Routematch

Pay
User Guide

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RouteMatch Software, Inc.

Pay

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Pay is Routematch's independent, cloud-based account and fare management system. Pay supports the creation and management of a wide variety of fare media types (smart cards, QR codes, mobile tickets, and legacy swipe cards), and supports monitoring, data collection, and management of all fare collection devices within an agency's system. With the mobile app for Pay, riders can debit and credit accounts, or purchase passes right from their smartphones. Web Portal users are kept up to date on the status of their applications, reservations, and other information via email or through the portal itself. Pay is accessed through secure web portals for riders and agency users, and integrates directly with an appointed payment service provider for all credit card processing. Drivers use the Pay driver application to process rider payments.

Pay User Guide

This User Guide explains the features of the Pay solution. It details how riders, transit agency administrators, and drivers use Pay's various components. Each section contains instructions on how to use each feature of Pay. These instructions address the user directly, so that readers of this guide can more easily assist themselves or other users of Pay.

Chapter 1: Rider Web Portal explains how customers access the portal and create an account, manage payment options and smartcards, and view their transaction history and trips.

Chapter 2: Demand Agency Web Portal discusses how agency users log in, search for customers, manage customer payment options and smartcards, generate reports, and configure agency portal access settings for other agency users.

Chapter 3: Mobile Ticketing explains how riders use all features within Mobile Ticketing, including accessing the app, creating an account, purchasing a ticket, activating a ticket, and using the Trip Planner.

Chapter 4: Demand Agency Web Portal for Mobile Ticketing allows an agency to search for riders and manage their accounts, review transaction and ticket information, generate reports, and release mobile tickets for riders when they need assistance.

Chapter 5: Mobile Driver Application covers the driver component of Pay. This chapter describes how drivers process the various payment options available to riders using Pay's Mobile Driver Application.

CHAPTER 1

Pay Demand Rider Web Portal

The Pay Rider Web Portal allows customers to manage their payment options and view their transaction and trip histories. This section of the guide details how to use each of the features available within the Rider Web Portal.

This chapter discusses the following:

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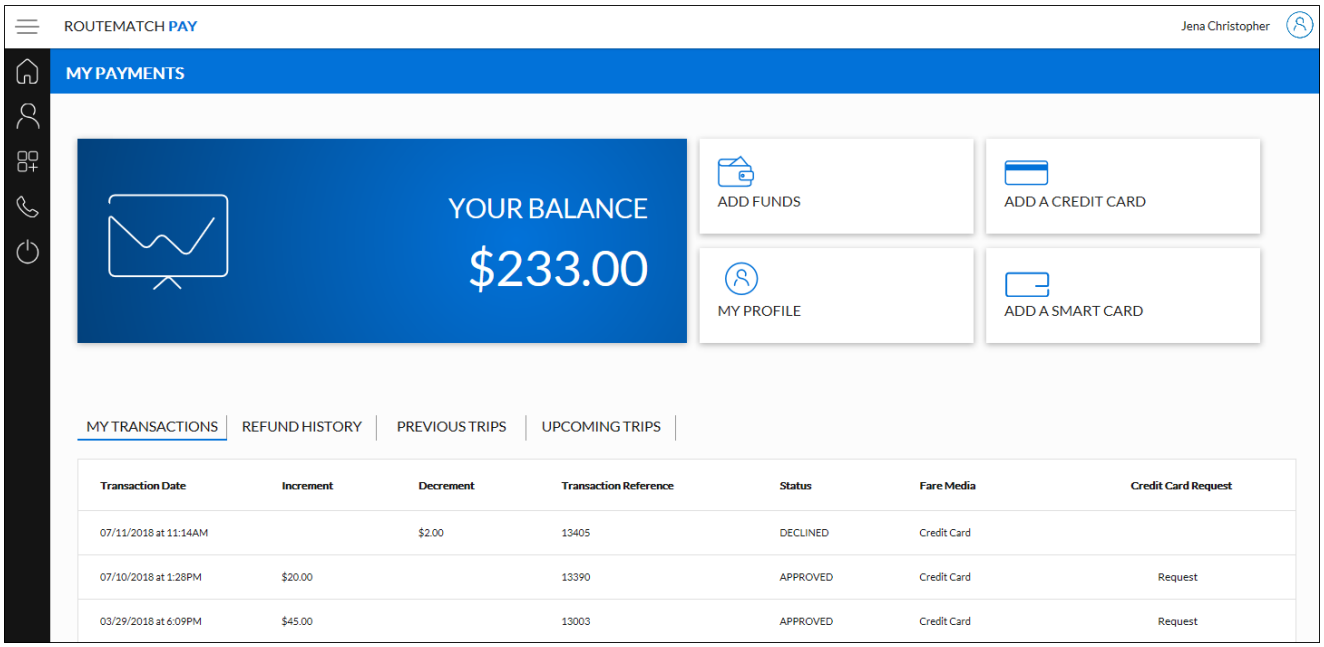
Accessing the Pay Rider Web Portal

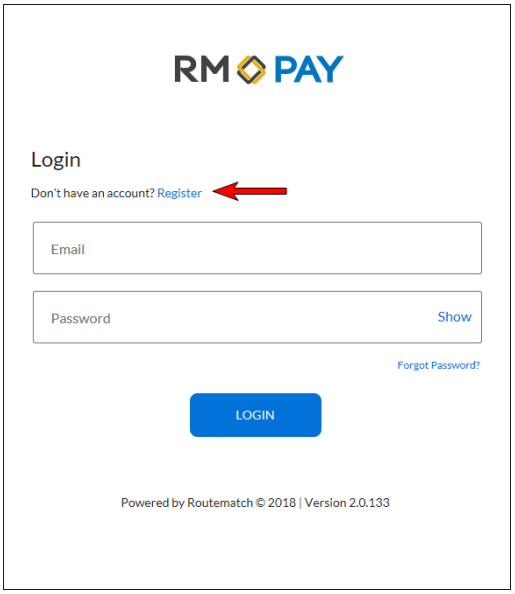
Users can access the Rider Web Portal through their web browsers (Internet Explorer, Firefox or Google Chrome) and devices that have a working connection to the internet. A user may access the Web Portal through a link or URL provided by your agency. Many agencies will commonly provide a link on their websites. Once users open the portal, they can place an icon directly on their desktops or create a bookmark in their internet browsers for easy access.



Creating a Pay Demand Pay Rider Account

To create a Pay Rider account:

1. Enter the URL for the Rider Web Portal in your internet browser. Your agency will provide you with the URL.
2. Click the **Register** link on the Pay Login page.



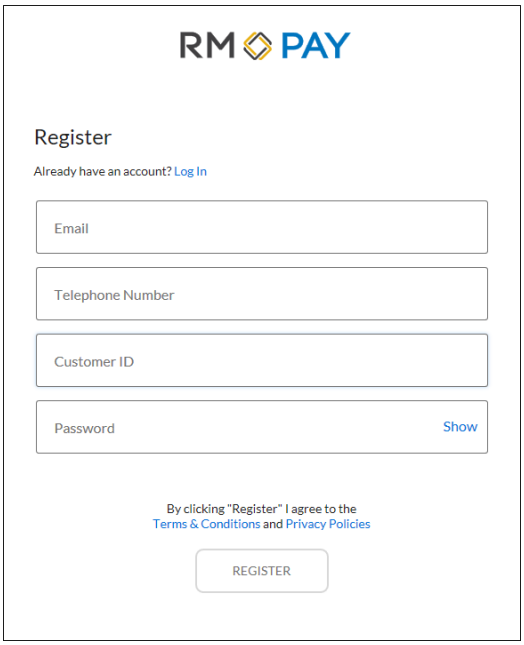
3. Complete the following registration fields:
   - Email
   - Telephone Number
   - Routematch ID

     > **Note:** Only enter your RouteMatch ID if you share a telephone number with another user. Your agency will provide you with your Routematch ID.

   - Password
   - Confirm Password

     > **Note:** Your account password must be between 8 and 20 characters and must contain at least one uppercase letter and one number or special character. Example: **blueBus3**

4. After you complete the fields, click the **Register** button.

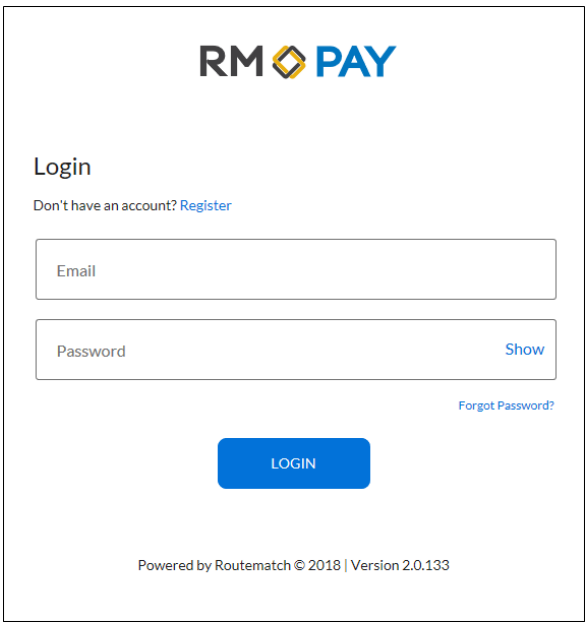


5. An error message will display if you fail to complete a field or enter invalid information. A confirmation page will appear when you successfully register.

Logging In to the Portal

After you have created an Pay account, you can log in to the Rider Web Portal as follows:

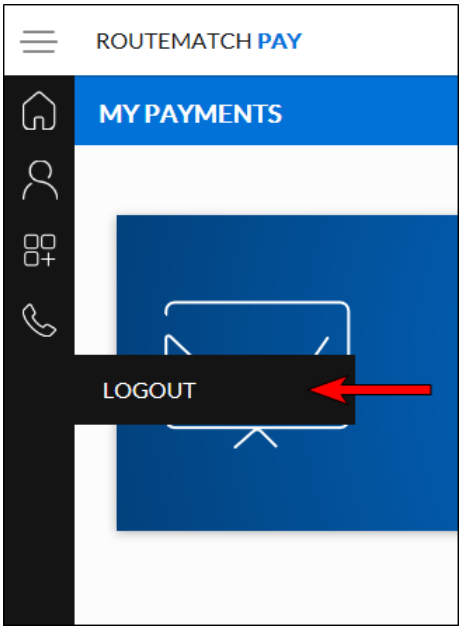
1. Enter your newly created user name and password on the login page.



2. Click the **Login** button. The PayRider Web Portal home page will display.

Logging Out of the Portal

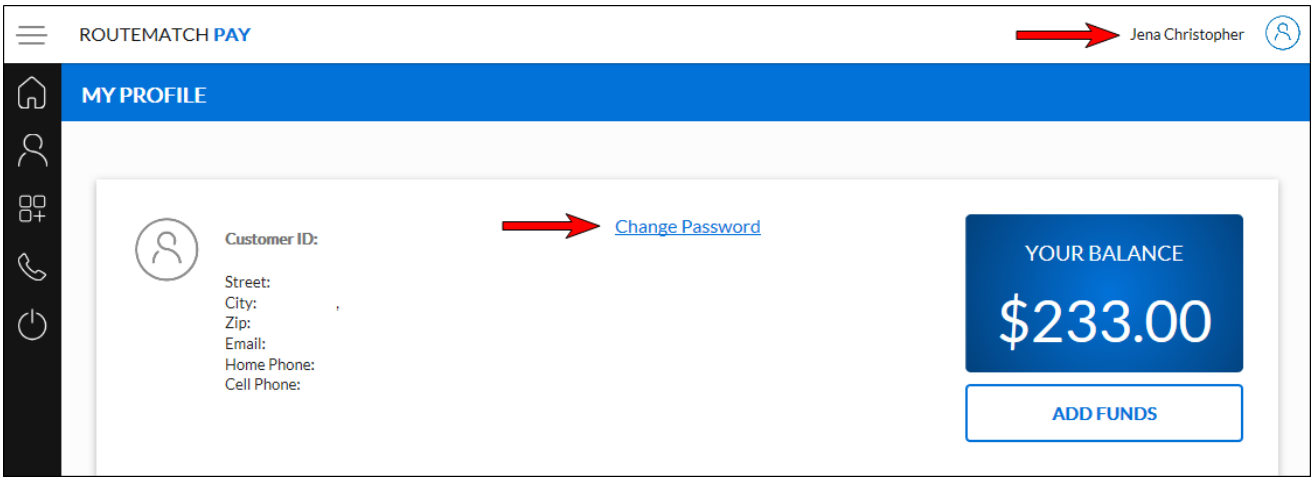
From the side menu on the Pay Rider Web Portal home page, click **Logout** to exit RMPay. When you log out, Pay will direct you to the main login page.



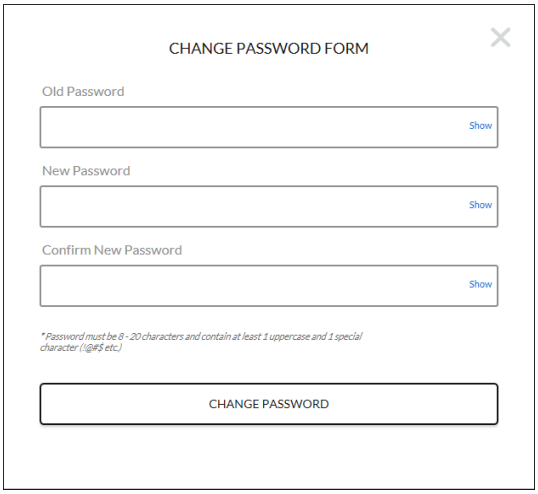
Changing Your Pay Password

If you wish to change your Pay password, follow these steps:

1. From the Pay Rider Web Portal main page, click on the profile icon.
2. Click the **Change Password** button.



3. Enter your **Old Password**, **New Password**, and then **Confirm New Password**.

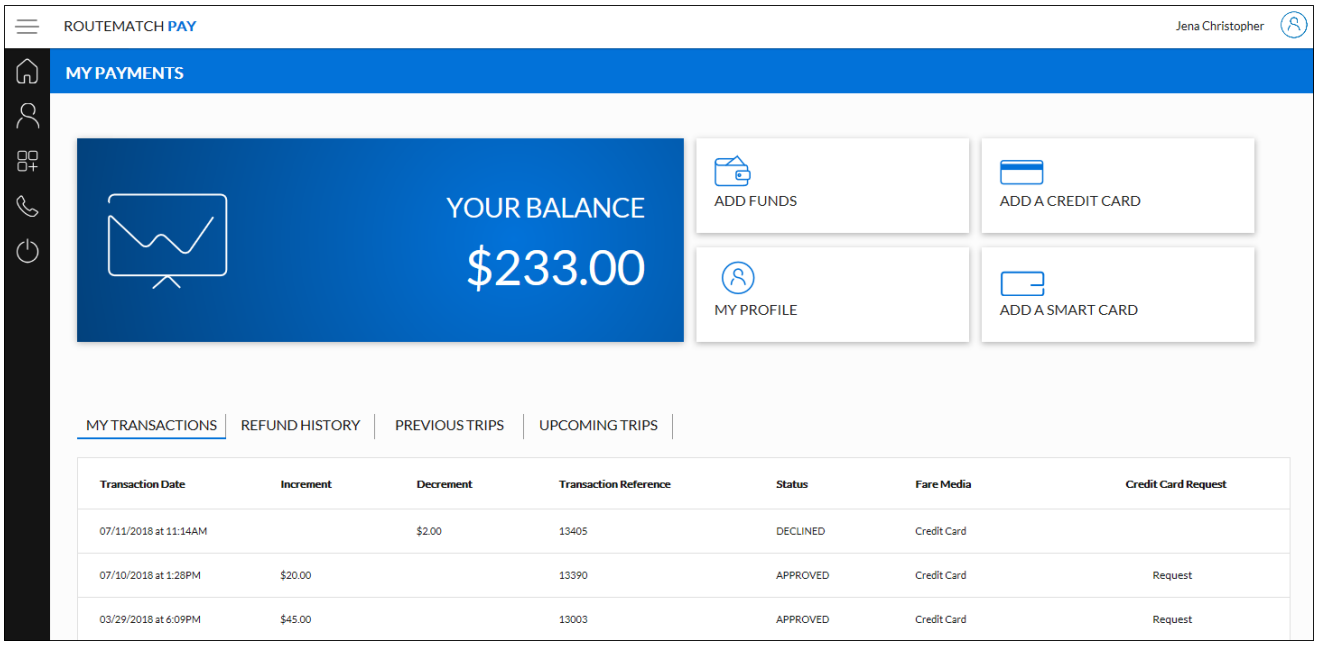


> **Note:** Your account password must be between 8 and 20 characters and must contain at least one uppercase letter and one number or special character. Example: **blueBus3**

4. Click **Change Password**. Your password will now be changed.

Using the Pay Rider Web Portal

The Pay Rider Web Portal allows customers to view and manage their accounts. When a rider logs in, Pay will display the Rider Web Portal home page. This page displays the customer's profile picture (should they choose to upload one), address, contact information, and account balance. The page also displays the customer's transaction, trip, and refund histories.



> **Note:** You cannot update your profile information through Pay. Your profile information is pulled from the main Routematch system. You must use your agency's existing process for making account information changes.

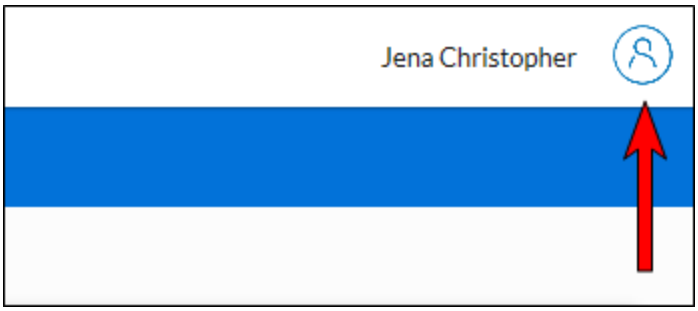
Managing Credit Cards

This section covers adding a new credit card, removing a credit card, and editing your billing address using Pay.

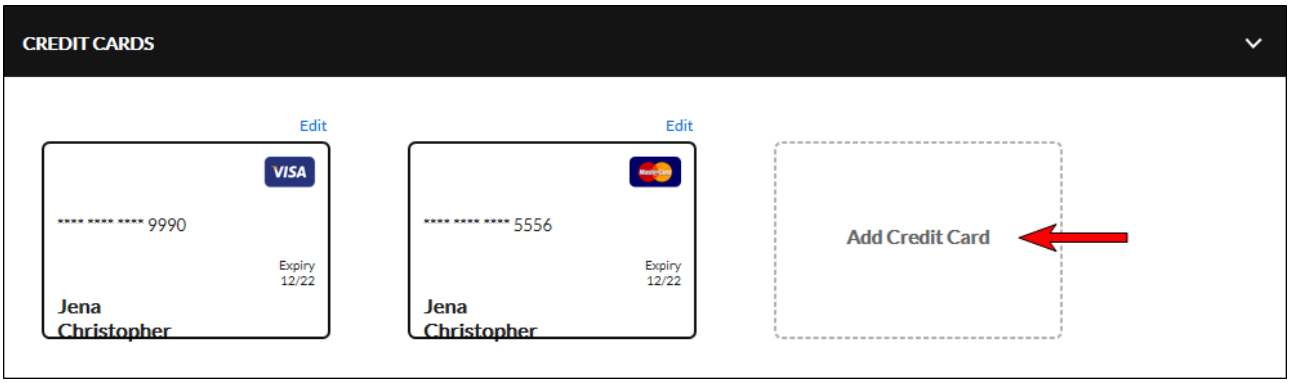
Adding a Credit Card

To add funds to your account, you must save one or more credit or debit cards to your account. To do this:

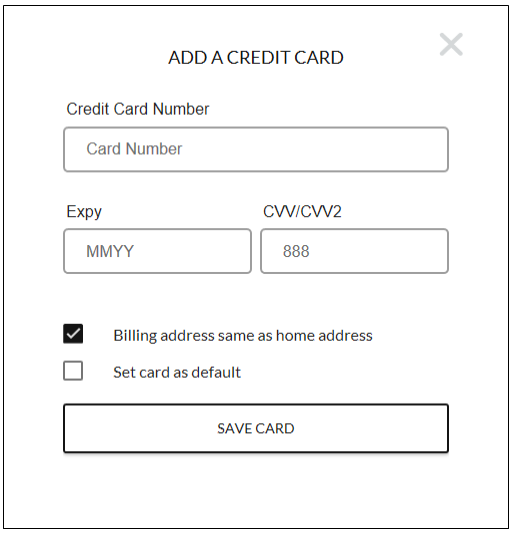
1. Access the user profile page by clicking on the profile icon in the top right hand corner of the page, as pictured below.



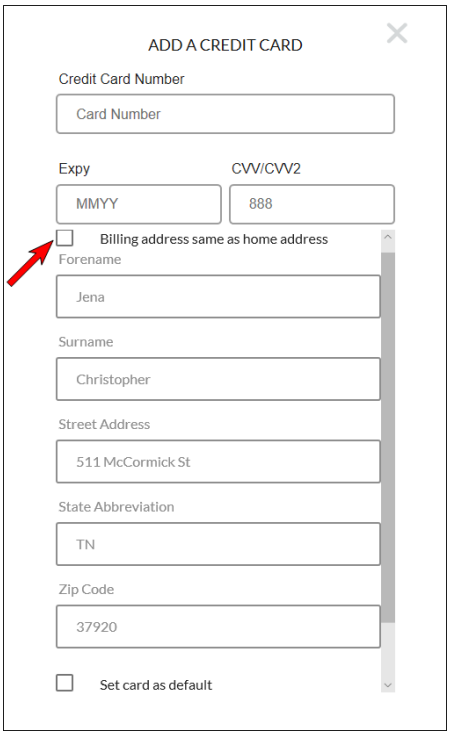
2. Click on the **Add New Card** button in the middle of the page under the **Credit Cards** section.



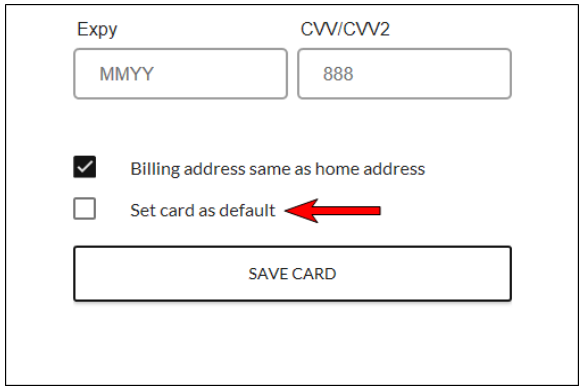
3. Enter a valid credit or debit card number, the card's expiration date (in MM/YY format), and the card's CVV/CVV2 number (Card Verification Value).



4. You then have the option to select "Billing address same as home address."
    a. This option is selected by default. With this option selected, Pay will draw on your existing address as recorded in the main Routematch application.
    b. You can instead choose to enter a new billing address for the card by deselecting this option. Once deselected, fields for the name of the card holder, street address and zip code will appear.



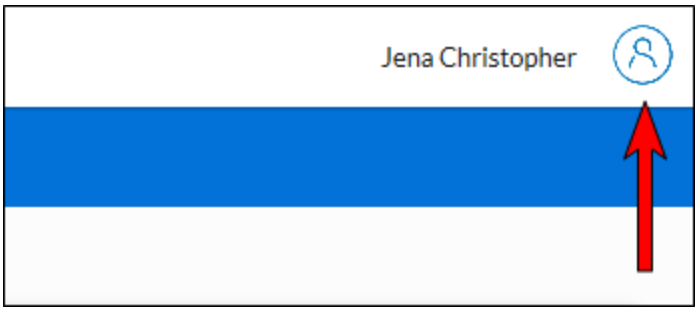
5. You have the option to "Set card as default." If you select this option, Pay will use the assigned card for future transactions within Pay. This option is not selected by default.



