, click on Profile, and then click on API Access under the Account Information section on the left.

If your account is currently setup to use the certificate method of authentication with PayPal vs. the Signature method you will need to either switch to Signature mode or contact USB Swiper for further instructions.

[Connect USB Swiper to PayPal](#)

Certificate Mode

**PayFlow Pro Users** must enter their PayPal Manager Credentials. The information required here is the exact same information you use when logging into your PayPal Manager Account. Go to STEP EIGHT.

Payments Pro PayFlow Pro Authorize.net Active Payment Gateway? PayFlow Pro

Partner  
[Click Here to Add Partner](#)

Merchant Login  
[Click Here to Add Merchant](#)

Username  
[Click Here to Add Username](#)

Password  
[Click Here to Add Password](#)

**TIP**  
Username and Vendor are usually the same thing unless you've created separate user accounts, in which case you'll use those values for username and password but your original username as Vendor.



**Auth.Net Users** must enter their Auth.Net credentials. This information can be found by logging into your Auth.Net account, under My Account Tab then the Settings link.

Go to STEP EIGHT.

<b>Payments Pro</b>	<b>PayFlow Pro</b>	<b>Authorize.net</b>	<b>Active Payment Gateway?</b> <input type="text" value="Authorize.net"/>
<b>API Login ID</b> <input type="button" value="Click Here to Add API Login ID"/>		<b>TIP</b> This information is available by logging into your Authorize.Net account. Click on the My Account Tab, then click on the Settings link on the left side then click on the API Login ID and Transaction Key link. If you need further instructions, please contact USB Swiper.	
<b>API Transaction Key</b> <input type="button" value="Click Here to Add Transaction Key"/>			
<b>IPN (Notify URL)</b> <input type="text"/>			

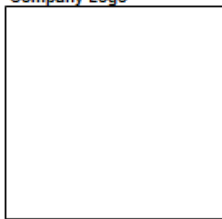


### STEP EIGHT: User Preferences

During this step, you will configure the software to meet your business needs.

The General Settings Tab allows you to alter the receipt layout. Make any necessary changes to your company information as you would like it appear on the Sales Receipt. \*For those using a thermal receipt printer, be sure to change the Printer Type from 8.5x11 Receipt to 2.25 in. Receipt.

General Settings Gateway Settings Configure Rates

<b>Company Name</b> USB Swiper.com	<b>Printer Type</b> 8.5 x 11 Receipt	<b>Auto Process After Swipe?</b> <input type="checkbox"/>
<b>Company Address</b> 830 W Route 22 #235	<b>Default Currency</b> USD U.S. Dollar	<b>Set Invoices to Authorize by Default?</b> <input type="checkbox"/>
<b>City/State/Zip</b> Lake Zurich IL 60047	<b>Company Logo</b> 	<b>Auto Print Receipts After Transaction?</b> <input type="checkbox"/>
<b>Country</b> United States		<b>Disable Print Dialog When Printing Receipts?</b> <input type="checkbox"/>
<b>Company Phone Number</b> 877-466-1118		
<b>Company Web Site</b> www.usbswiper.com		

**TIP**  
The Company Name entered here will be displayed at the top of the pages throughout this application. The address information here will be used by default if you do not fill it out in the invoice.  
You'll need to set your sales tax and handling fees under Configure Rates in order to use those features in your invoices.  
Right click in the logo area and select Insert Picture to add your own logo. This logo will appear on receipts when you print.

The Configure Rates Tab allows you to setup [Sales Tax, Discounts or Handling Fees](#).

General Settings Gateway Settings Configure Rates

Sales Tax Discount Codes Handling Fees

City/County	Rate
<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/> %
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

**Default Sales Tax for New Invoices?**

Products (above the Serial Number) allow you to setup your [Inventory](#).

Setup

[Back to Invoices](#) [Products](#) [PayPal Account](#) Record ID 223 [New](#)

Activation

**Serial Number**  
61147CC9B168BE0DC0804430A29784A3 [ACTIVATE](#)

**Gateway Subscription ID**  
I-LK02HLG64JU5

For more help setting up your User Preferences, please click on the links to view a video demonstration. \*Reminder: All clickable links are underlined and highlighted in blue.

If you have general questions please email [support@usbswiper.com](mailto:support@usbswiper.com) or to schedule an upgrade session please call (816)332-6545 between 9am-3pm Central Time.