6. Click the **Save Card** button to complete the process of adding a new card.

Editing Your Billing Address

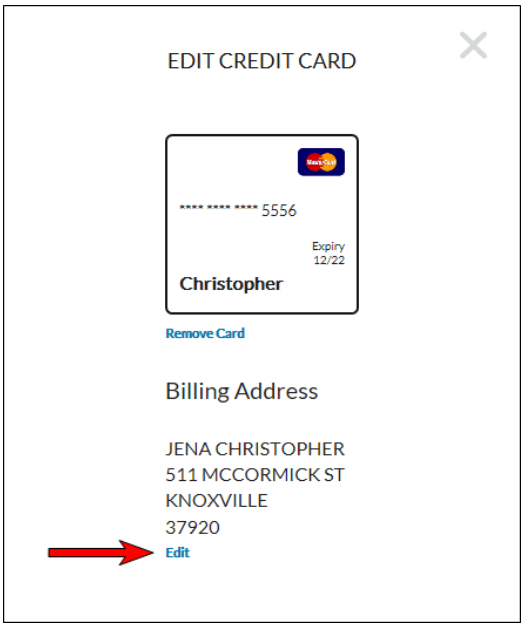
1. Access the user profile page by clicking on the profile icon in the top right hand corner of the page, as pictured below.



2. Click the **Edit** button next to one of your saved cards in the middle portion of the page.

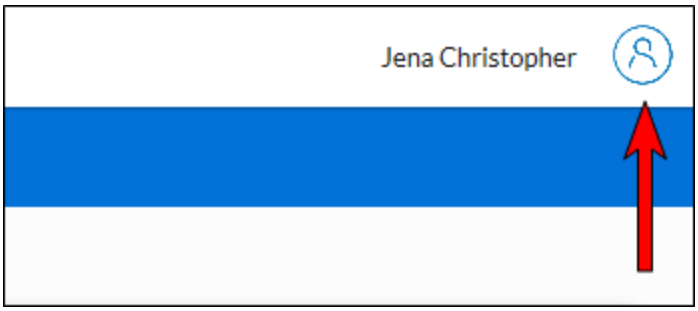
3. Click the **Edit** button underneath your current billing address. You will then be able to

edit or change your billing address.



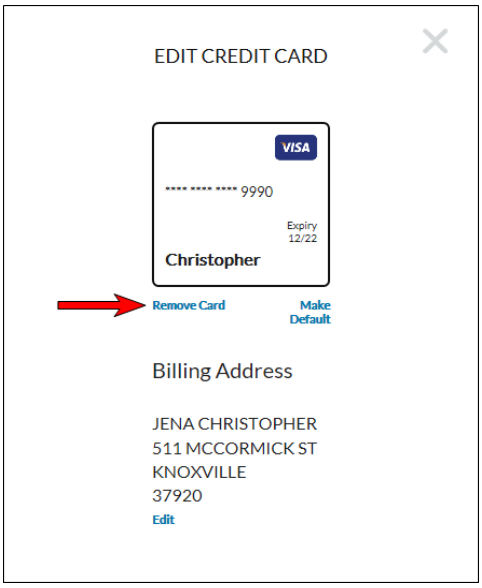
Removing a Credit Card

1. Access the user profile page by clicking on the profile icon in the top right hand corner of the page, as pictured below.



2. Click the **Edit** button next to the card you wish to remove in the middle portion of the page.

3. Click the **Remove Card** button in the middle of the **Edit Credit Card** dialog box. The card will then be removed.

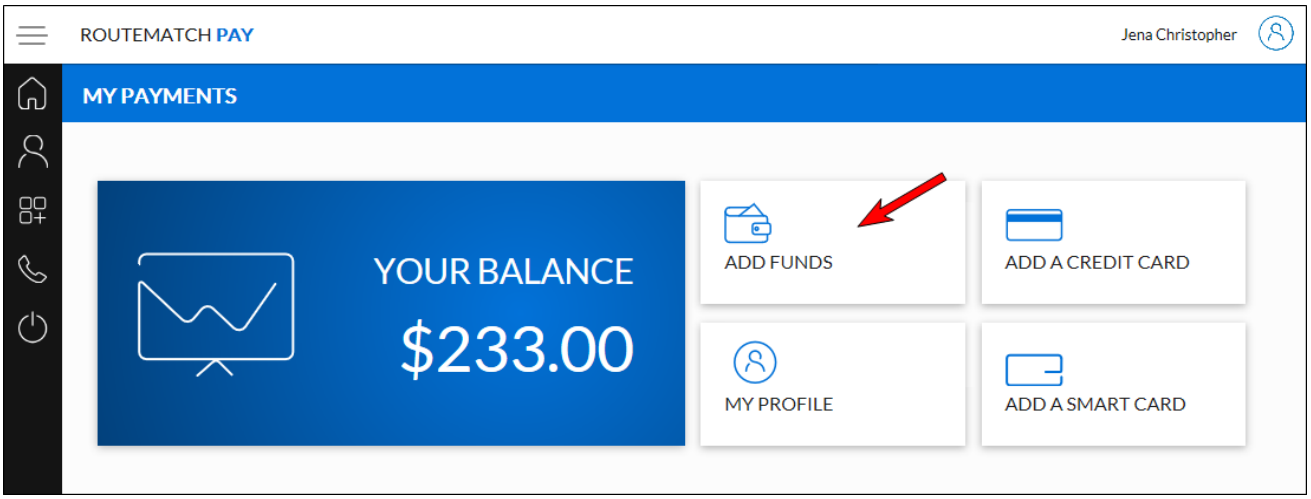


Adding Funds to an Account

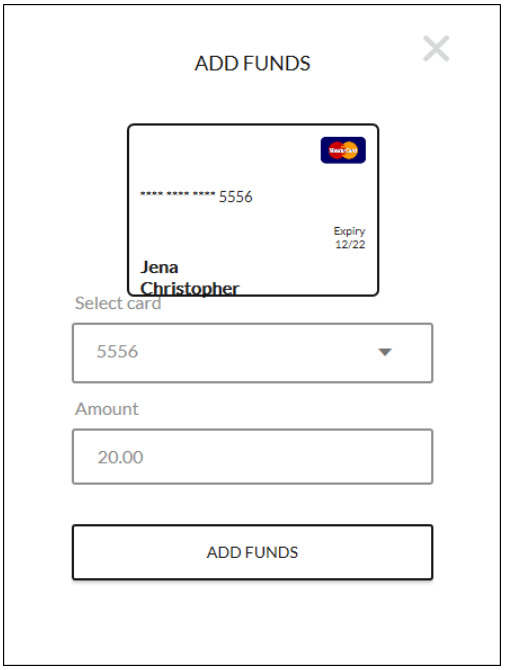
You can add funds to your account using a credit card.

To add funds to an account:

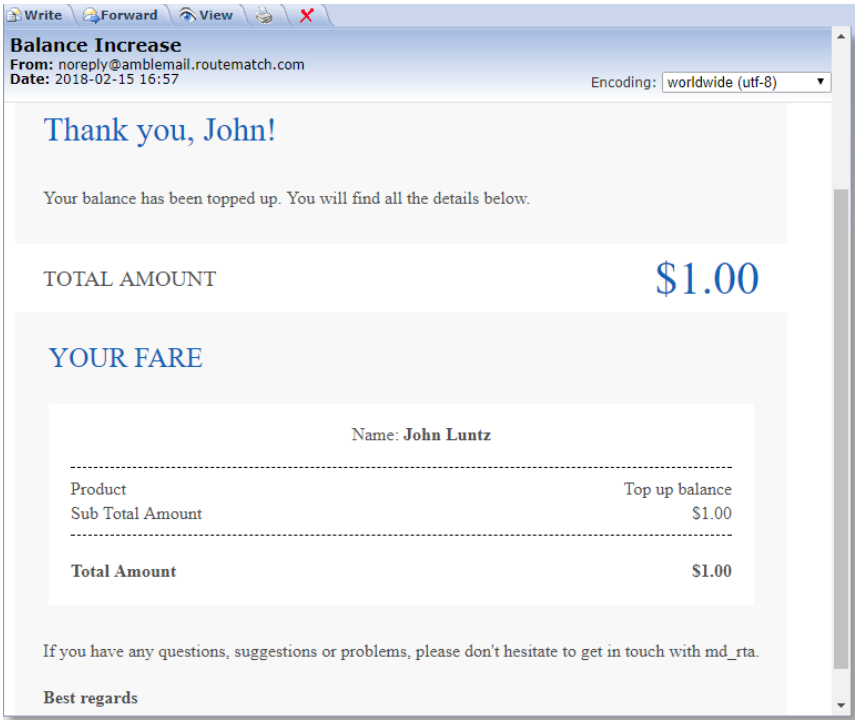
1. Click the green **Add Funds** button in the upper right hand corner of the home page.



2. After you add a credit card, it will be available to use from a drop-down menu. See Adding a Credit Card for these instructions.
3. Enter a valid credit or debit card number, the card's expiration date (in MM/YY format), and the card's CVV/CVV2 number (Card Verification Value). If you have already added a card, Pay will automatically fill in the card number field with the default card's number.



4. Enter the dollar amount to add to the account.
5. Click **Add Funds**. Your account balance increases by the indicated dollar amount. You will receive an email confirmation when your balance is reloaded.



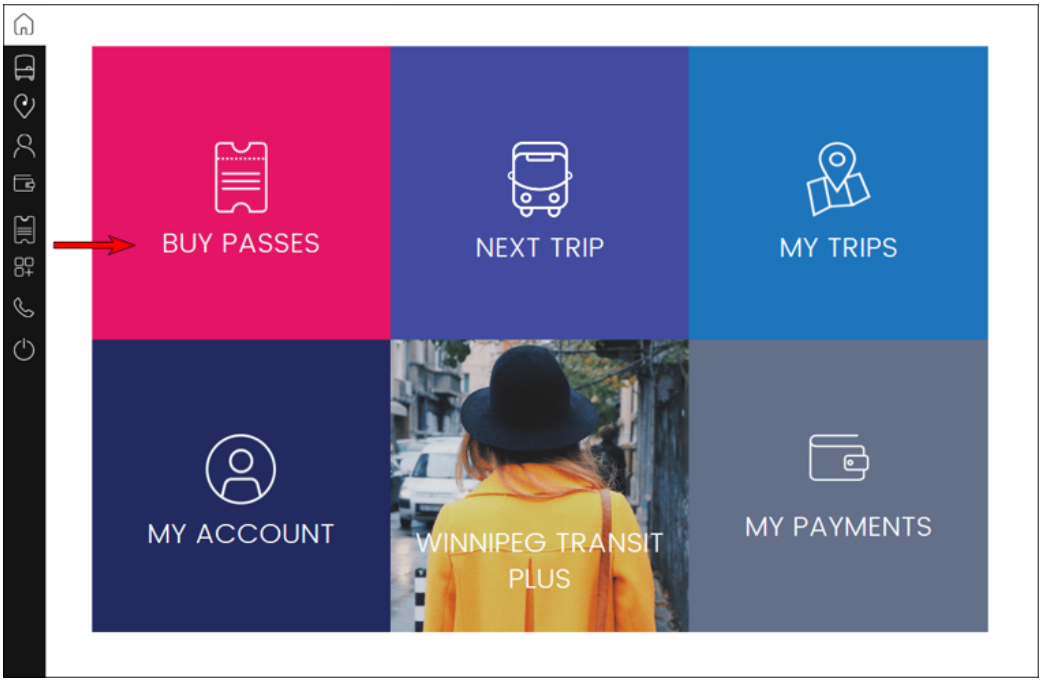
Purchasing Calendar Monthly Passes Using the Amble Rider Portal

If your agency has integrated the Amble and Pay Rider Web Portals and has enabled the Monthly Passes feature, you can purchase calendar monthly passes using the Amble Rider Web Portal.

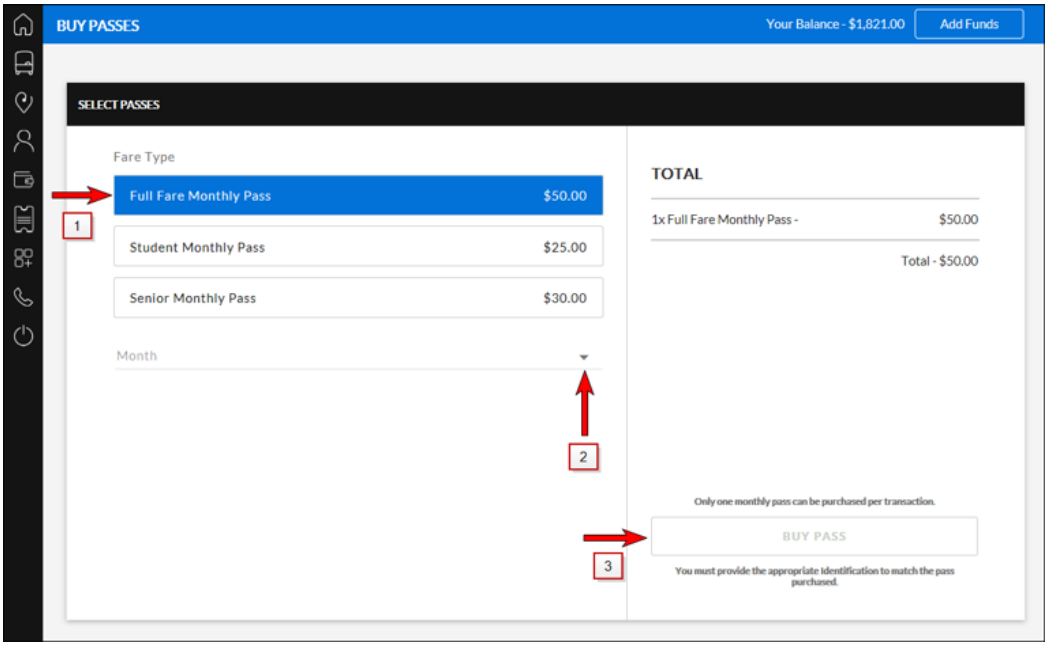
The Monthly Passes feature requires that all riders (account and non-account) have an Pay account created. A member of the Routematch deploy team will assist with the Pay account creation for riders that have a valid email address.

To purchase a monthly pass using the Amble Rider Web Portal:

1. Log in to the Amble Rider Web Portal.
2. Click **Buy Passes**.



3. Select a **Fare Type** from the available options that display.

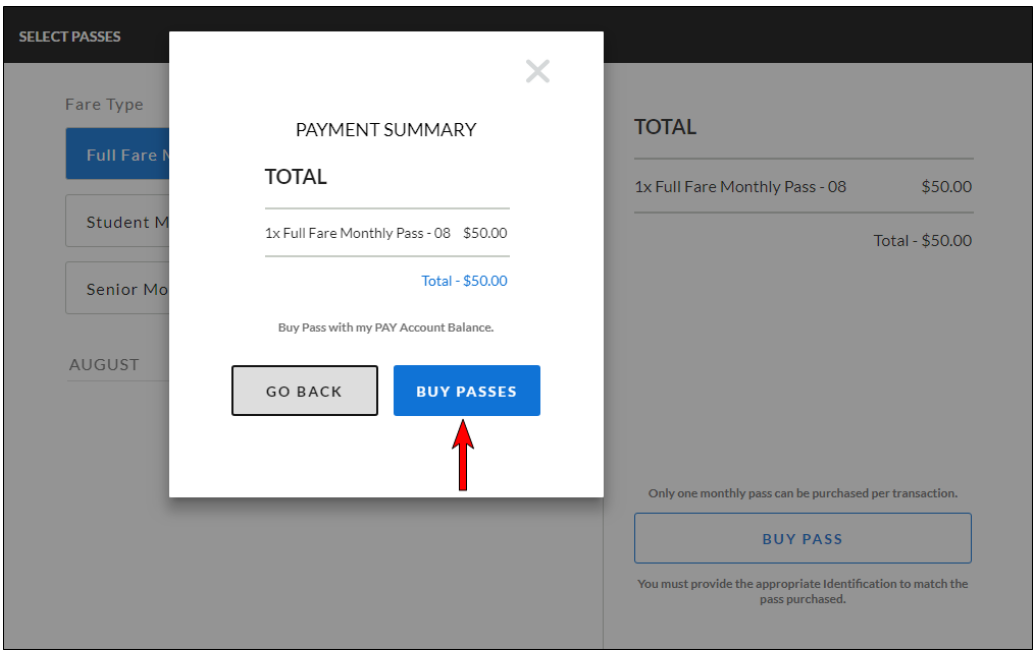


- **Full Fare Monthly Pass**
- **Student Monthly Pass**
- **Senior Monthly Pass**

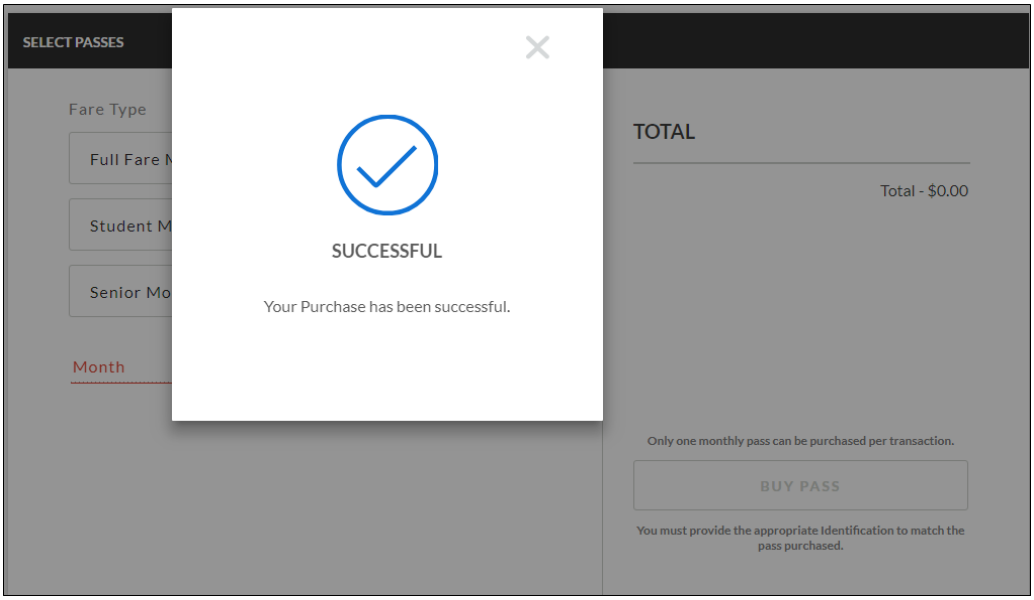
4. Select the month using the drop-down menu.

> **Note:** A calendar monthly pass is valid for unlimited rides for the entire calendar month and will expire at the end of the month.

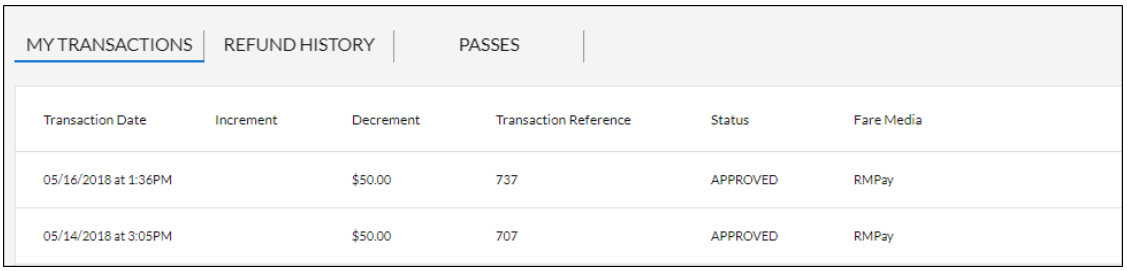
5. Click **Buy Pass**.
6. Click **Buy Passes** when the **Payment Summary** dialog displays.



7. A payment success message will display when the transaction is complete.



8. The transaction will be recorded and displayed in the **My Transactions** tab.



MY TRANSACTIONS | REFUND HISTORY | PASSES

Transaction Date	Increment	Decrement	Transaction Reference	Status	Fare Media
05/16/2018 at 1:36PM		$50.00	737	APPROVED	RMPay
05/14/2018 at 3:05PM		$50.00	707	APPROVED	RMPay

Managing Smart Cards

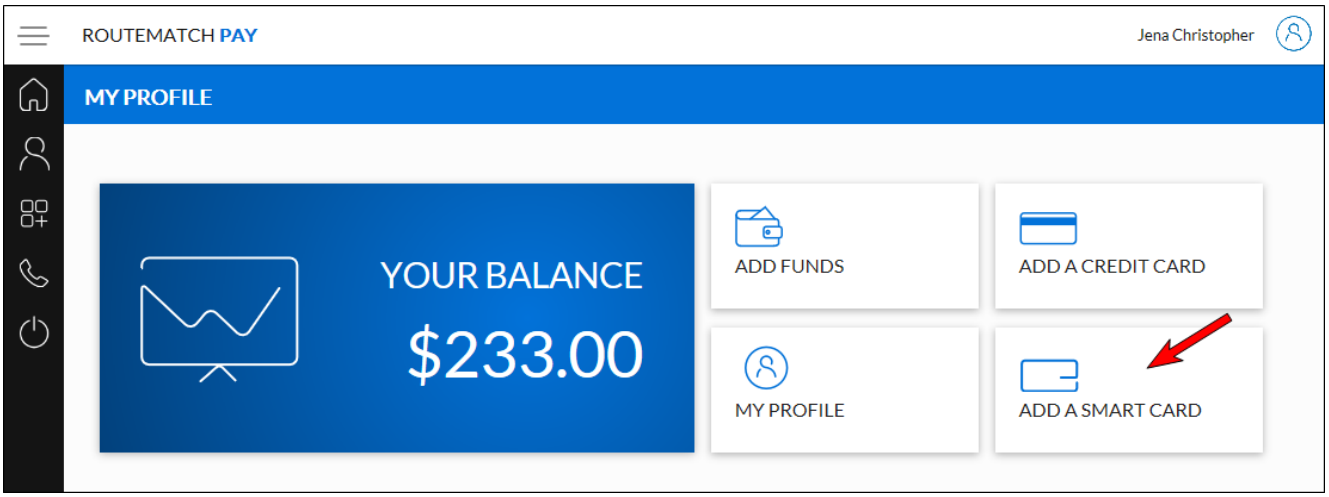
A smart card is a small plastic device (shaped like a credit card) that allows you to pay your transit fare quickly and easily once you board a vehicle. Contact your agency to acquire a smart card.

This section covers how to add a smart card to your RMPay account, as well as how to suspend or deactivate a smart card if it becomes lost, stolen, or if you no longer wish to use it.

Adding a Smart Card

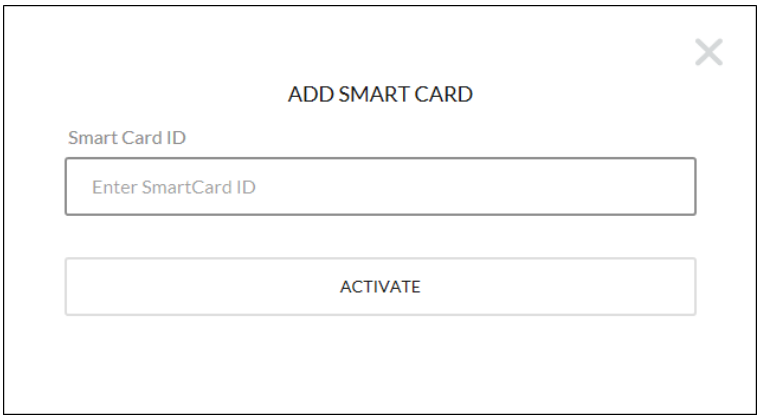
A smart card is a small plastic device (shaped like a credit card) that allows you to pay your transit fare quickly and easily once you board a vehicle. Contact your agency to acquire a smart card. Then, to add a smart card to your Pay account, follow these steps:

1. From the Pay Rider Web Portal home page, click on the **Add Smart Card** button.



2. [Option 2] You can also access the user profile page and click on the **Add Smart card** button.

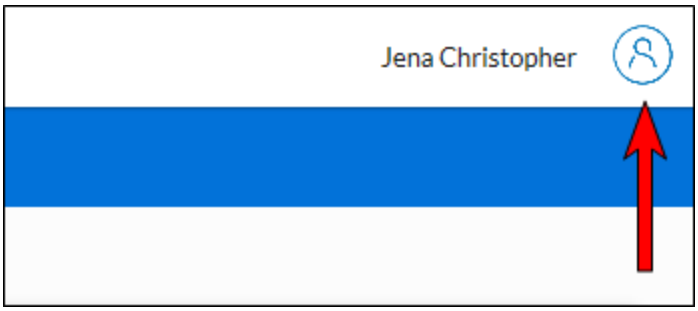
3. A dialog box will appear. Enter your smart card ID and click the **Activate** button. Your smart card will then be activated.



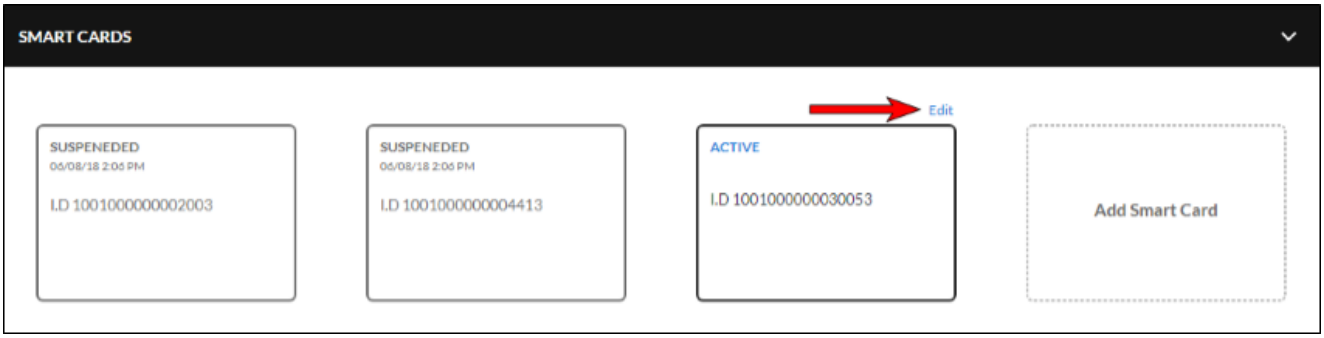
Suspending a Smart Card

You may wish to suspend your smart card if you lose it or you no longer need it. To suspend a smart card, follow these steps:

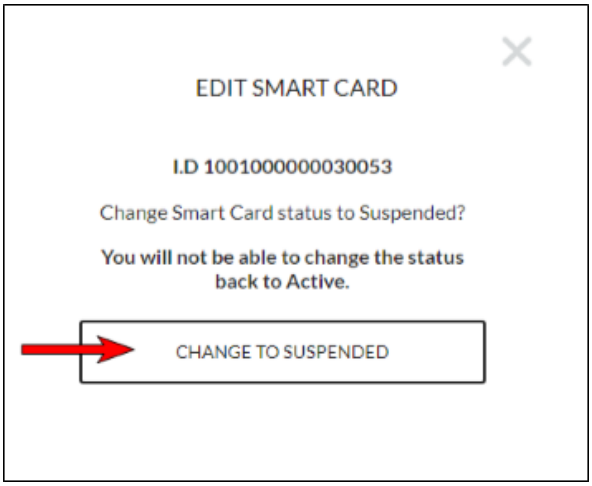
1. Navigate to user profile page. You can do this by clicking on the user profile icon in the top right hand corner of the page.



2. From the user profile page, choose the smart card which you would like to suspend. Your currently registered smart cards appear in the middle of the page.
3. Click the **Edit** button next to the card that you wish to suspend. The card will flip to show the back of the card.

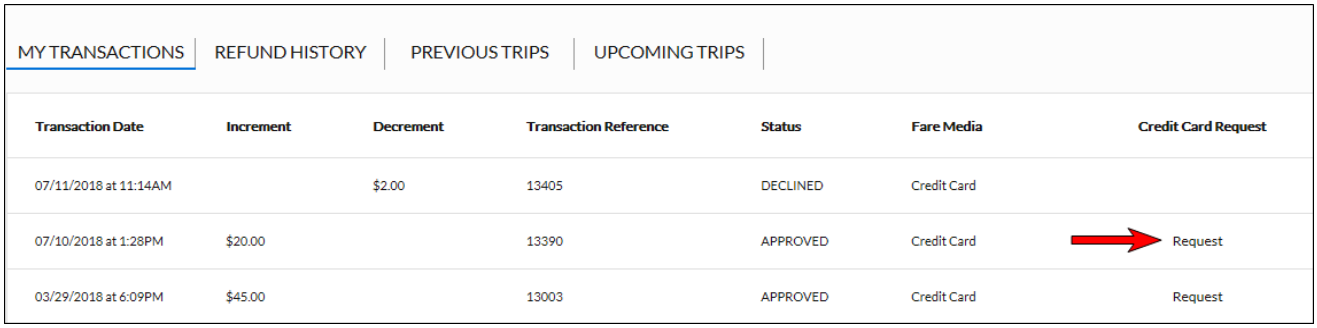


4. Click **Suspend**. Your card will be suspended. You cannot reactivate a smart card without first contacting your agency.



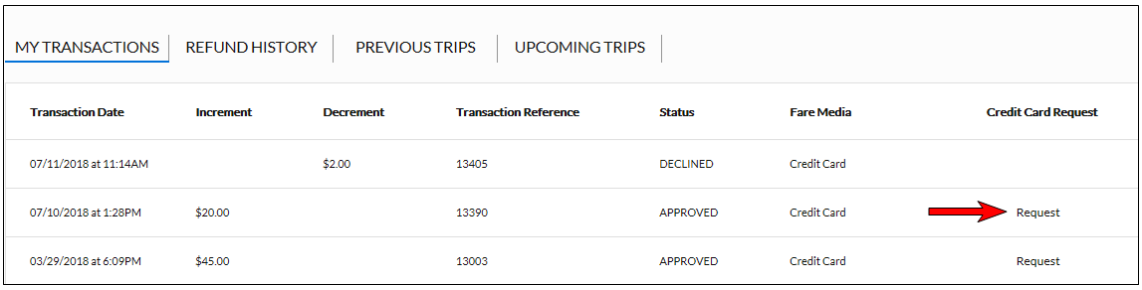
Viewing Transaction History

From the Pay Rider Web Portal home page, click on the **My Transactions** tab. The most recent transactions associated with your account display under this tab.

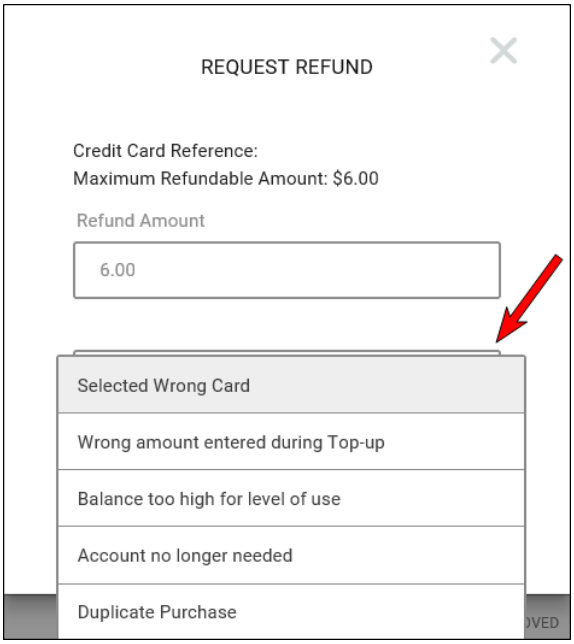


Requesting a Refund

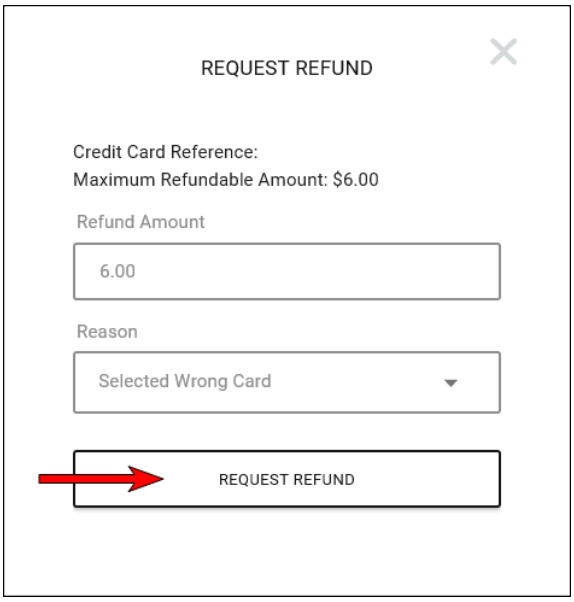
1. From the **My Transactions** tab, find the transaction that you want refunded, and click the **Request** button.



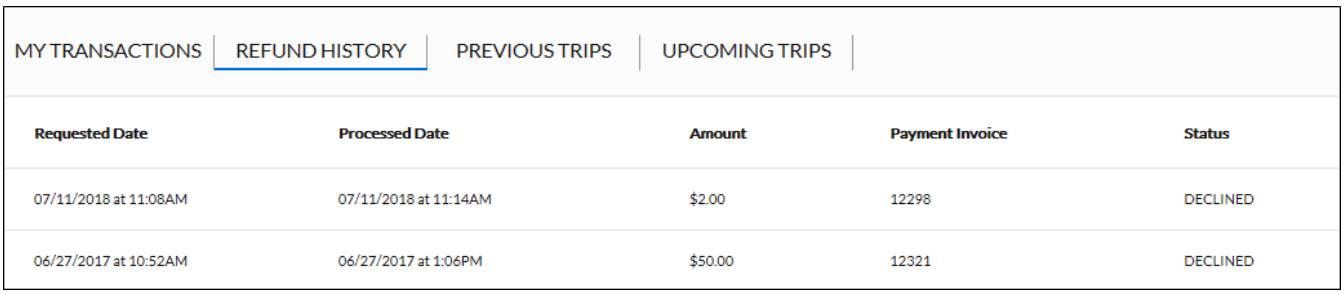
2. Enter the requested refund amount and select a reason from the drop-down menu for requesting the refund.



3. Click **Request Refund**.



4. You can then track the status of your refund request. To do this, navigate to the **Refund History** tab. The newly entered refund displays as a new entry.



Requested Date	Processed Date	Amount	Payment Invoice	Status
07/11/2018 at 11:08AM	07/11/2018 at 11:14AM	$2.00	12298	DECLINED
06/27/2017 at 10:52AM	06/27/2017 at 1:06PM	$50.00	12321	DECLINED

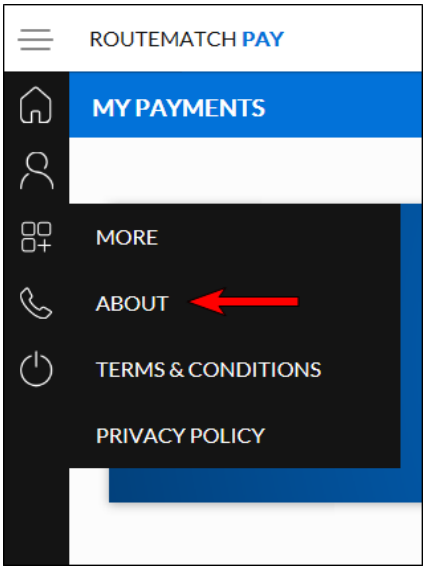
Other Pay Rider Web Portal Features

Viewing Upcoming & Previous Trips

Click the **Upcoming Trips** or **Previous Trips** tabs. Pay displays your trips for the past 14 days, and lists all of your upcoming trips for the next 30 days. The system does not display transactions that occurred prior to the agency's implementation of Pay.

Viewing the About Pay Page

Click the **About Pay** tab at the top of the page. This page gives users a basic overview of Pay.



CHAPTER 2

Pay Demand Agency Web Portal

The Pay Demand Demand Agency Web Portal allows an agency user to access customer information and control how riders use Pay. Agency users can review a rider's account, manage a rider's smart cards, and process rider refund requests. The Demand Agency Web Portal also allows users to generate various payment reports. Administrators will use the Demand Agency Web Portal to set access permissions for all other agency users.

This chapter discusses the following:

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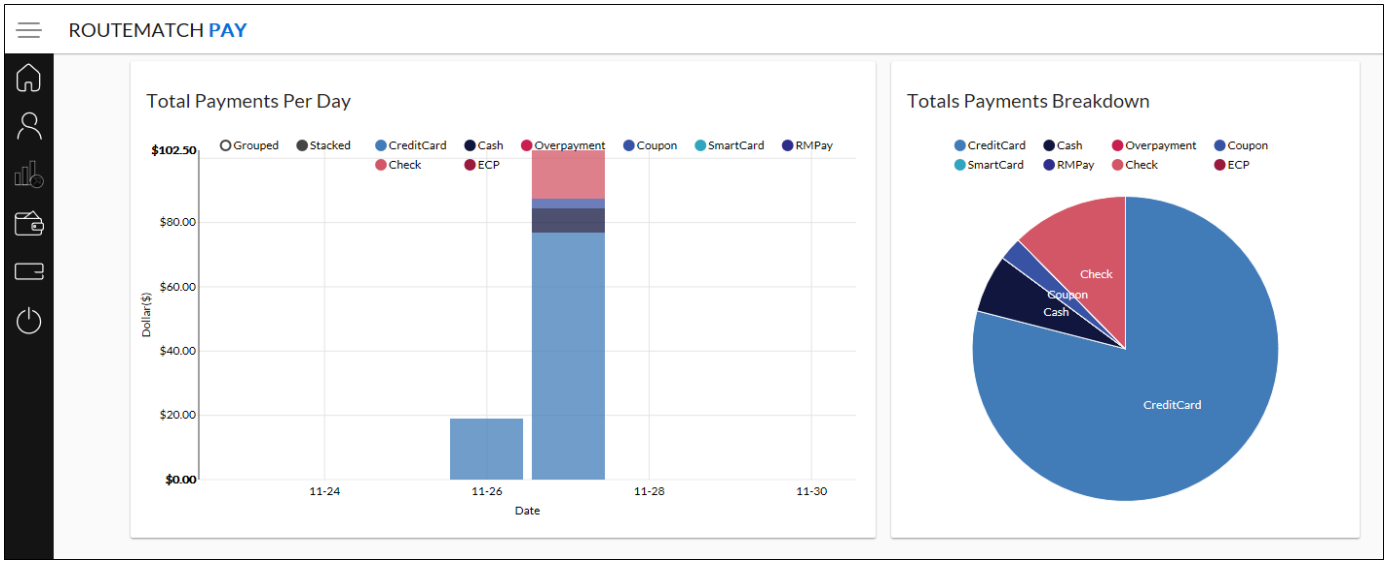
Accessing the Pay Demand Agency Web Portal

Users can access the Demand Agency Web Portal through their web browsers (Internet Explorer, Firefox or Google Chrome) and devices that have a working connection to the internet. A user may access the Pay Demand Agency Web Portal through a link or URL provided by your agency. Many agencies will commonly provide a link on their websites. Once users open the portal, they can place an icon directly on their desktops or create a bookmark in their internet browsers for easy access.

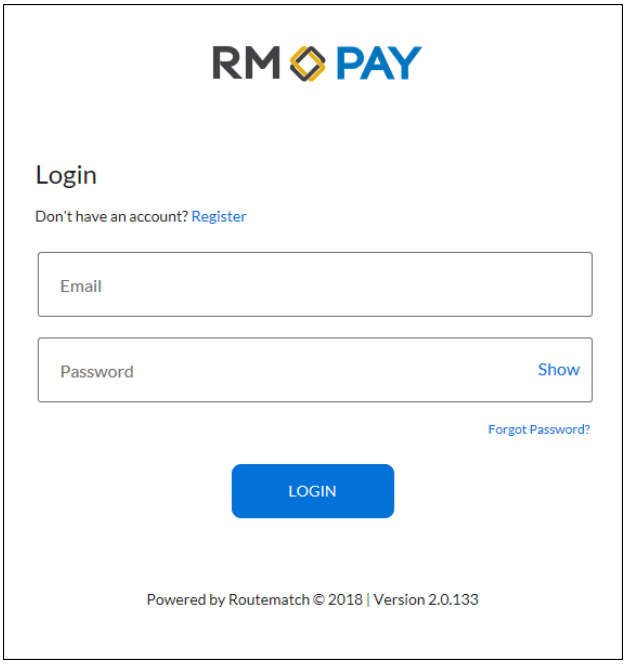


Logging In to the Demand Agency Portal

Agency users access the Demand Agency Web Portal through the same login page as riders. To log in to the Demand Agency Web Portal, complete these steps:

1. Enter your agency user name and password.

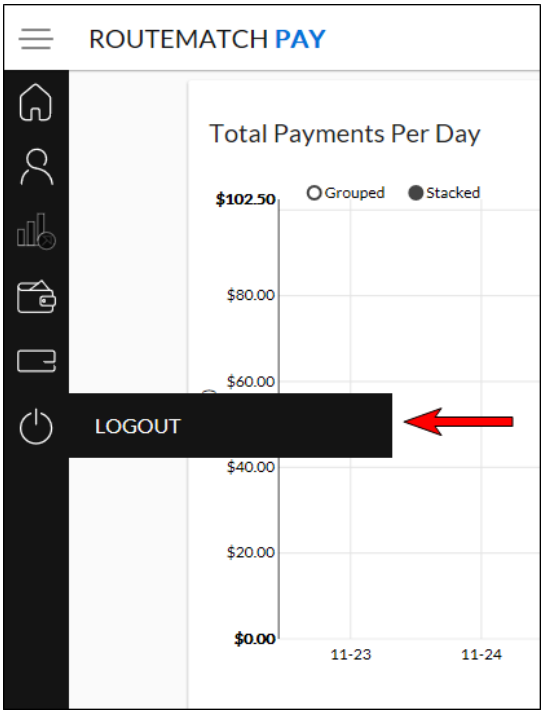
> **Note:** During the initial deployment of Pay, Routematch will provide the agency with login credentials for Demand Agency Web Portal users. Later, agency staff can grant agency users various levels of access through Pay itself.



2. Click the **Login** button. This will take you to the Demand Agency Web Portal home page.

Logging Out of the Demand Agency Portal

To log out of the system, simply click the **Logout** button at the bottom of the Demand Agency Web Portal navigation menu. This is important for security and tracking admin work in the system.



Pay Demand Agency Web Portal Home Page

The Demand Agency Web Portal home page shows information that is relevant to the agency. For example, some general information such as notifications, a message of the day, and graphs showing some numerical data can be seen on the home page.

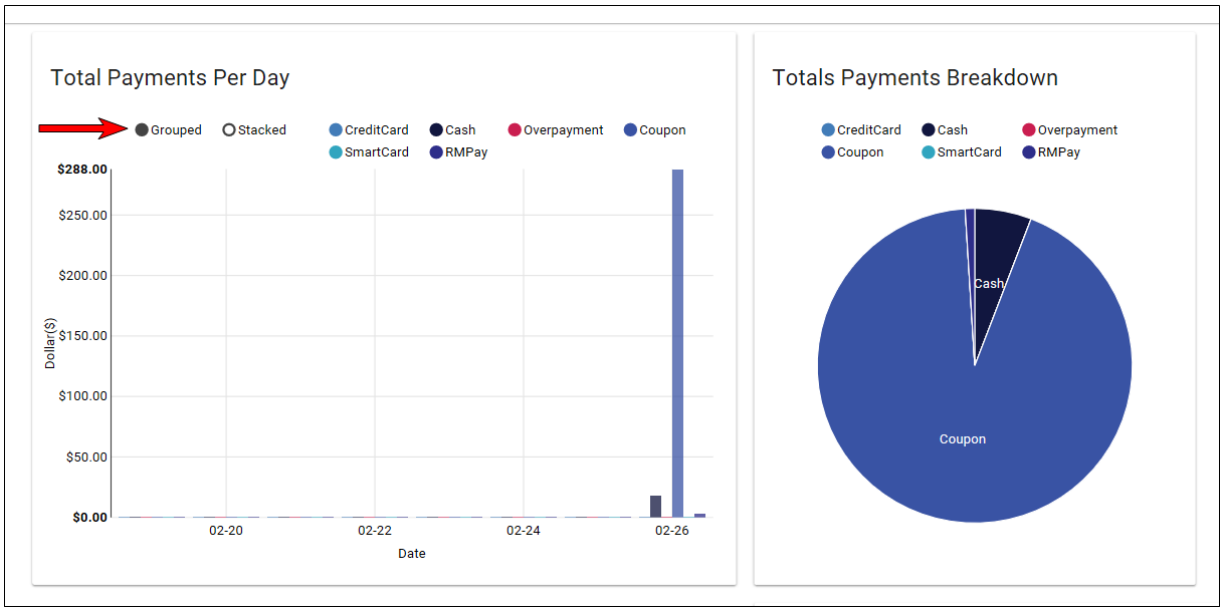
Pay Customizable Dashboard

The Demand Agency Web Portal home page features a customizable agency dashboard that displays several categories of information. By default, the following overview metrics are shown:

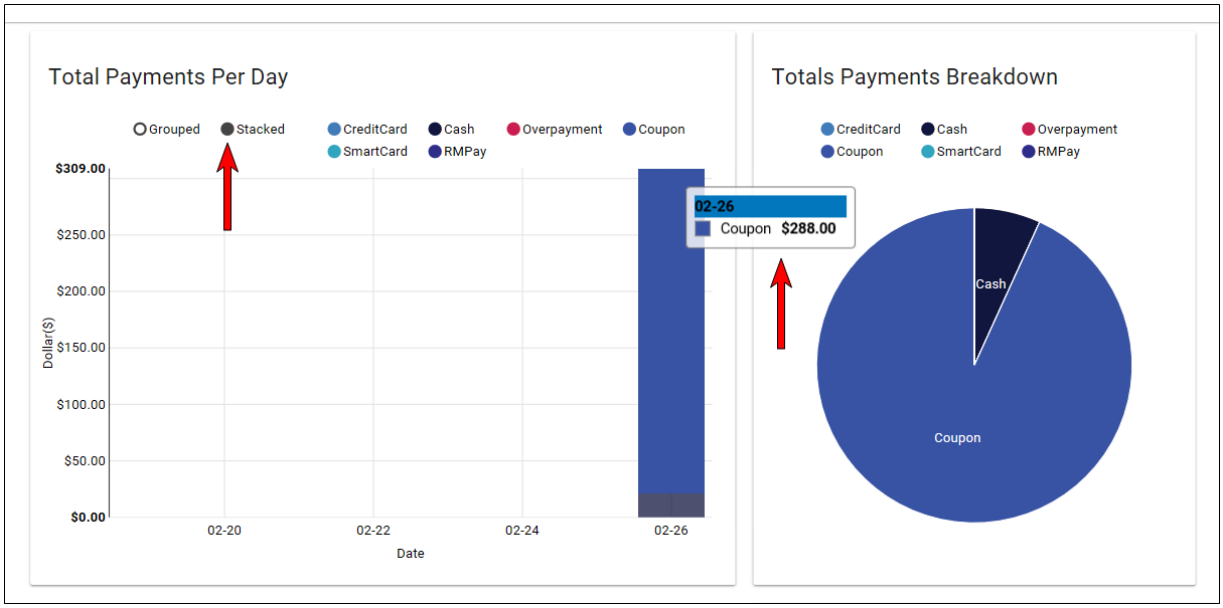
- Total Payments Per Day (one week period)
- Total Payments Breakdown (one week period)
- Message of the Day

Select between the **Grouped** or **Stacked** option under the **Total Payments Per Day** chart.

Grouped - The grouped option separates the total payments per day using a different bar for each payment type.



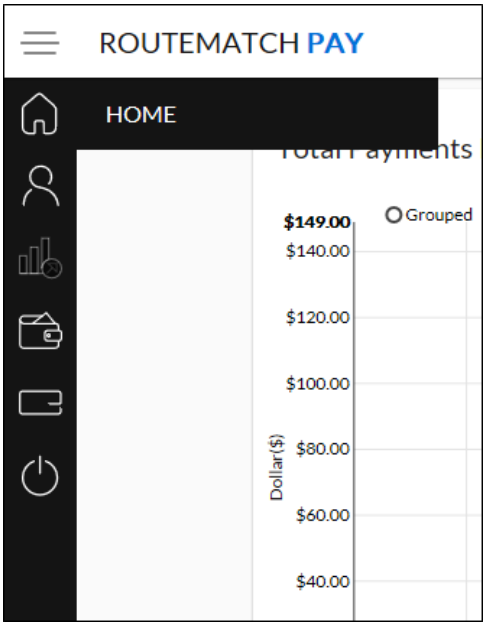
Stacked - The stacked option combines the total payments per day using one bar.



Note: Use the hover feature to view payment breakdown details.

Navigation Menu

On the left hand side of the page is the Demand Agency Web Portal navigation menu. Hover over the icons to view each menu option.



The navigation menu contains the following elements:

Home: Return to the Demand Agency Web Portal home page.

Customers: Access a searchable list of registered agency customers. Allows agency users to view information about customers and manage customer accounts and payment options.

Reports: Generate several types of payment reports.

Manage Refunds: Process customer refunds.

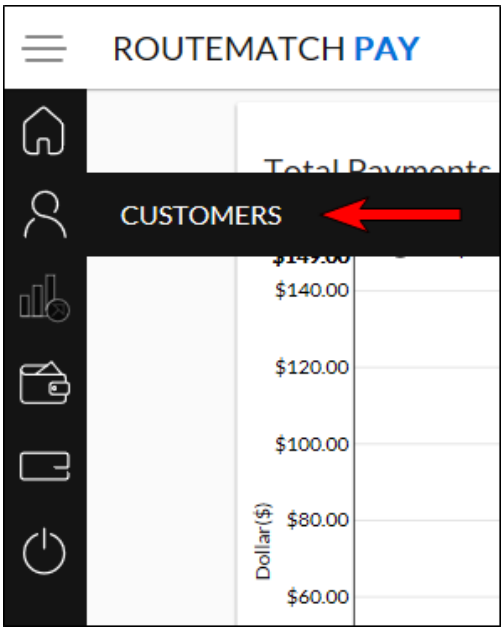
Manage Smartcards: Add or remove smart cards from system.

Settings: Configure Demand Agency Web Portal settings.

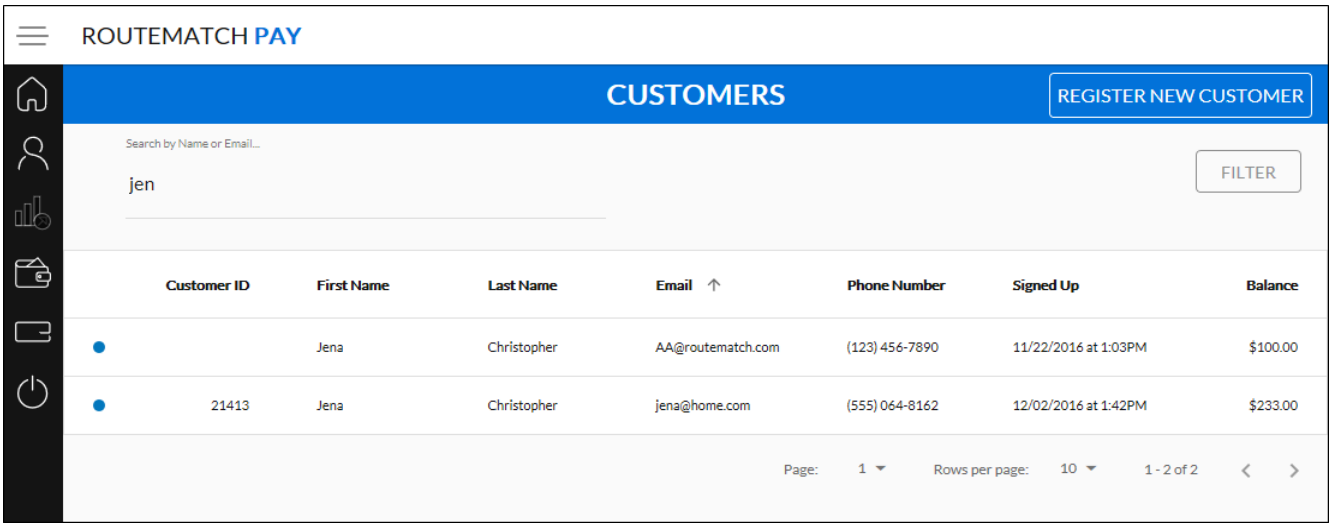
Logout: Exit the Demand Agency Web Portal.

Managing Customers in the Pay Demand Agency Web Portal

The **Customer** button on the navigation menu allows an agency user to access information about and manage customers.

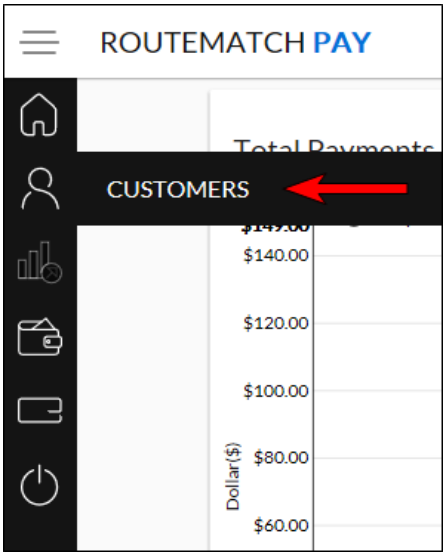


When the user clicks on the **Customer** button, a list of the agency's registered customers will display. The list can be arranged by the fields in the image below.



Searching for Customers

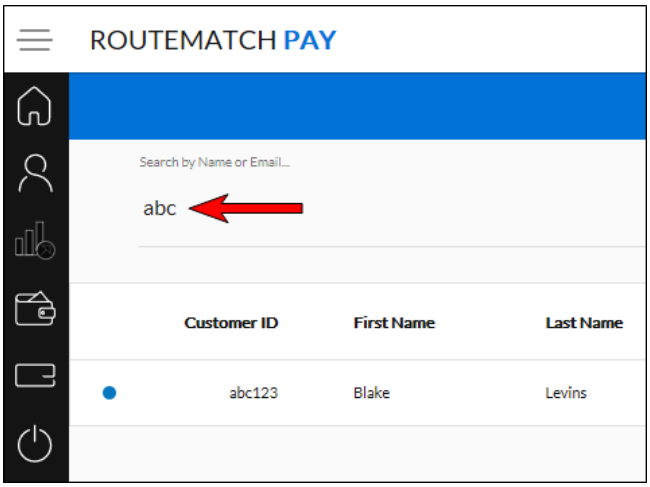
1. Click on the **Customer** page from the Demand Agency Web Portal navigation menu.



2. The page will display a list of the agency's registered customers. There are then two ways to search for customers:
   a. Click a customer's name from the list to view their account.

	Customer ID	First Name	Last Name	Email	Phone Number	Signed Up	Balance
		Jena	Christopher	AA@routematch.com	(123) 456-7890	11/22/2016 at 1:03PM	$100.00
	21413	Jena	Christopher	jena@home.com	(555) 064-8162	12/02/2016 at 1:42PM	$233.00

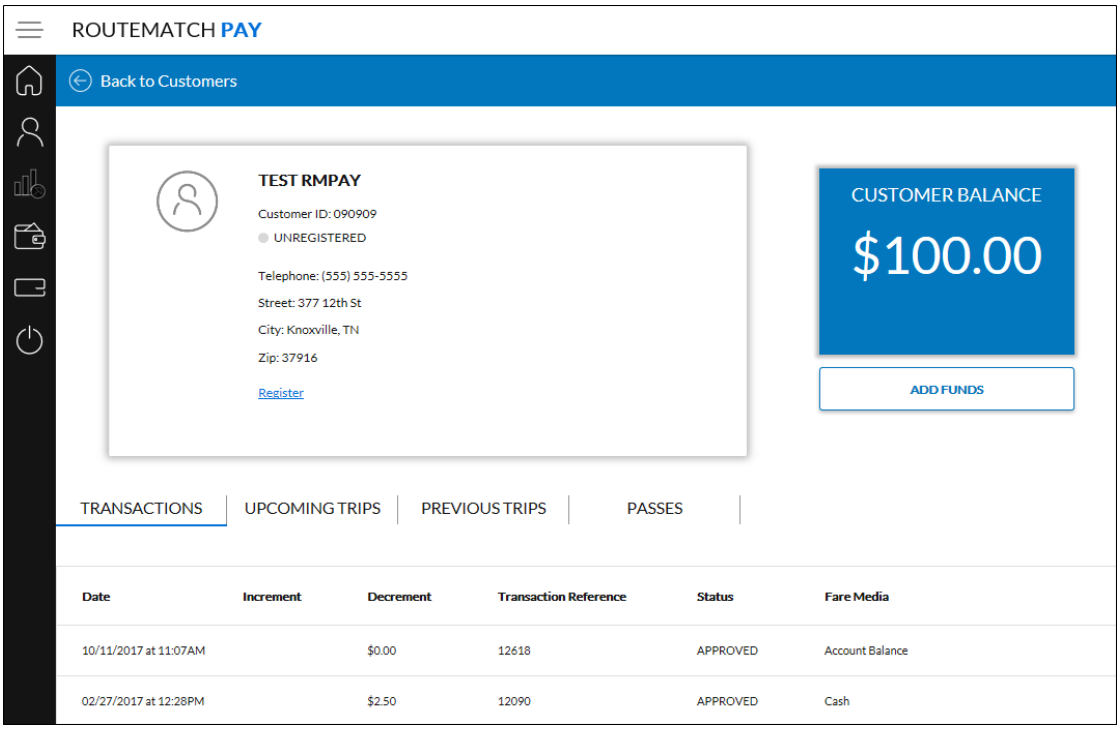
b. Enter a search term in the field above the customer list. The filter allows you to search for customers by email, customer ID, first or last name, or telephone number.



Viewing Customer Information

To access information and management options for a specific customer, click on a customer you have identified on the **Customer** page from the navigation menu. See Searching for Customers for instructions.

The customer management page will then display. This page displays the customer's profile picture (should they choose to upload one), address, and contact information.



You can view the following additional information about a customer:

- **Transactions**(displays detailed information regarding payments and transactions)
- **Upcoming Trips**
- **Previous Trips**
- **Refund History**
- **Passes**
- **Smartcards** (displays detailed information on the status and history of the customer's smart cards)

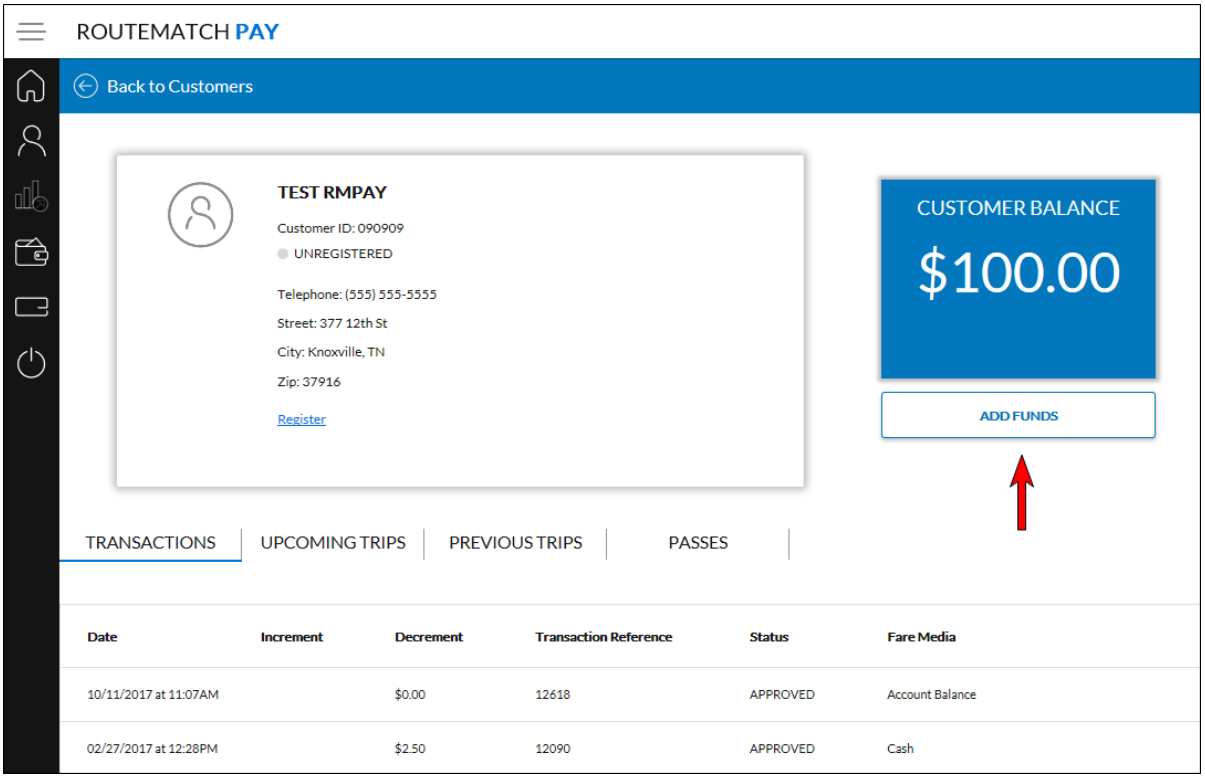
Adding Funds to a Rider's Account

Agency users can add funds to a rider's account using cash or check using the Pay Agency Web Portal.

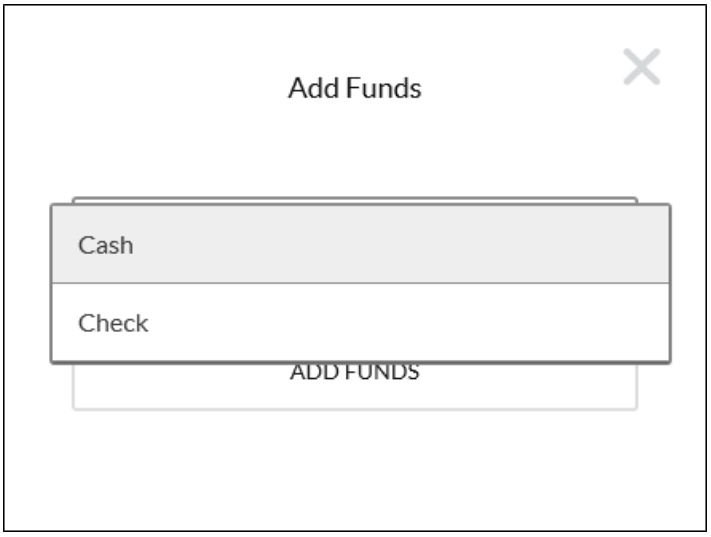
> **Note:** The cash and check feature is disabled by default. A Routematch deploy team member will facilitate the configurations of the cash and check feature if your agency is interested in enabling this feature.

To add funds to a rider's account:

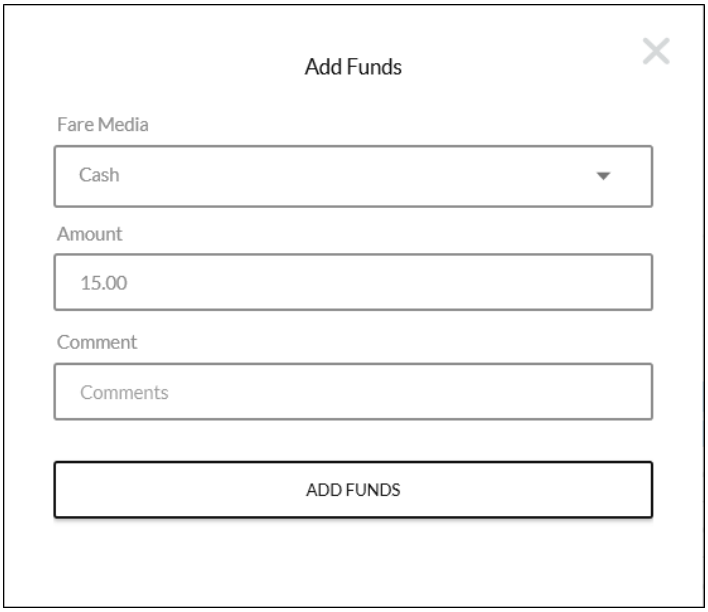
1. Log into the Pay Agency Portal and search for a customer.
2. Click the **Add Funds** button.



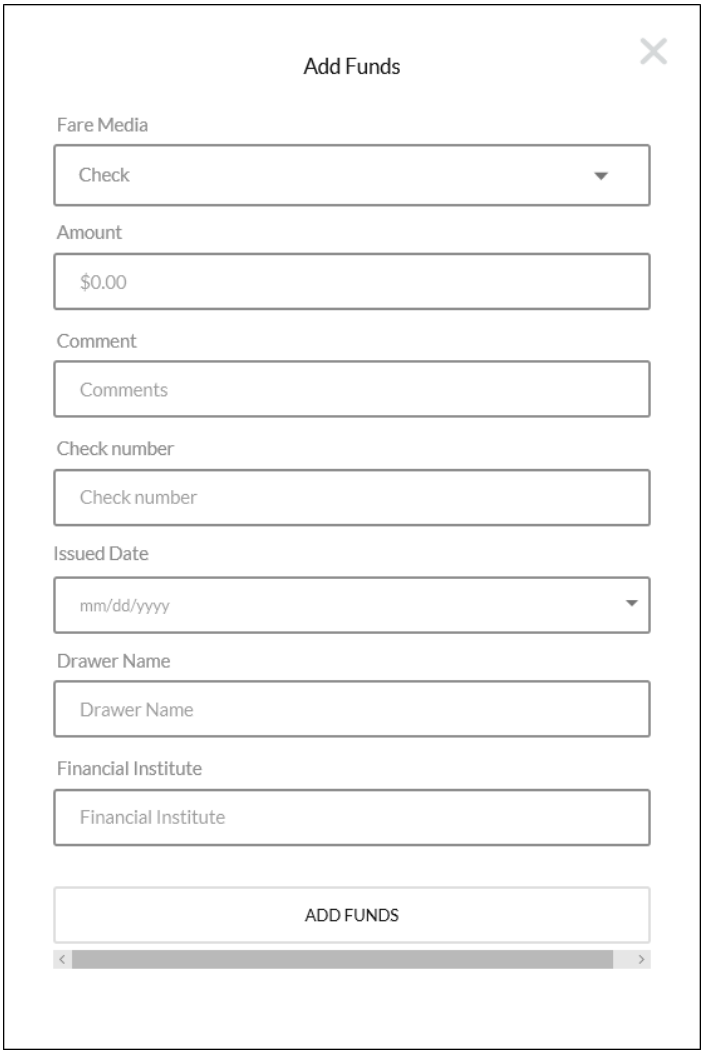
3. Select either cash or credit card from the drop-down list.



4. [**If you select the Cash option**] Enter the cash amount.



5. [**If you select the Check option**] Enter the check details.



6. Click **Add Funds**. The customer balance will automatically be updated.

Purchasing a Monthly Pass on Behalf of a Rider

Agency users can purchase a monthly pass on behalf of a rider using the Pay Agency Web Portal. This process can be completed using the rider's Pay Account Balance, or by adding funds to their account using cash or check.

Riders can only purchase one monthly pass per transaction. If the rider wants to purchase more than one pass, the process must be completed multiple times.

If the rider has sufficient funds in their Pay account balance, the cost of the pass will be deducted. If the rider has insufficient funds in their Pay account balance, a message will display stating the rider needs to add funds to their account prior to making a purchase.

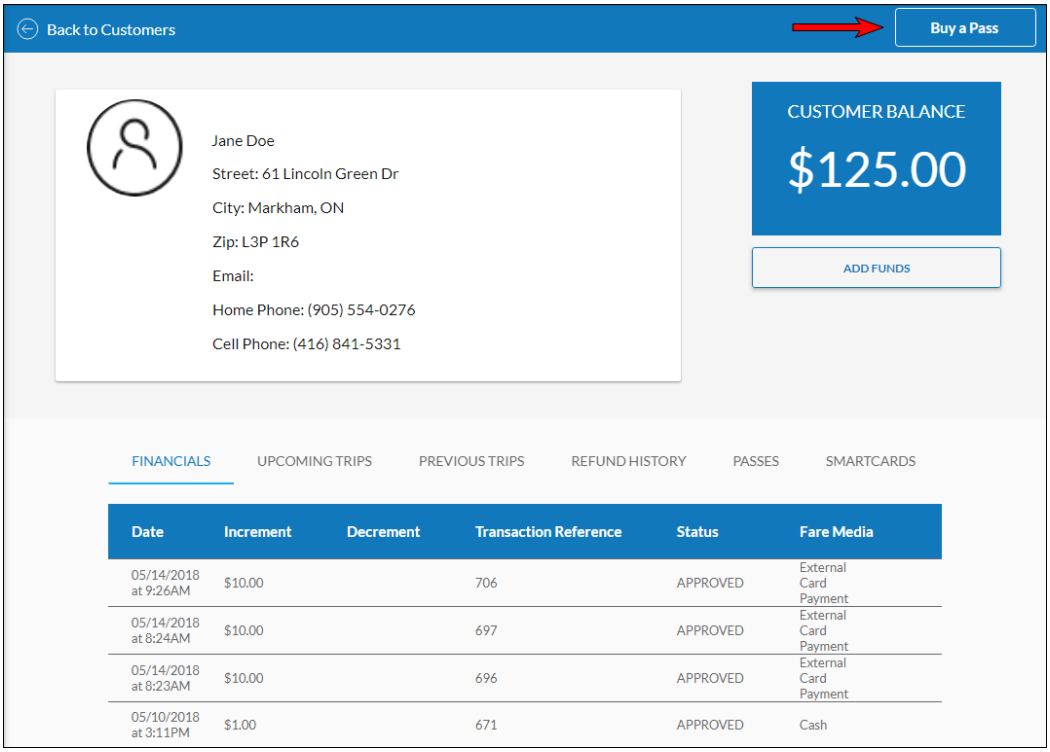
Configuration

A member from the Routematch deploy team will facilitate the configurations of the monthly passes your agency wants to allow riders to purchase. The calendar monthly passes and will be effective from the start of the month to the end of the month. The agency needs to work with the Routematch deploy team and define the following:

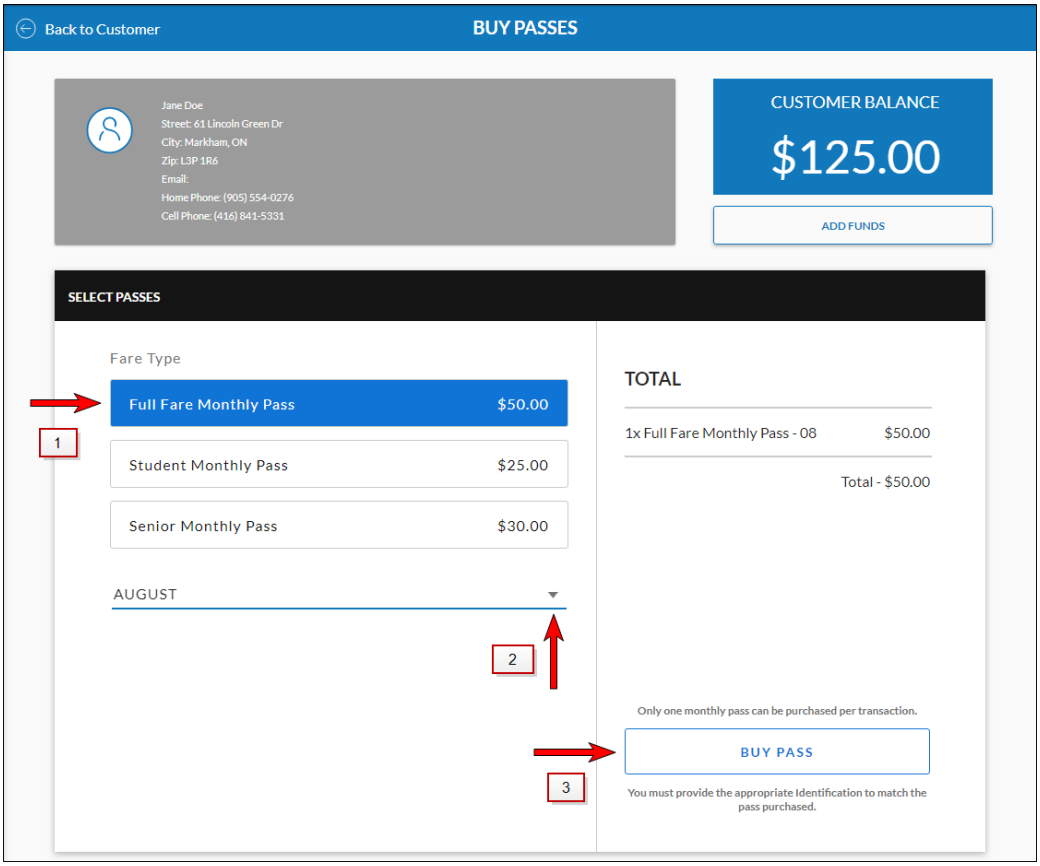
- **Pass Name**
- **Cost**
- **Rider Type (Adult, Senior, Student, etc.)**
- **Effective Dates**

To purchase a monthly pass on behalf of a rider:

1. Log in to the Pay Agency Portal and search for a customer.
2. Click **Buy a Pass**.



3. Select a **Fare Type** from the available options that display.

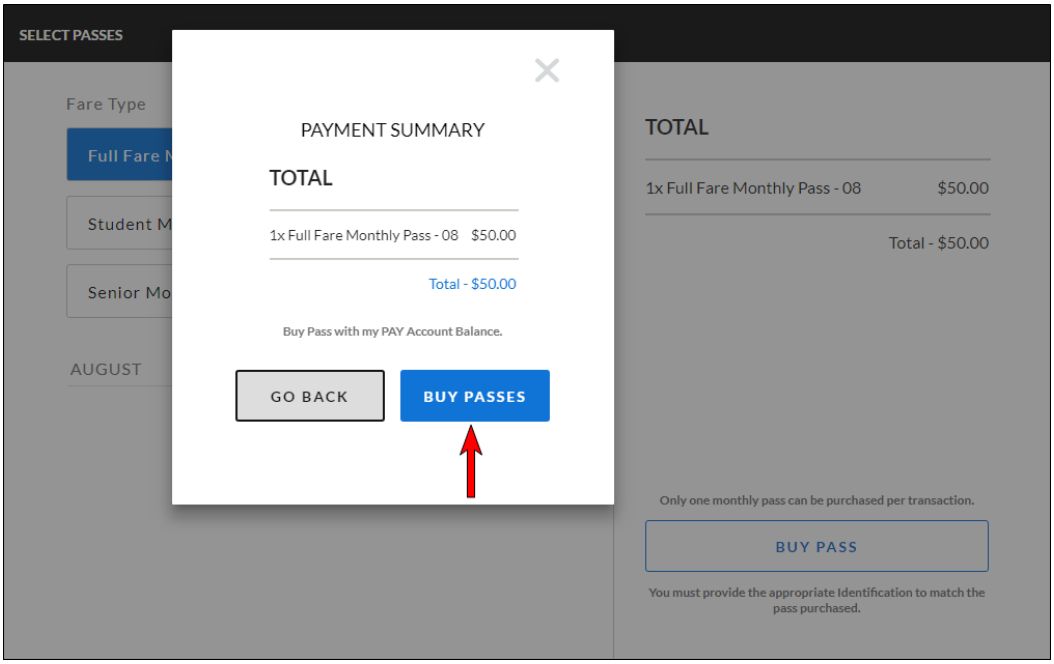


- **Full Fare Monthly Pass**
- **Student Monthly Pass**
- **Senior Monthly Pass**

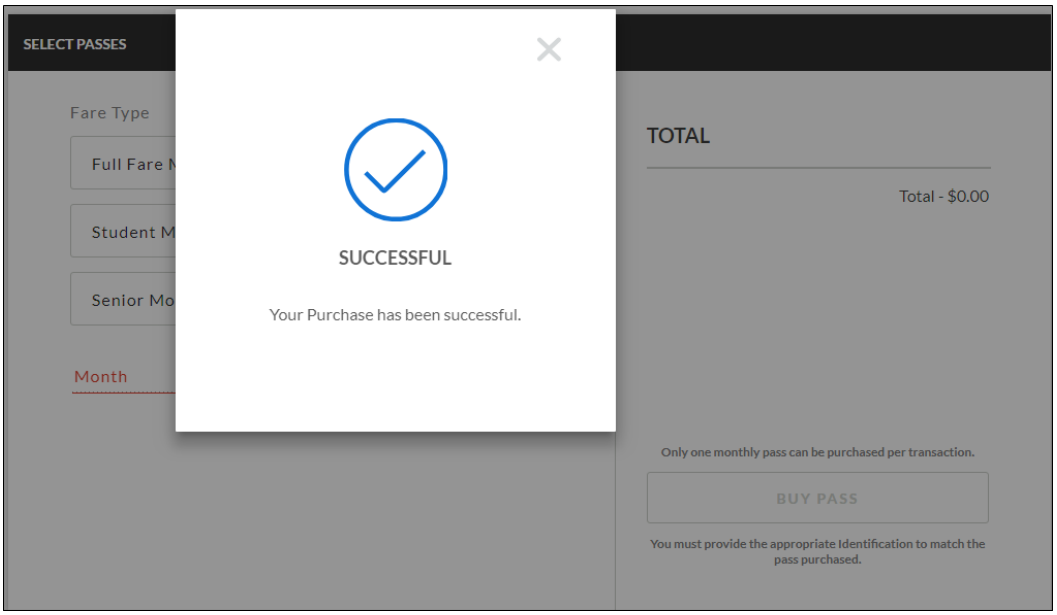
4. Select the month using the drop-down menu.

> **Note:** A monthly pass is valid for unlimited rides for the entire calendar month and will expire at the end of the month.

5. Click **Buy Pass**.
6. Click **Buy Passes** when the **Payment Summary** dialog displays.



7. A payment success message will display when the transaction is complete.



8. The transaction will be recorded and displayed in the **Financials** tab.

FINANCIALS | UPCOMING TRIPS | PREVIOUS TRIPS | REFUND HISTORY | PASSES | SMARTCARDS

Date	Increment	Decrement	Transaction Reference	Status	Fare Media
05/14/2018 at 3:05PM		$50.00	707	APPROVED	RMPay
05/14/2018 at 9:26AM	$10.00		706	APPROVED	External Card Payment
05/14/2018 at 8:24AM	$10.00		697	APPROVED	External Card Payment

9. The transaction will also be recorded and displayed in the My Transactions tab of the RMPay Rider WebPortal.

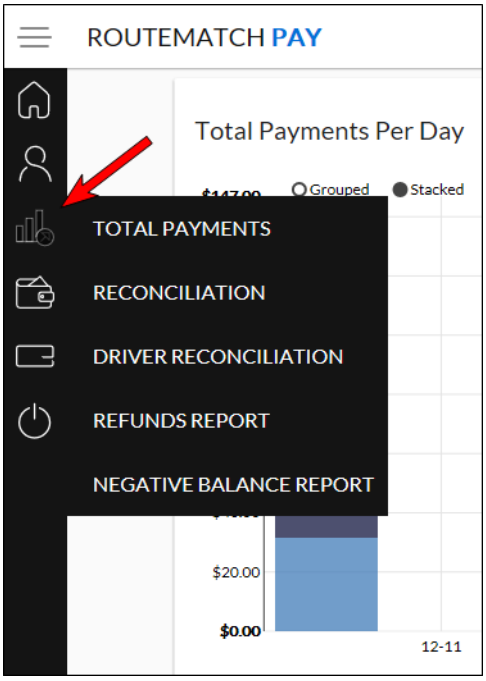
MY TRANSACTIONS | REFUND HISTORY | PASSES

Transaction Date	Increment	Decrement	Transaction Reference	Status	Fare Media
05/16/2018 at 1:36PM		$50.00	737	APPROVED	RMPay
05/14/2018 at 3:05PM		$50.00	707	APPROVED	RMPay

Generating Reports in the Pay Demand Agency Web Portal

The **Reports** button allows the user to access detailed financial information about an agency's transit activities. To generate a report:

1. Click on the **Reports** button on the navigation menu. A menu will display that allows you to select one of several types of reports.



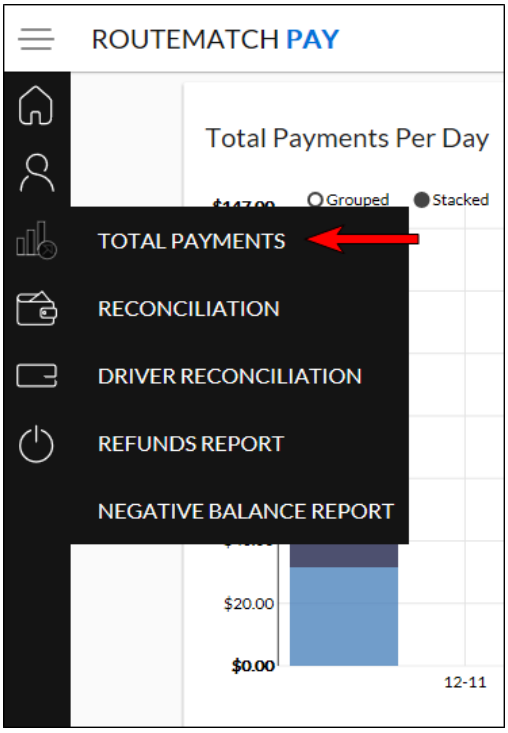
   - Total Payments
   - Reconciliation
   - Driver Reconciliation
   - Refunds Report
   - Negative Balance Report

2. Click on your desired report type from the menu.

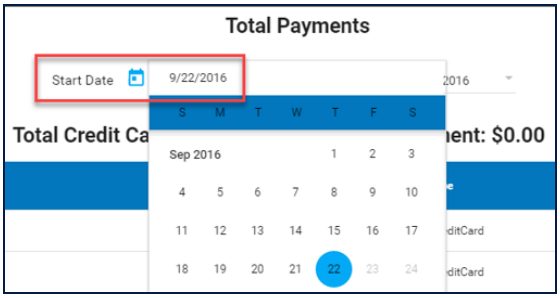
Generating a Total Payments Report

The Total Payments Report shows all credit card and cash transactions made by customers. This includes Total Cash, Total Credit Card, Total Over Payment, and Net Total details. To view the report:

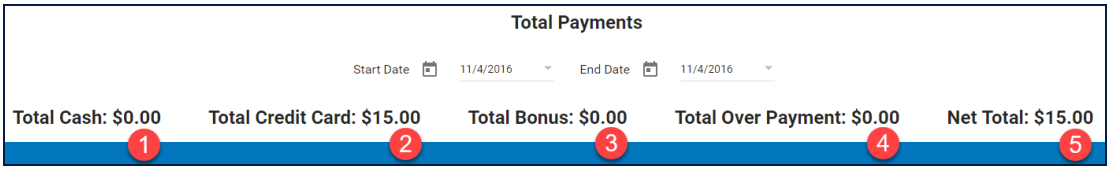
1. Click on the **Reports** button from the Demand Agency Web Portal navigation menu. A drop-down menu will appear. See Generating Reports for instructions.
2. Click the **Total Payments** button from the drop-down menu.



3. Use the calendar options at the top of the page to select a date range for the report. All relevant transactions will then display. Transactions for the current date are shown by default.



The Total Payments Report page summarizes the transactions as follows:



1. Total Cash: the total dollar amount at which customers increased their account balance. Cash amounts are approved automatically and updated instantly. This amount does not list the total amount collected from customers. The total amount collected for both account top-ups and fares for rides is listed in the Net Total Column.
2. Total Credit Card: the total amount of money collected from customers by credit card, for an account top-up. Once the funds are approved by the payment service provider, they appear in this report. If a top-up is declined, it will not appear in this report.
3. Total Bonus: the total amount of bonus funds added to rider accounts. An agency may opt to offer riders a bonus for registering a smart card, for example.
4. Total Over Payment: the total dollar amount that customers paid in excess of their fare amount. For example, if a ride costs $8, but a customer only has a $10 bill, the change (or excess) of $2 is credited to the Rider's account.
5. Net Total: the overall total for customer payments during the selected date range.

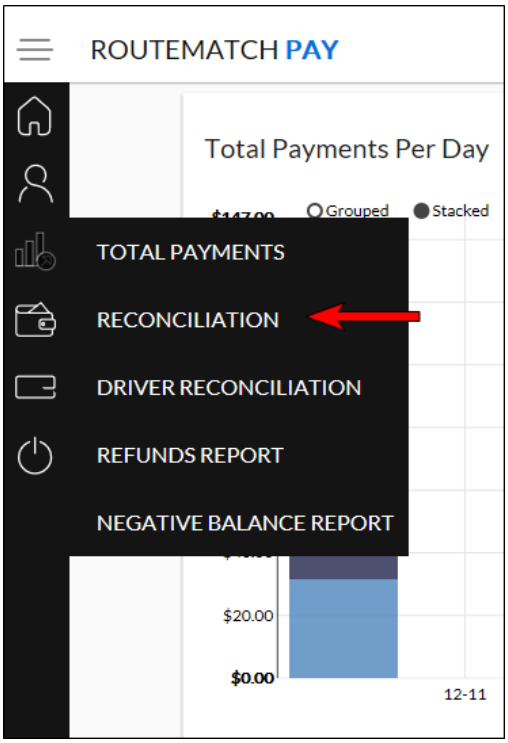
Below the report summary, you can find information for each individual transaction.

Date ↑	Customer ID	Type	Amount
09/22/2016 at 5:47AM	28	CreditCard	$12.00
09/22/2016 at 5:47AM	28	CreditCard	$10.00

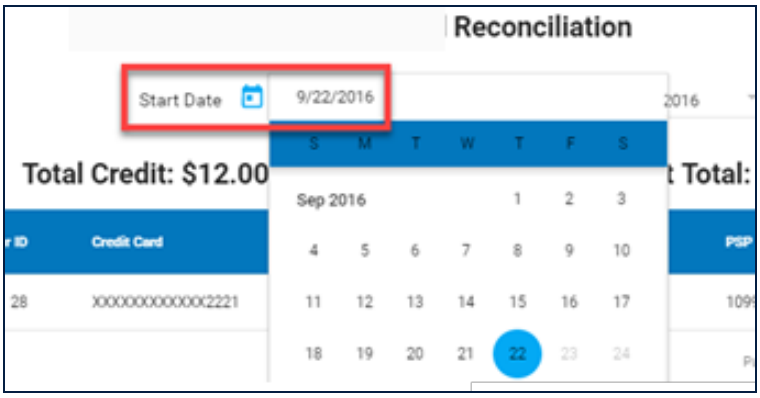
Generating a Reconciliation Report

The Reconciliation Report shows all credit card or debit card refunds and transactions where funds were added. To view the report:

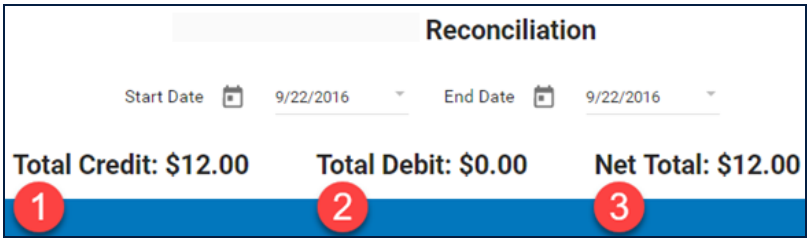
1. Click on the **Reports** button from the Demand Agency Web Portal navigation menu. See Generating Reports for instructions.
2. Click the **Reconciliation** button from the drop-down menu.



3. Use the calendar options at the top of the page to select a date range for the report. All relevant transactions will then appear. Transactions for the current date are shown by default.



4. The Reconciliation Report summarizes the transactions as follows:



1. Total Credit: the total amount of funds added to Pay through customer credit cards.
2. Total Debit: the total amount of refunds to customer credit cards.
3. Net Total: the total amount of funds added to Pay through rider credit cards, minus refunds to customers.

Below the report summary, you can find information for each individual transaction. Each transaction in the report details the following information: Pay Invoice #, PSP (Payment Service Provider) Reference #, Authorization #, and Amount. This information is used to reconcile payments into an agency's merchant account.

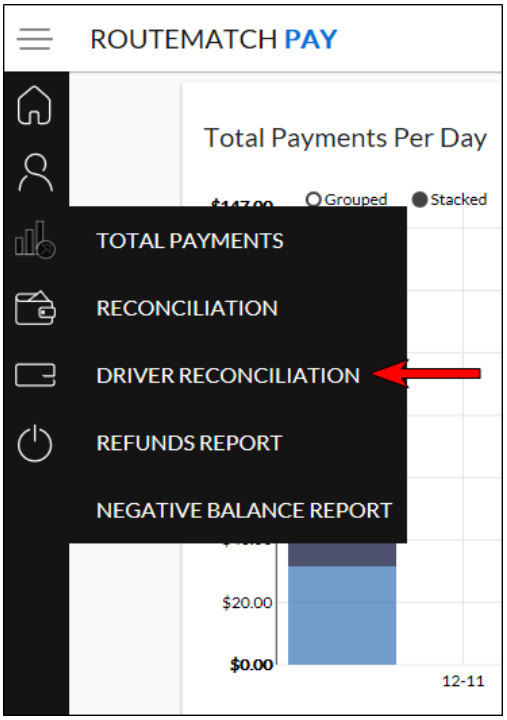
Date ↑	Customer ID	Credit Card	RMPay Invoice #	PSP Reference	Authorisation #	Amount
09/22/2016 at 5:47AM	28	XXXXXXXXXXXX2221	7fd15b65-6072-46c1-9b97-6664bcf02b62	109928064	473731	$12.00

Note: Newly added funds and refunds appear only when approved by the payment service provider. Failed/declined funds do not show.

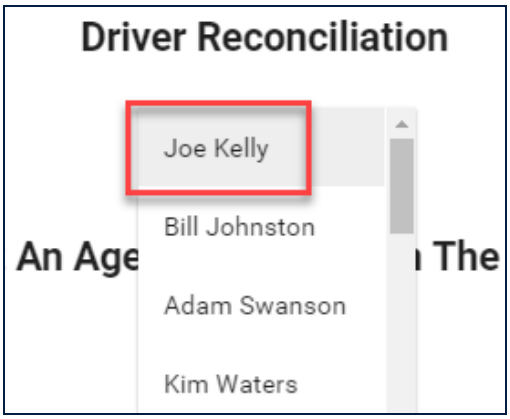
Generating a Driver Reconciliation Report

The Driver Reconciliation Report shows the fare payment amounts which a driver has processed for a particular day. The report can show driver information for the past 30 days. To view the report:

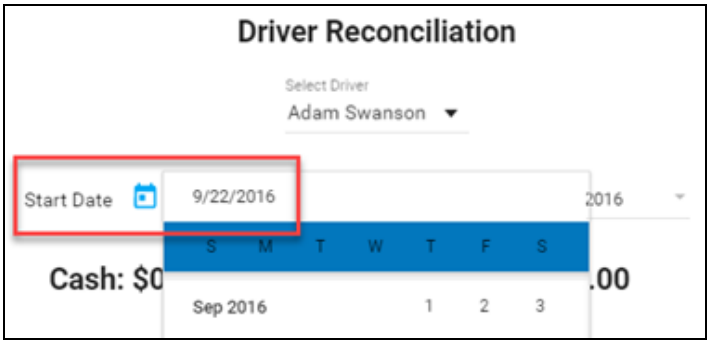
1. Click on the **Reports** button from the Demand Agency Web Portal navigation menu. See Generating Reports for instructions.
2. Click the **Driver Reconciliation** button from the drop-down menu.



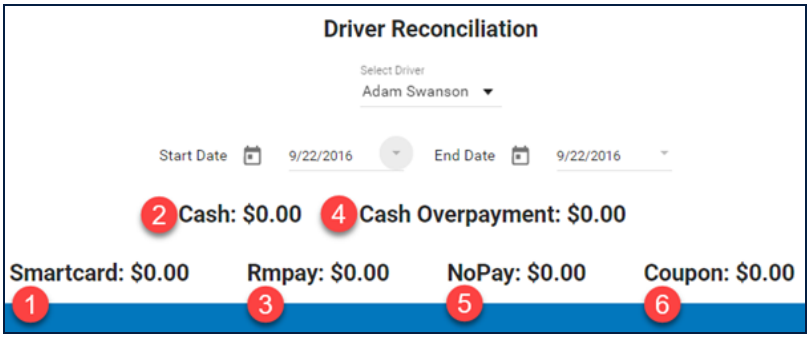
3. Select a Driver from the **Select Driver** drop-down list.



4. Using the calendar options at the top of the page, select a date range. Use the calendar options at the top of the page to select a date range for the report. All relevant transactions will then appear. Transactions for the current date are shown by default.



The Driver Reconciliation Report summarizes the transactions as follows:



1. Smartcard
2. Cash
3. Pay
4. Cash Overpayment
5. NoPay
6. Coupon

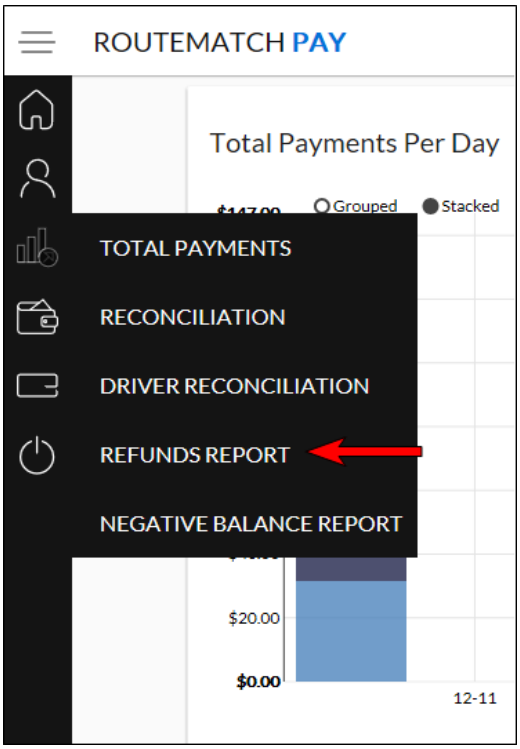
Below the report summary, you can find information for each individual transaction.

Date	Customer ID	Type	Amount
09/22/2016 at 5:47AM	28	CreditCard	$12.00
09/22/2016 at 5:47AM	28	CreditCard	$10.00

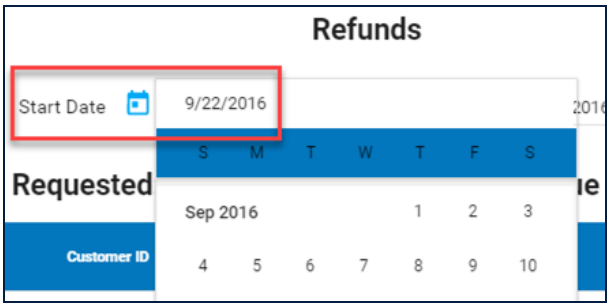
Generating a Refunds Report

The Refunds Report shows refund information. The Value Requested amount shows the total refund amount requested by a Rider, both approved and not approved. To view the report:

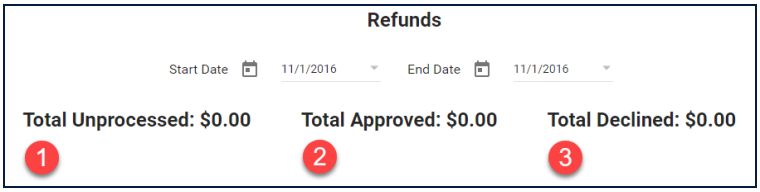
1. Click on the **Reports** button from the Demand Agency Web Portal navigation menu. See Generating Reports for instructions.
2. Click the **Refunds Report** button from the drop-down menu.



3. Using the calendar options at the top of the page, select a date range. Use the calendar options at the top of the page to select a date range for the report. All relevant transactions will then appear. Transactions for the current date are shown by default.



The Refunds Report summarizes the transactions as follows:



1. Total Unprocessed: the total dollar amount of all refunds requested.
2. Total Approved: the total dollar amount of all refunds approved by your agency.
3. Total Declined: the total dollar amount of all refunds declined by your agency.

Note: Only credit card refunds display at this time.

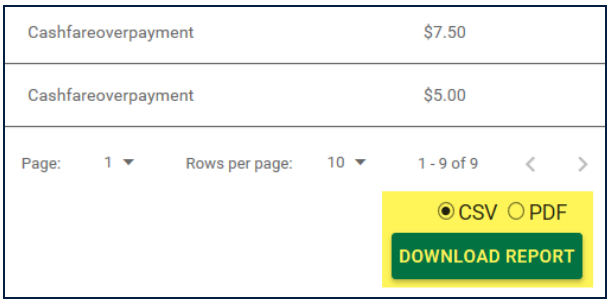
Below the report summary, you can find information for each individual transaction.

Requested Time	Updated Time	Customer ID	Status	Approved	Amount Requested	Amount Refunded
09/22/2016 at 5:51AM		4	created	false	$5.00	

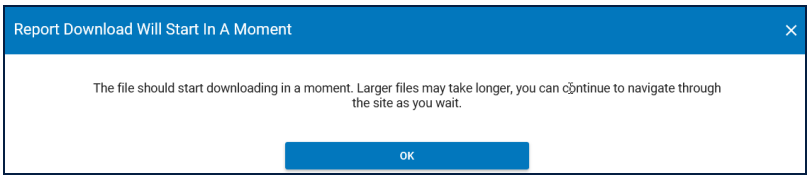
Downloading a Payments Report

Pay allows you to export payments reports in either **.csv** (Excel) or **.pdf** formats. To do this:

1. Generate your chosen report. (See also Generating Reports.)
2. Select .csv or .pdf format and click Download Report in the bottom right-hand corner of the screen.



3. Your report will download shortly. Click OK to continue using Pay.

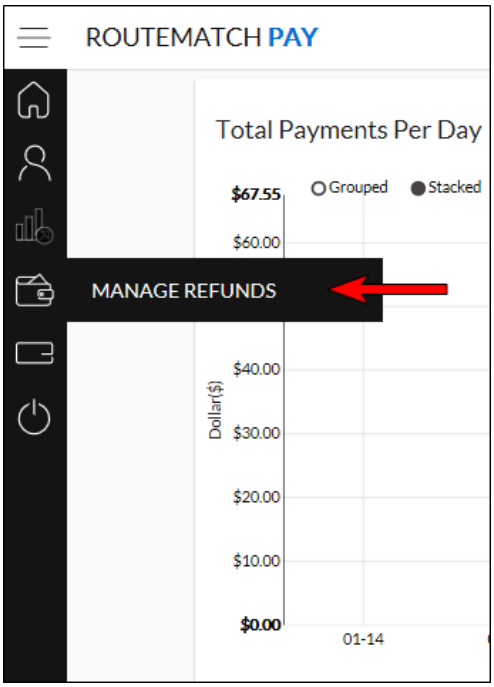


Managing Refunds

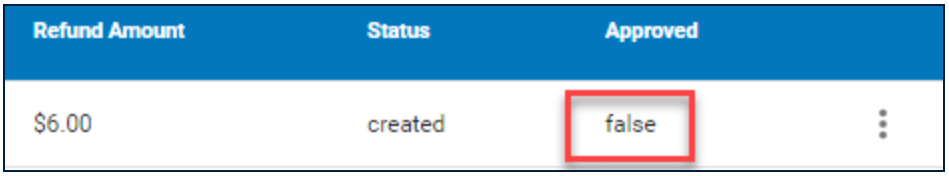
An agency user can accept or decline individual customer refunds by clicking the **Manage Refunds** button in the Demand Agency Web Portal navigation menu.

How to Approve or Decline a Customer Refund

1. Click on the **Manage Refunds** button in the Demand Agency Web Portal navigation menu.

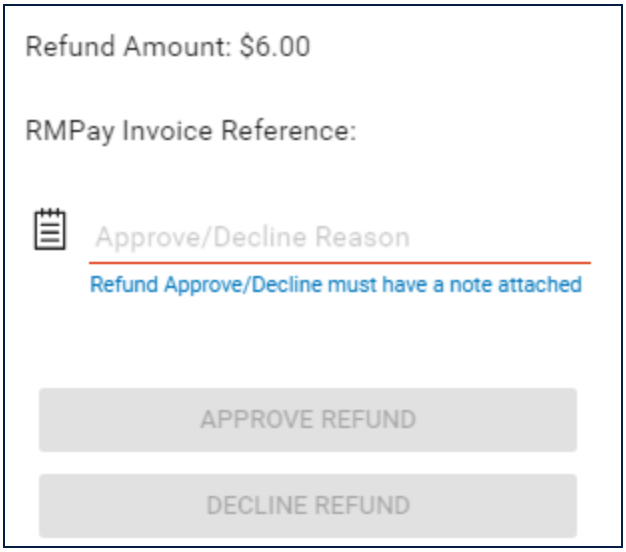


2. Select a transaction to refund. Transactions that have not yet been approved are listed as "false."

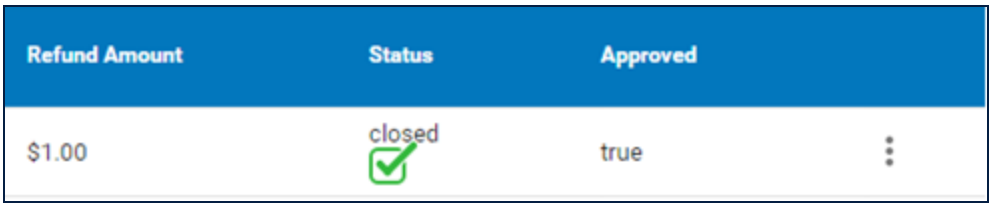


Refund Amount	Status	Approved	
$6.00	created	false	⋮

3. Select the three dots to Approve or Decline Refund. 
4. Enter a reason for the approval or denial.



5. Click **Approve Refund** or **Decline Refund**. Approved refunds appear with a green check mark.

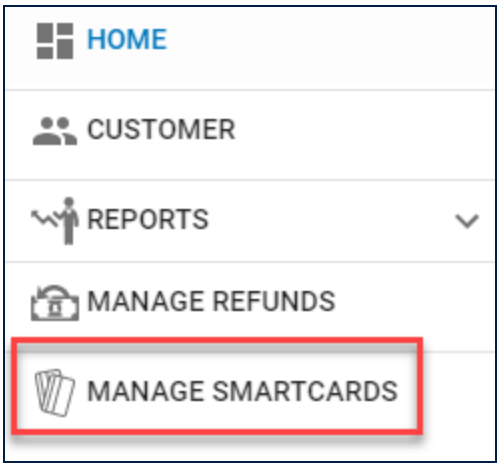


Refund Amount	Status	Approved	
$1.00	closed	true	

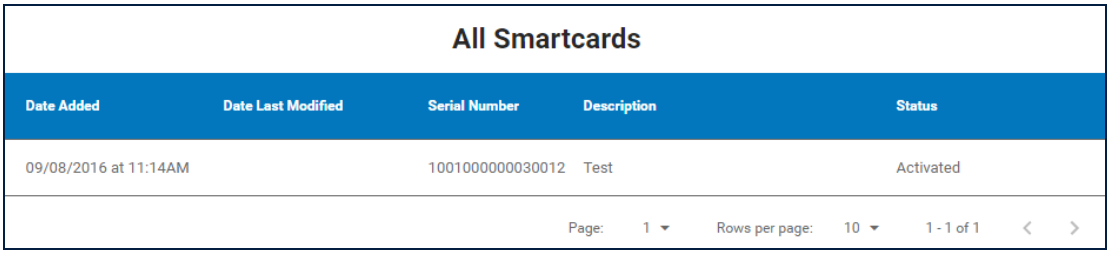
Managing Smartcards

The Manage Smartcards section allows admins to review and track registered smart cards. To access the Manage Smartcards page:

Click on the **Manage Smartcards** button in the Demand Agency Web Portal navigation menu.



A list of all registered smart cards will appear. Tracking information includes date added, serial number, description, and status (activated or suspended).



All Smartcards

Date Added	Date Last Modified	Serial Number	Description	Status
09/08/2016 at 11:14AM		1001000000030012	Test	Activated

Page: 1 Rows per page: 10 1 - 1 of 1

Settings

The Settings button allows an agency to create administrative settings for Pay. Settings might include establishing permissions for other administrative users. Descriptions of settings and instructions on how to use these features will come in a future version of the Pay User Guide.

CHAPTER 3

Pay Fixed Agency Web Portal

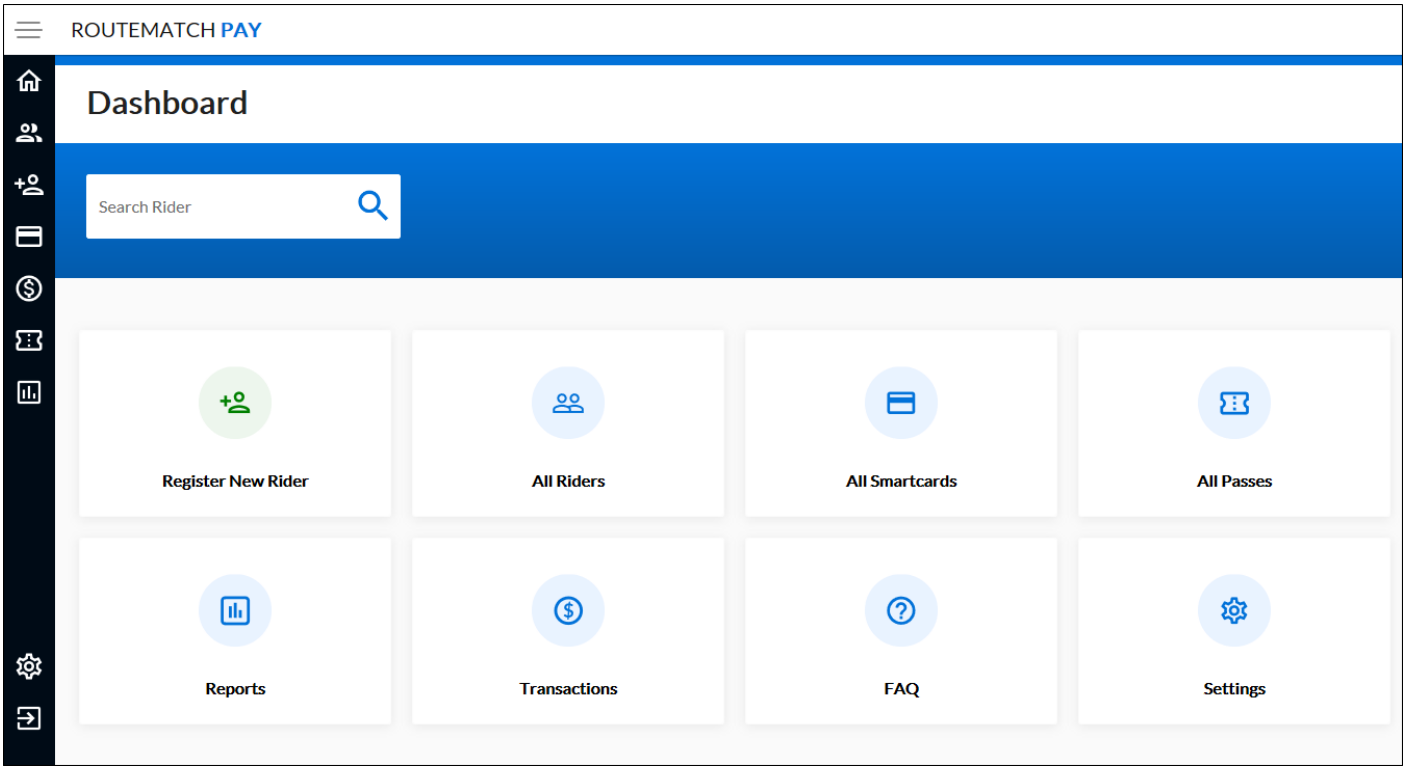
The Pay Fixed Agency Web Portal allows an agency user to access customer information and control how riders use Pay. Agency users can review a rider's account, manage a rider's smart cards, and process rider refund requests. The Fixed Agency Web Portal also allows users to generate various payment reports. Administrators will use the Fixed Agency Web Portal to set access permissions for all other agency users.

This chapter discusses the following:

Routematch
MOBILITY WITHOUT LIMITS

Accessing the Pay Fixed Agency Web Portal

Users can access the Fixed Agency Web Portal through their web browsers (Internet Explorer, Firefox or Google Chrome) and devices that have a working connection to the internet. A user may access the Pay Fixed Agency Web Portal through a link or URL provided by your agency. Many agencies will commonly provide a link on their websites. Once users open the portal, they can place an icon directly on their desktops or create a bookmark in their internet browsers for easy access.

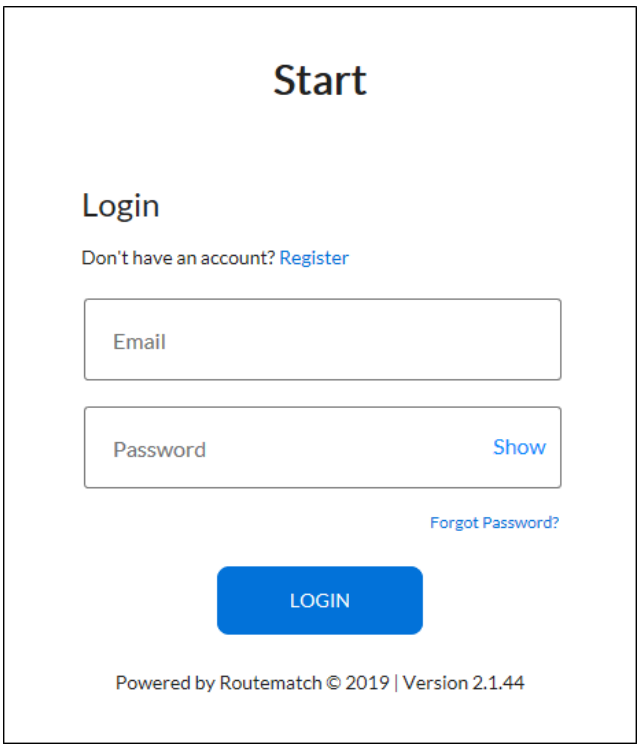


Logging In to the Pay Fixed Agency Web Portal

Agency users access the Fixed Agency Web Portal through the same login page as riders. To log in to the Fixed Agency Web Portal, complete these steps:

1. Enter your agency user name and password.

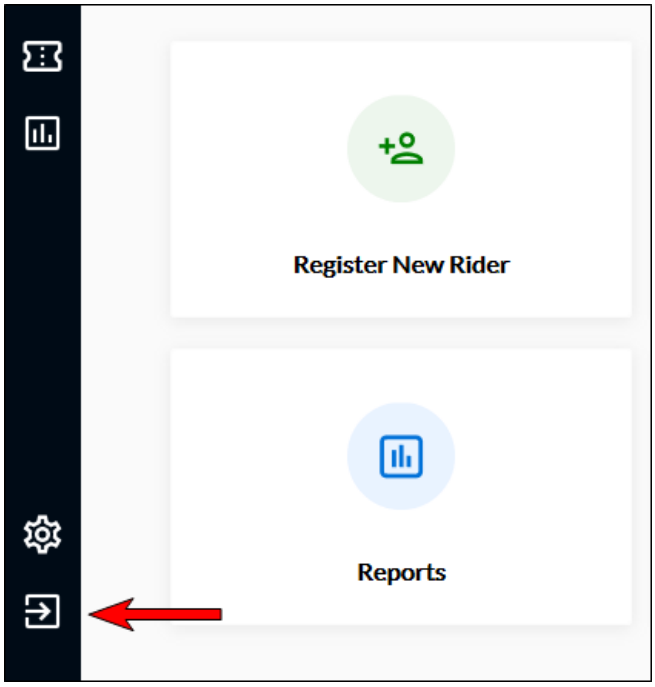
> **Note:** During the initial deployment of Pay, Routematch will provide the agency with login credentials for Fixed Agency Web Portal users. Later, agency staff can grant agency users various levels of access through Pay itself.



2. Click the **Login** button. This will take you to the Fixed Agency Web Portal home page.

Logging Out of the Pay Fixed Agency Web Portal

To log out of the system, simply click the **Logout** button at the bottom of the Fixed Agency Web Portal navigation menu. This is important for security and tracking admin work in the system.


Register New Rider
Reports

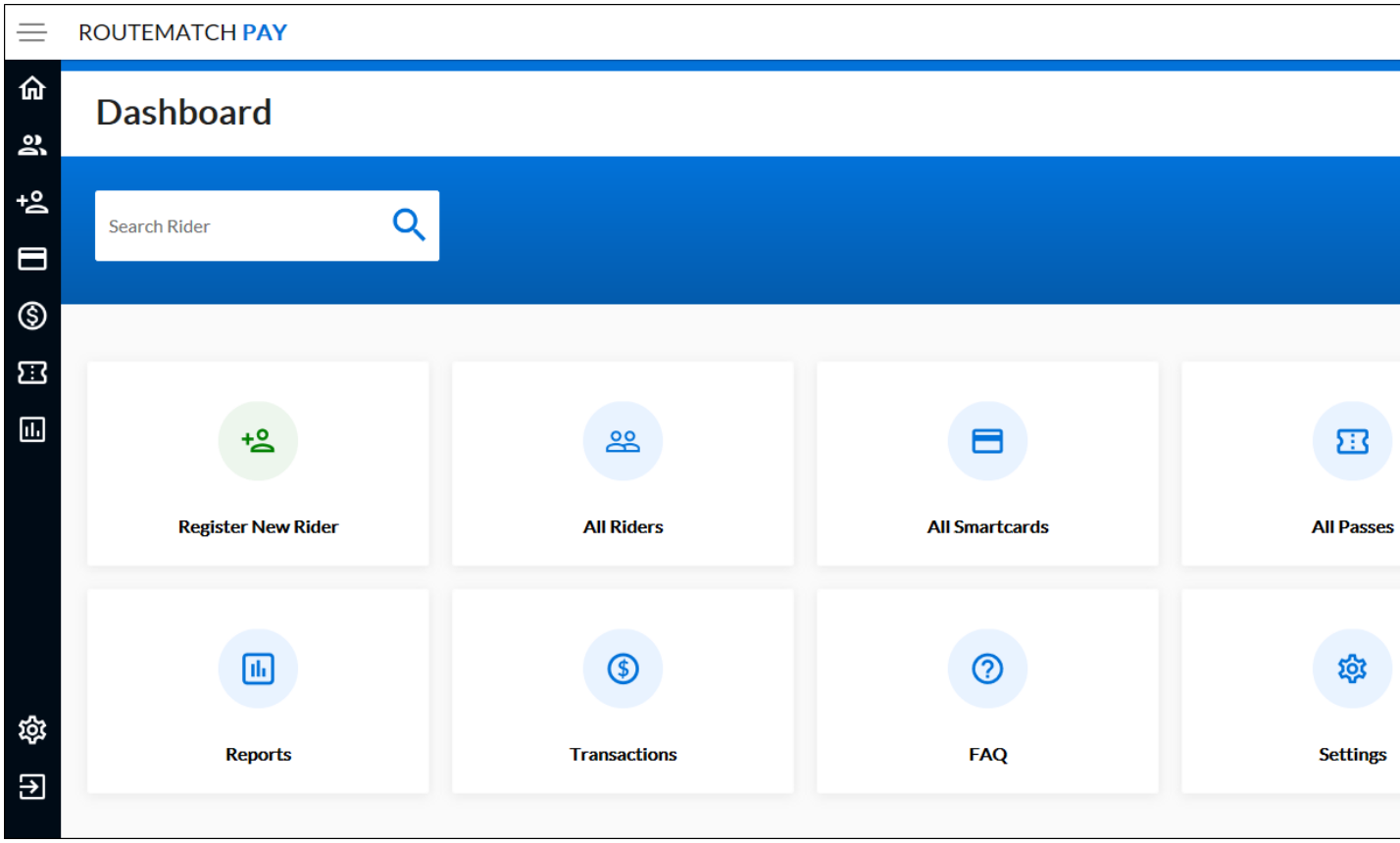
Pay Fixed Agency Web Portal Home Page

The Fixed Agency Web Portal home page displays the dashboard. The Dashboard allows you to register new riders, view all transactions, generate reports, etc. Options available to you depend on your agency's licensing and your installed products.

Pay Fixed Agency Web Portal Dashboard

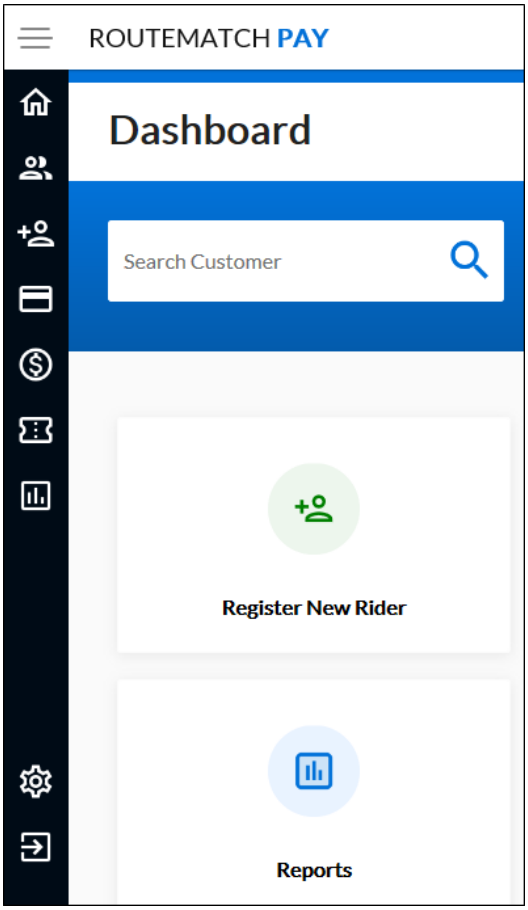
The Fixed Agency Web Portal home page features the agency dashboard that displays several categories of information. By default, the following overview metrics are shown:

- Register New Rider
- Customers
- All Smartcards
- All Passes
- Reports
- Transactions
- FAQ
- Settings



Navigation Menu

On the left hand side of the page is the Fixed Agency Web Portal navigation menu. Click each icon to view each menu option.



The navigation menu contains the following elements:

Dashbaord: Return to the Fixed Agency Web Portal home page.

All Riders: Access a searchable list of registered agency customers. Allows agency users to view information about customers and manage customer accounts and payment options.

Register New Customer: Register a new customer.

All Smartcards: Add or remove smart cards from system.

All Transactions: View all transactions.

All Passes: View all passes.

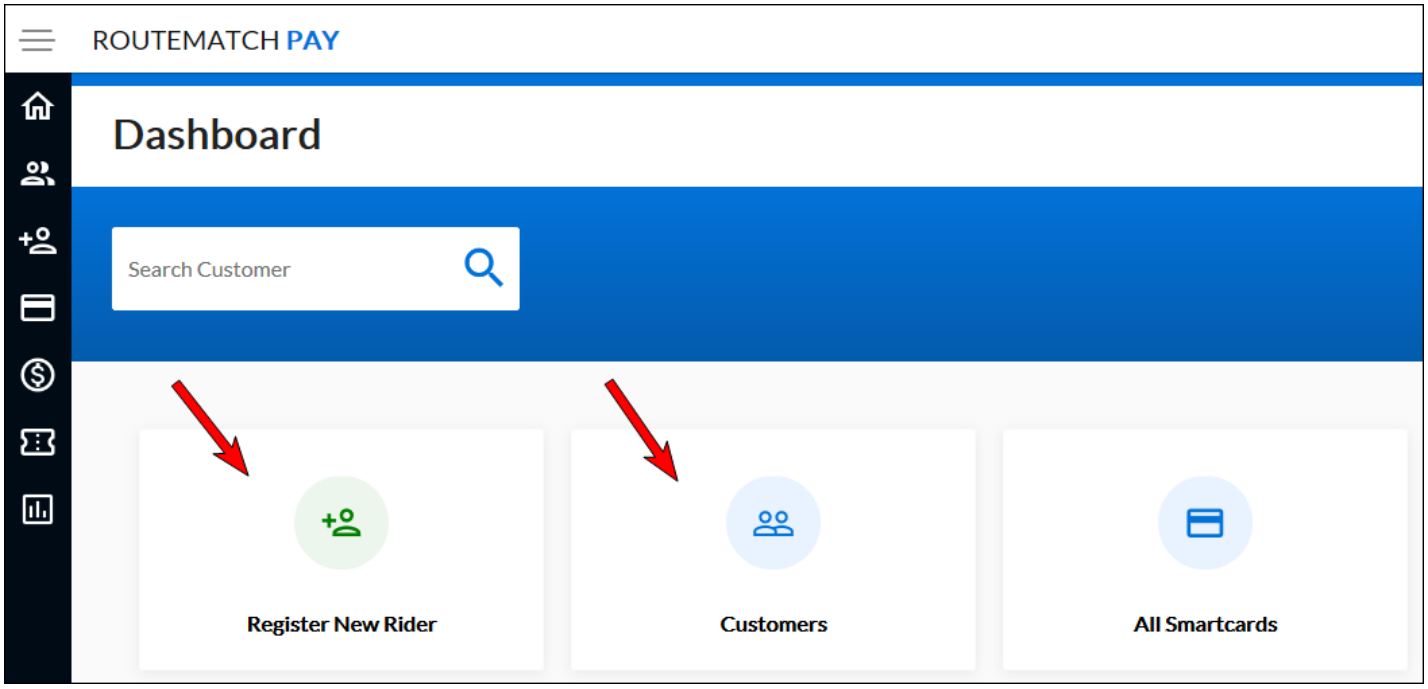
Generate Report: Generate several types of payment reports.

Settings: Configure Fixed Agency Web Portal settings.

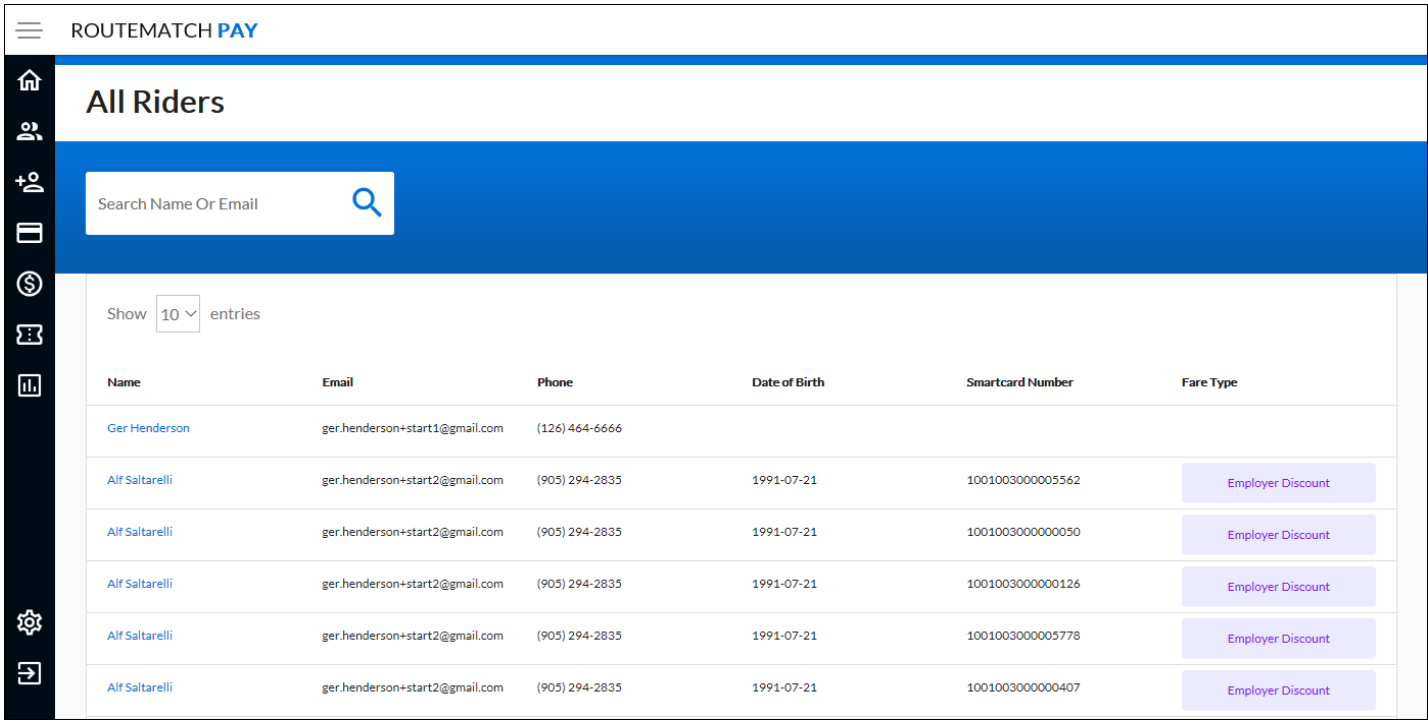
Logout: Exit the Fixed Agency Web Portal.

Managing Customers in the Pay Fixed Agency Web Portal

The **Register New Rider** button on the navigation menu allows an agency user to register a new rider. The **Customers** button allows an agency user to access information about and manage customers.

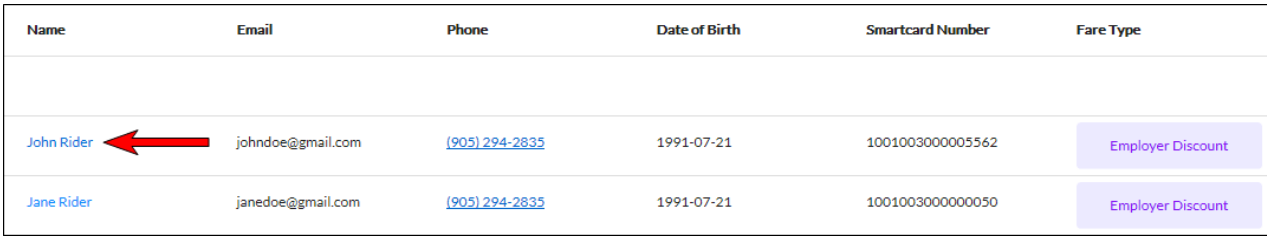


When the user clicks on the **Customers** button, a list of the agency's registered customers will display.



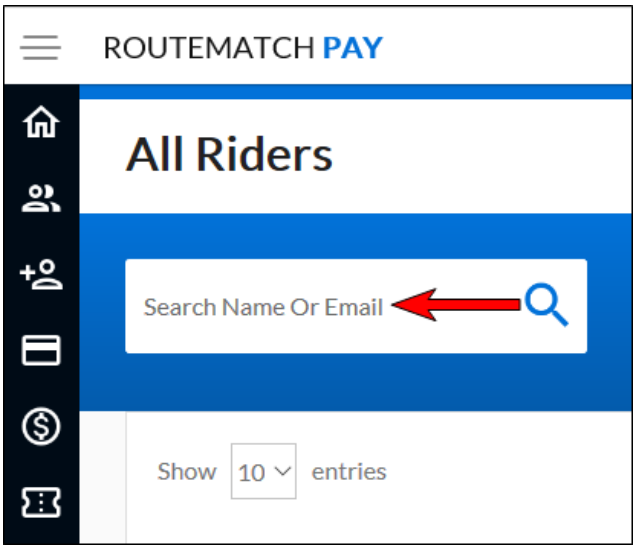
Searching for Customers

1. Click on the **Customers** page from the Pay Dashboard.
2. The page will display a list of the agency's registered customers. There are then two ways to search for customers:
   a. Click a customer's name from the list to view their account.



   b. Enter a search term in the field above the customer list. The filter allows you to search for customers by email, customer ID, first or last name, or telephone

number.


ROUTEMATCH PAY
All Riders
Search Name Or Email
Show
10
entries

CHAPTER 4

Mobile Ticketing

Mobile Ticketing gives riders the ability to purchase a ticket using their smartphone (iOS and Android). The ticket is then stored on a rider's phone. The rider can show the driver the ticket on the phone itself, and the driver will be able to verify visually that the ticket is valid.

In addition, Mobile Ticketing allows riders to create an account, save payment information, view their stored tickets, and plan a trip using an itinerary planner. Riders can also enter information about their mobility type and service eligibility.

This chapter discusses the following:

Routematch
MOBILITY WITHOUT LIMITS

Accessing Mobile Ticketing

You can download Mobile Ticketing for Android from Google Play, or for iPhone from the Mac App Store. Your agency may also make the app available on its website.

Once you have downloaded and installed Mobile Ticketing, tap the icon on your mobile phone to open it.

Downloading Mobile Ticketing from the Google Play Store

Riders download the free Mobile Ticketing application for Android devices on the Android Market (Google Play). Search for "Mobile Ticketing" in the Android Market.

An agency may also make Mobile Ticketing available for download on its website.

Downloading Mobile Ticketing from the Apple App Store

Riders download the free Mobile Ticketing application for Apple devices in the iTunes App Store. Search for "Mobile Ticketing" in the iTunes App Store.

An agency may also make Mobile Ticketing available for download on its website.

Mobile Ticketing Rider Mobile Application Requirements

Operating System	Minimum Version
Android	5.0 and later
iOS	8.0 and later

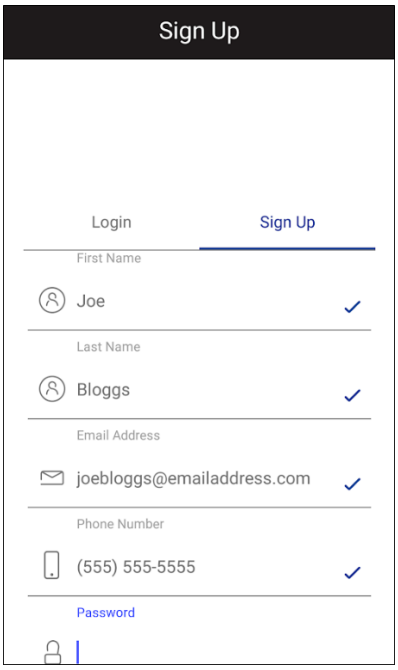
Other Requirements

- Connection to a cellular network to purchase a ticket
- Access to device location services to purchase a ticket and use the trip planner
- Access to device microphone to display a ticket to the driver or fare inspector

Signing Up for a Mobile Ticketing Account

You can use Mobile Ticketing as either a guest or registered user. With both of these options, you will still need to agree to the Terms and Conditions and Privacy Policy to use the app. If you wish to register and create a Mobile Ticketing account, follow these steps:

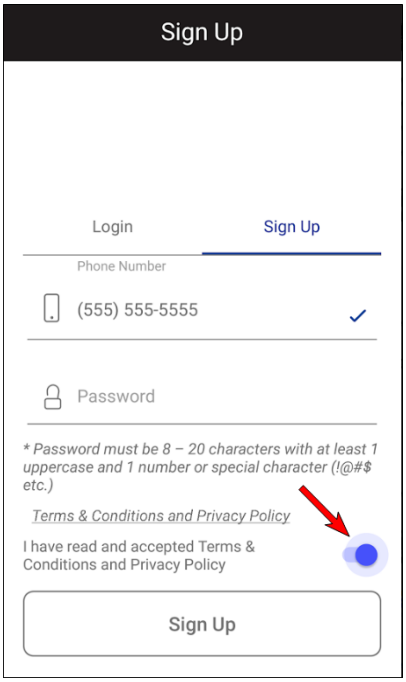
1. To create a Mobile Ticketing account, first download the Mobile Ticketing mobile app. You can find instructions here.
2. Open the Mobile Ticketing app on your phone. The login screen will display.
3. Tap the **Sign Up** button.



4. Complete the following registration fields:
   - First name
   - Last name
   - Email
   - Phone number
   - Password

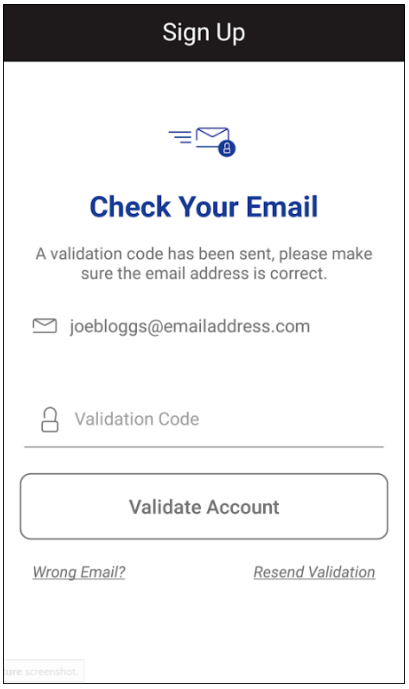
> **Note:** Your account password must be between 8 and 20 characters and must contain at least one uppercase letter and one number or special character. Example: **blueBus3**

5. Confirm that you have read and agree to the **Terms and Conditions** by tapping the toggle button .



6. Tap **Sign Up**.

   A validation code will be sent to your email address. If the validation code does not appear in your inbox, verify that your email address is correct. If you need to change your email address, tap the **Edit Email Address** button.



> **Note:** The validation code will expire in 10 minutes. If it expires, you will need to restart the Sign Up process.

7. Enter the validation code from the email you received.
8. Tap **Validate Account**.

   A confirmation screen will appear if your account is validated.

   If unsuccessful, Mobile Ticketing will prompt you to **Try Again** or **Resend Validation Code** to your email address.

Why Create an Account for Mobile Ticketing?

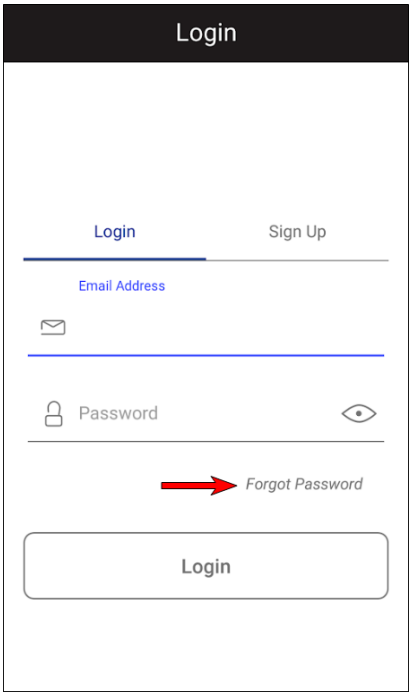
While you can choose to use Mobile Ticketing as a Guest, creating an account has important benefits. As a registered user, you can:

- enter information about your service eligibility, such as indicating whether you are ADA (Americans with Disabilities Act) Eligible. The ADA requires transit agencies to provide paratransit services to people with disabilities who cannot use the fixed route bus or rails service (also known as mainline service).
- recover your passes in the event that your device is lost or stolen. Guest users cannot recover their passes in this way.
- Transfer your passes between devices using the Sign Out and Synchronize features.

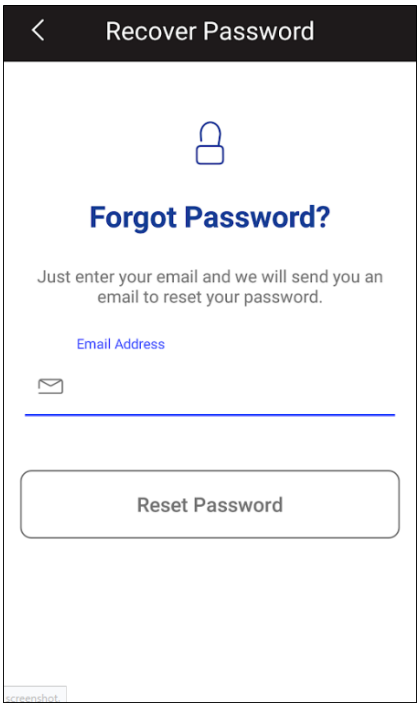
Recovering Your Password

To recover your password, follow these steps:

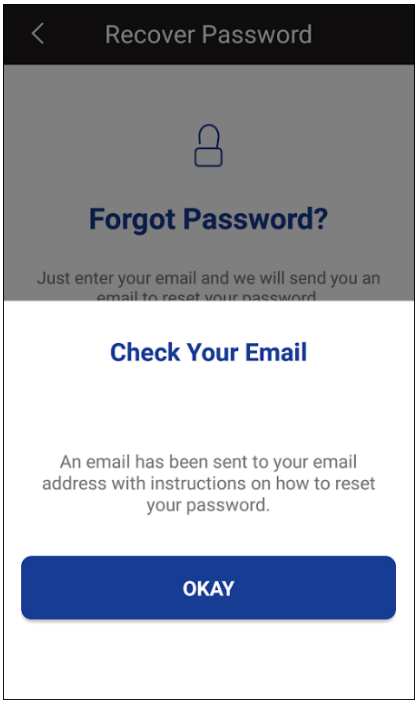
1. From the login screen, tap **Forgot Password?**



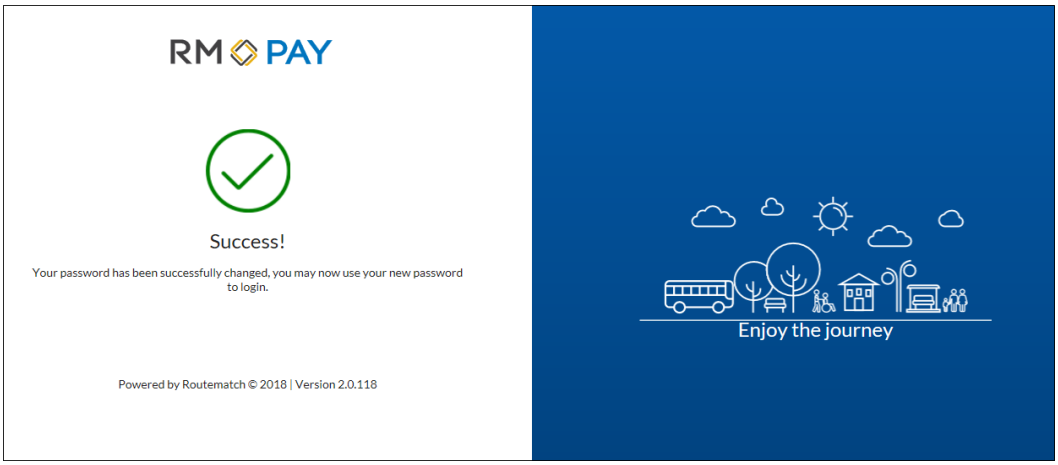
2. Enter your email address.
3. Tap **Reset Password**.



4. Mobile Ticketing will send a password reset link to the email address you entered.



5. Open your email and click the **Change Password** link. You will receive a success message when the password is changed.



6. You may now use your new password to log in.

Using Mobile Ticketing

You can access Mobile Ticketing's main features from the side menu. Tap the menu button at the top of the screen.

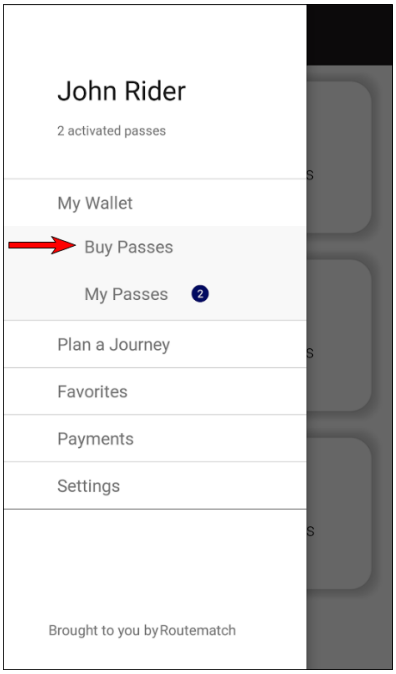
From the side menu, you can choose to:

A. View My Wallet to buy passes, activate your pass, or show your pass for verification.

B. Plan and begin a trip using the Trip Planner.

C. Access your Favorites. These are trips that you have saved. You can view the itineraries for these trips or choose to begin a trip and receive real-time directions.

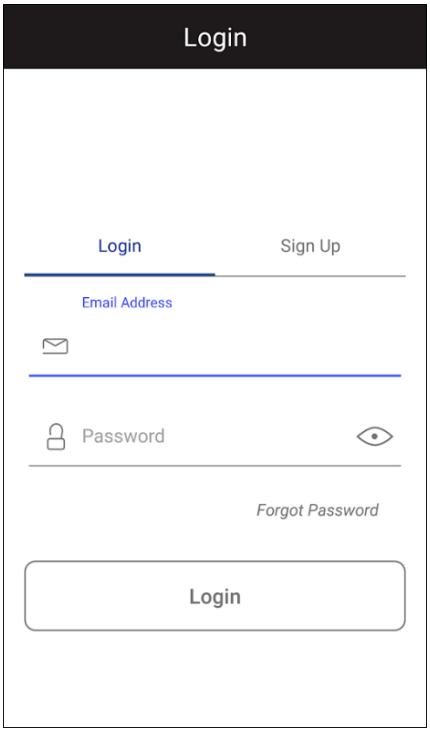
D. Go to the Settings screen, where you can view account details, select your ADA Eligibility, manage your payment options, change your password, or sign out.



Logging In to the Mobile Ticketing App

After you have created a Mobile Ticketing account, you can log in to the app using your email address and password. To do this:

1. From the Login screen, enter your email address.
2. Next, enter your password.
3. Tap **Login**. You are now logged into Mobile Ticketing.

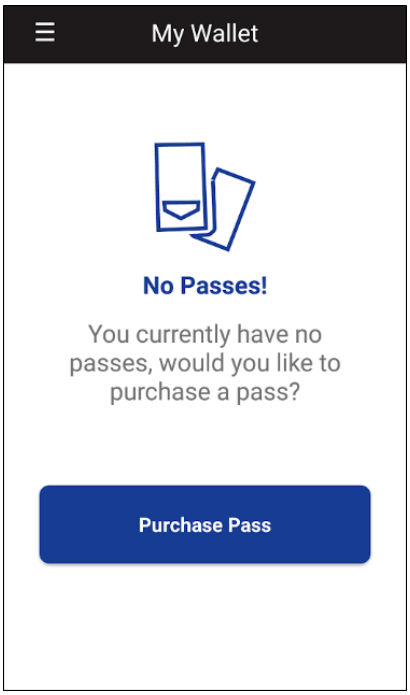


4. If you wish to use Mobile Ticketing as a Guest, tap **Continue without logging in** at the bottom of the screen.

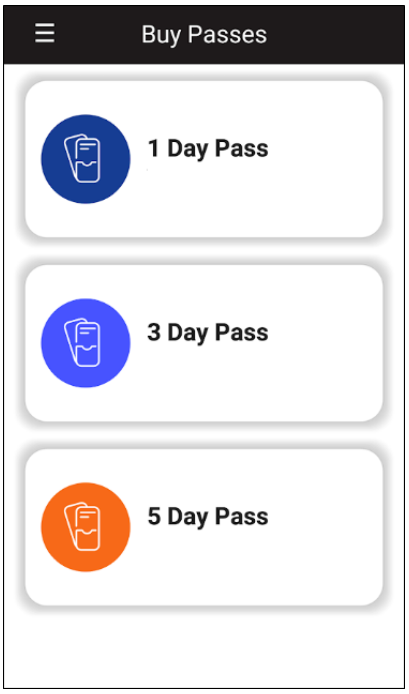
Purchasing a Pass

Mobile Ticketing allows users to purchase a pass as either a guest or as a registered user. To purchase a pass:

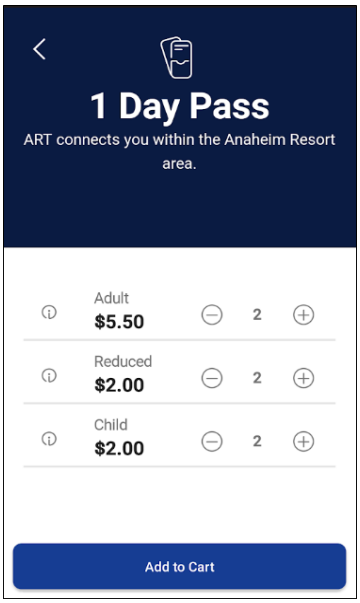
1. Navigate to the **Buy Passes** screen by tapping **Purchase Pass** under **My Wallet**.



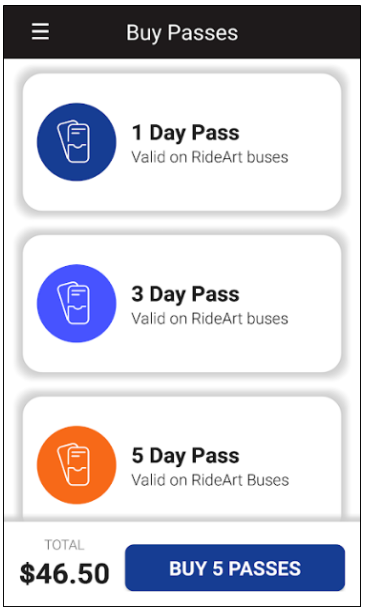
2. Your agency may have different types of passes available for purchase. Select one of the available pass types. You may select and purchase additional pass types.



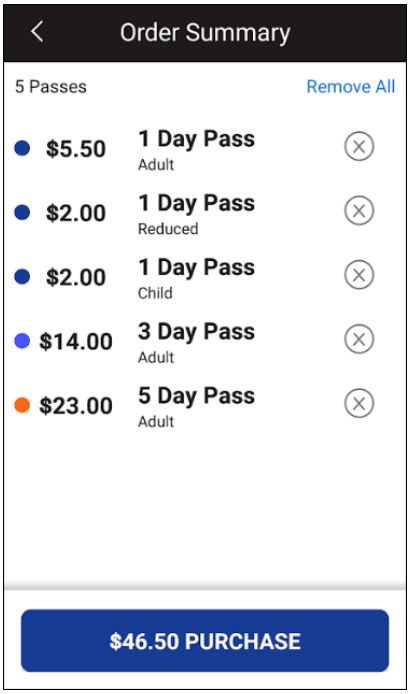
3. Select the number of passes you wish to purchase by tapping the **minus (-)** and **plus (+)** buttons next to the **Adult**, **Reduced**, or **Child** fare options.



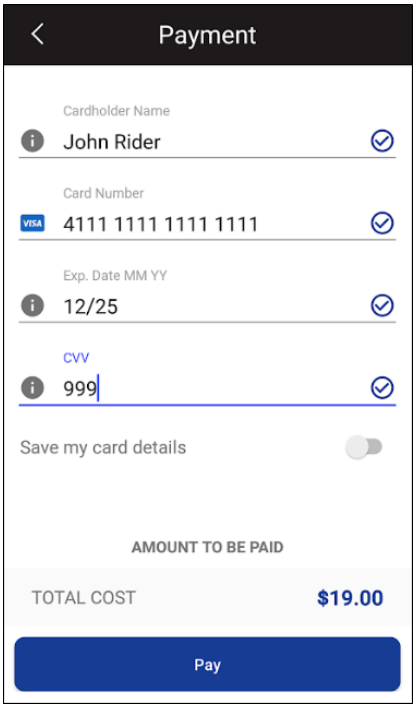
4. Tap the **Add to Cart** button. The passes will be added to your cart.
5. After you have made your pass selections, tap the **Buy Passes** button.



6. Tap the **Purchase** button.



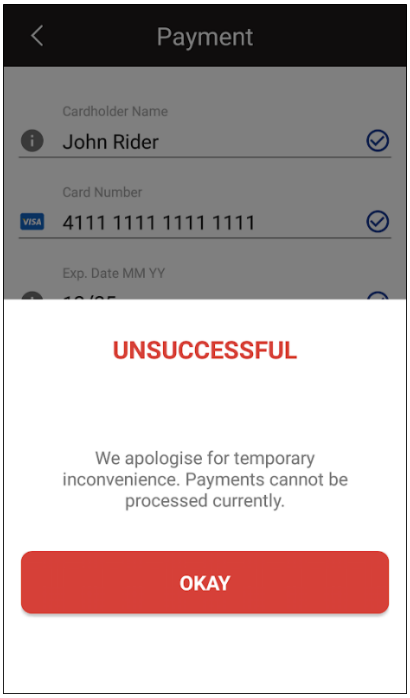
7. Enter your payment information. This includes:
    - Cardholder Name
    - Card Number
    - Expiration Date
    - CVV (the code number on the back of your card)



8. Be sure to select whether you want to **Save my card details**. This will securely save your credit card information.

> **Note:** If you save your card details, you can quickly select the card you wish to use next time you purchase a pass. You will only need to enter your CVV number.

9. Review your purchase details and confirm that the information you have entered is correct. When you are satisfied, tap **Pay**. A success message displays when the payment is successful. Tap **Done**.
10. If your purchase was unsuccessful, tap **OKAY** and reenter your payment information.



11. You can then View Pass Information under **My Wallet** or Activate a Pass. You may also need to enable location services before you can complete your purchase.

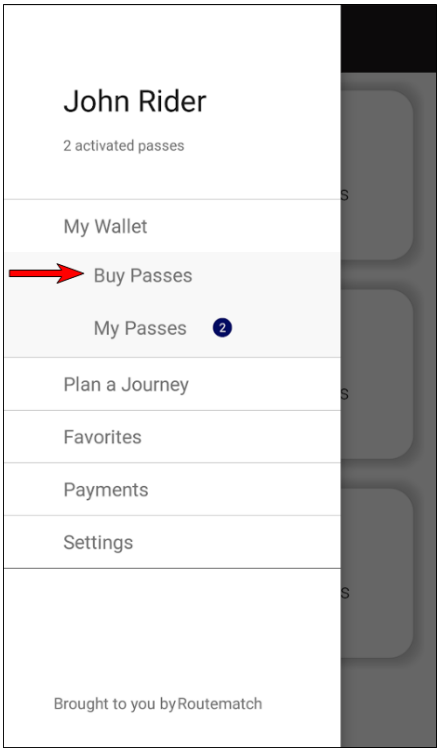
My Wallet

My Wallet allows you to manage your passes, view pass information, and purchase new passes. You can access the **My Wallet** button from the side menu.

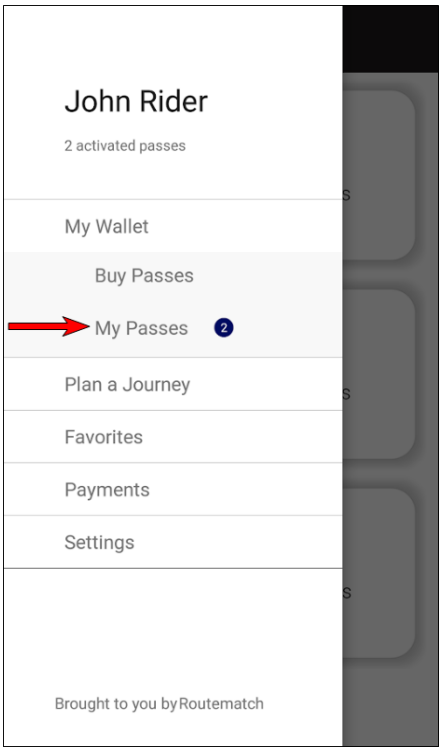
My Wallet allows you to:

- Buy a Pass
- View Pass Info
- Activate a Pass
- Show a Pass for Validation

To purchase passes, tap the side menu icon , then tap **My Wallet** > **Buy Passes**.



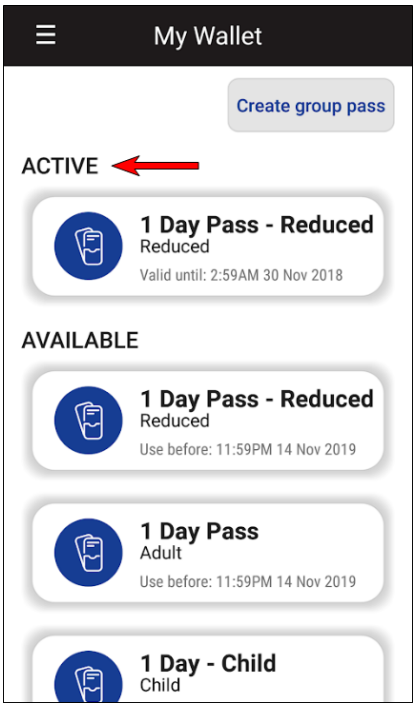
To manage passes (view pass information, activate passes, show a pass for validation), tap the side menu icon ☰, then tap **My Wallet** > **My Passes**.



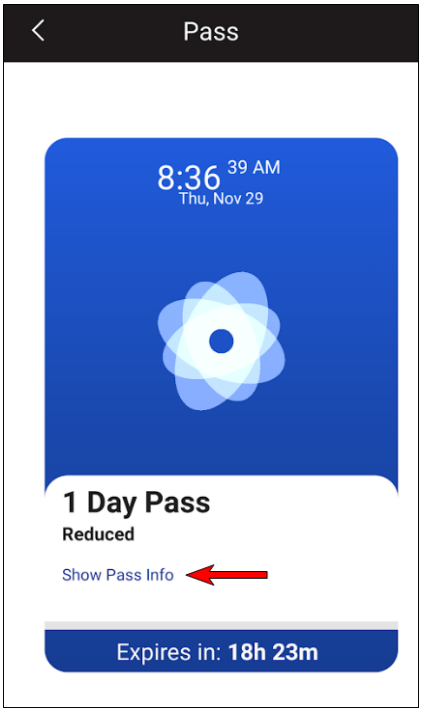
Viewing Pass Information

You can view detailed information about a purchased pass from the My Wallet screen. A pass must be activated to view detailed pass information. To do this:

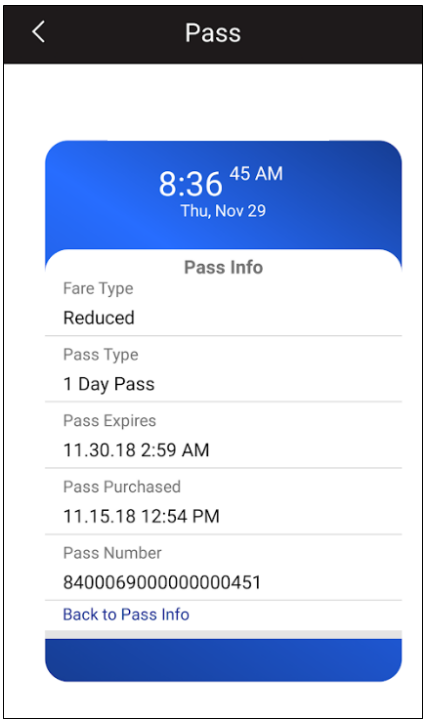
1. Tap **My Wallet > My Passes** from the Mobile Ticketing side menu.
2. Tap an **Active** pass you wish to view.



3. Click the **Show Pass Info** button.



4. Detailed information about your pass will display.



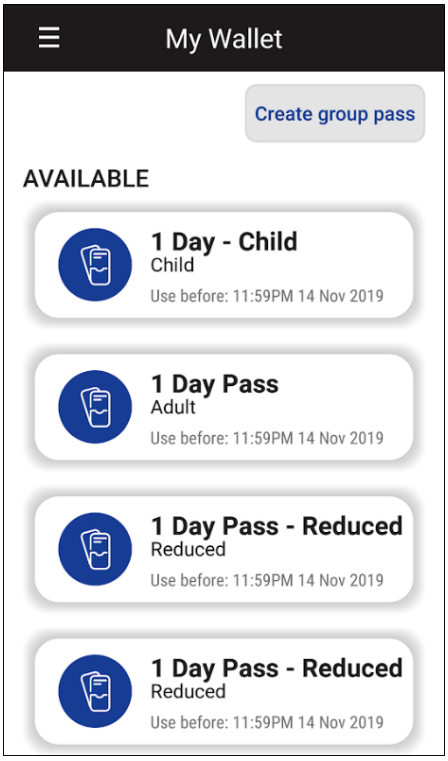
Activating a Pass

Activate a pass before you wish to board a vehicle. Activating a pass prepares it to be displayed to a driver or fare inspector by tapping the active pass.

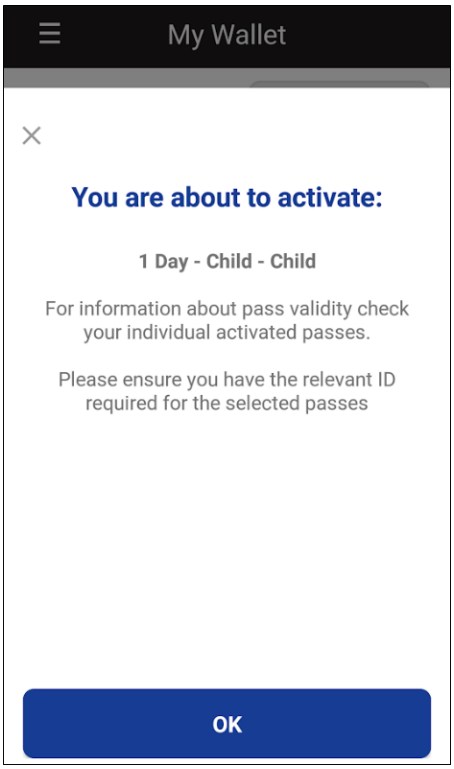
> **Note:** When you activate a pass, it will expire at a time and date determined by your agency. Do not activate your pass until shortly before you are ready to use it, such as when you are about to begin your morning commute.

To activate your pass:

1. Navigate to the **My Wallet > My Passes** screen.
2. Tap the pass you wish to activate.



3. Confirm by tapping the **OK** button. Your pass will now be active.

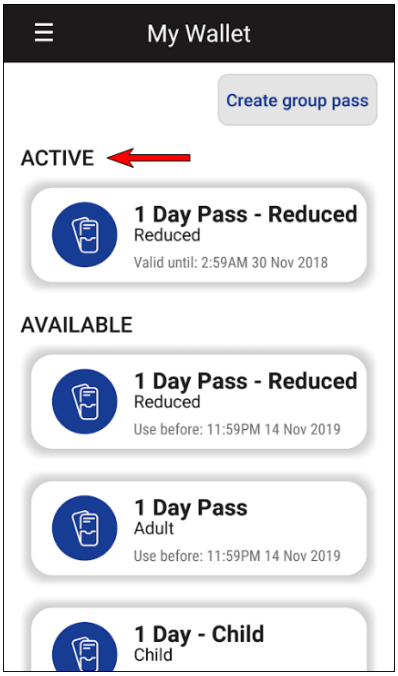


4. You can now show your pass to the driver by tapping the active pass. See How to Show a Pass for Validation for details.

Showing a Pass for Validation

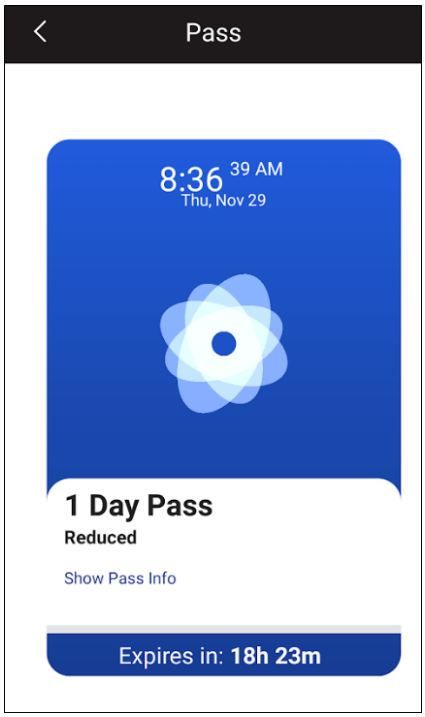
With Mobile Ticketing, you do not need a paper copy of your pass; it exists right on your smart phone. Once you purchase and activate a pass, Mobile Ticketing allows you to show your pass on your smart phone to a driver or pass inspector. The driver or pass inspector can then quickly determine whether your pass is authentic and allow you to board the vehicle.

1. To show your pass for approval, go to the **My Wallet > My Passes** screen.
2. Tap an **Active** pass that you wish to show to the driver or pass inspector.



> **Note:** Before you can show your pass, you will first need to activate your pass. See Activating a Pass for instructions. Your pass will now be active and ready to show to the driver or pass inspector.

Your active pass displays the following information:



A. Today's time and date

B. A sound-activated image that will dynamically change based on the level of ambient noise; the driver or pass inspector uses this to ensure your pass is authentic

C. Pass information and fare type, including number of active passes in My Wallet

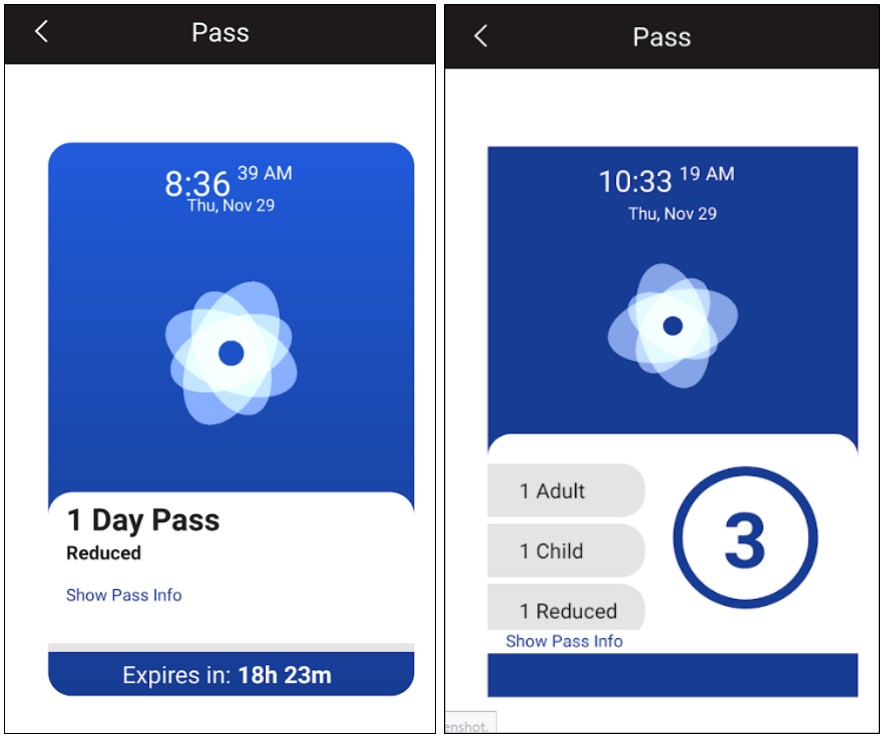
D. Expiration date

Creating Group Passes

Mobile Ticketing makes it easy for you to purchase passes for your group. You only need to display one pass for the driver or fare inspector to validate multiple fares for you and your party. Simply purchase the number of passes you need, and activate each of them in My Wallet. The driver or fare inspector can see how many passes you are using by glancing at your mobile pass.

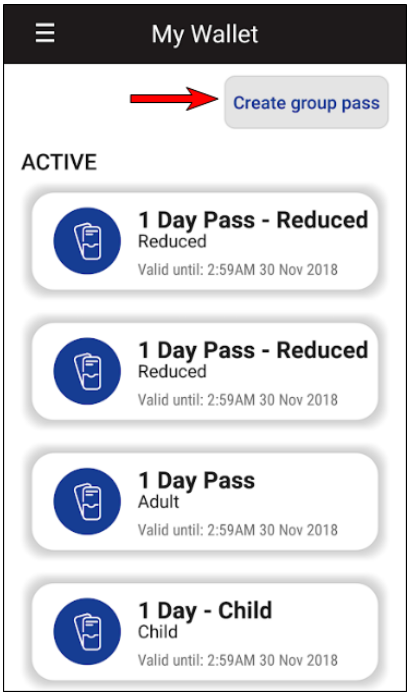
The number next to the fare type represents the number of purchased and activated passes on the device.

A mobile ticket representing one active pass for one rider vs. a mobile ticket representing three active passes for three riders:

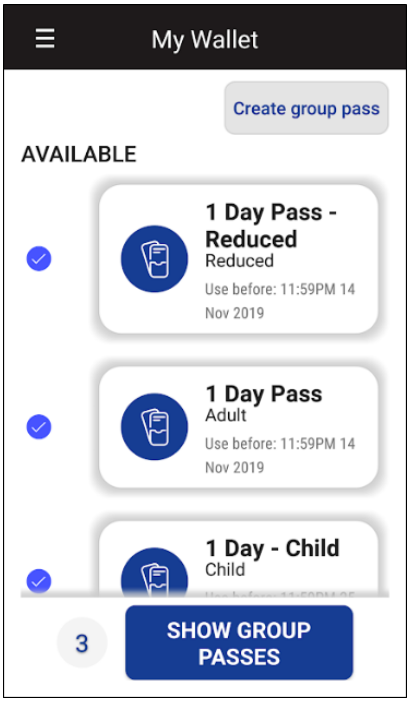


To create group passes:

1. Tap **My Wallet > My Passes** from the Mobile Ticketing side menu.
2. Tap **Create group pass**.

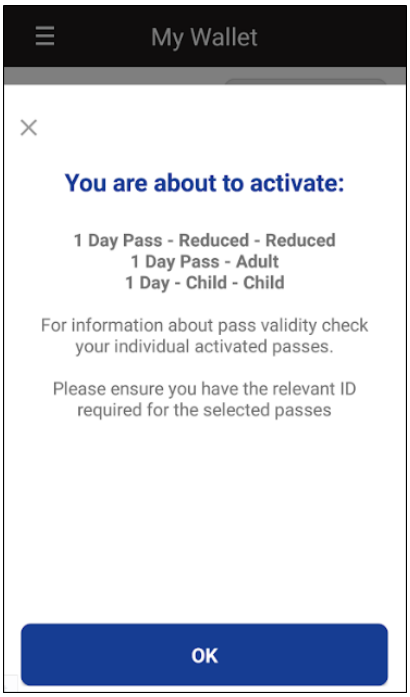


3. Select the passes you wish to group together and tap **Show Group Passes**.

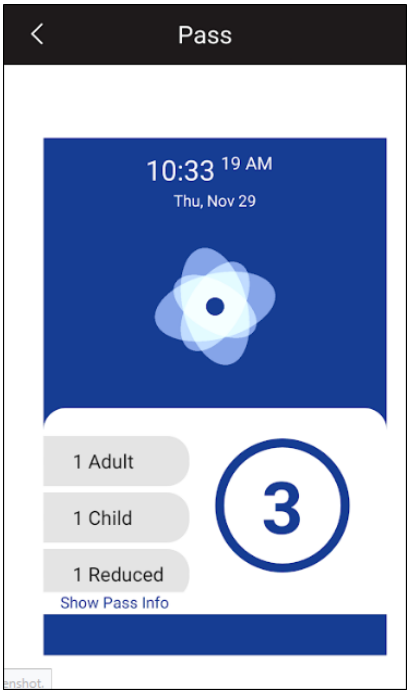


4. If the passes have not been activated, you will be prompted to activate the passes.

You can activate a group of passes together. Click **OK**.



5. The group pass is now ready to display to the driver. Tap **Show Pass Info** to view additional details.



Transferring Tickets to a New Device

Your mobile tickets are associated with one physical device. This means that you can only store your mobile tickets on one device at a time. However, Mobile Ticketing allows you to transfer your tickets between devices. This gives you the flexibility to transfer your tickets when and where you need them.

To transfer your tickets between devices, first log out of Mobile Ticketing on the device that you no longer wish to use. This will release your tickets into the cloud. Then, contact your agency and submit a request to transfer tickets to a new device. Next, log in to Mobile Ticketing using the same account on your new device. Mobile Ticketing will prompt you to synchronize with the cloud and transfer your tickets to the new device.

Trip Planner

The Mobile Ticketing Trip Planner allows you to build a travel itinerary that will take you from your origin to destination. You can choose to build this trip right now - or you can choose to plan ahead and schedule your trip in the future.

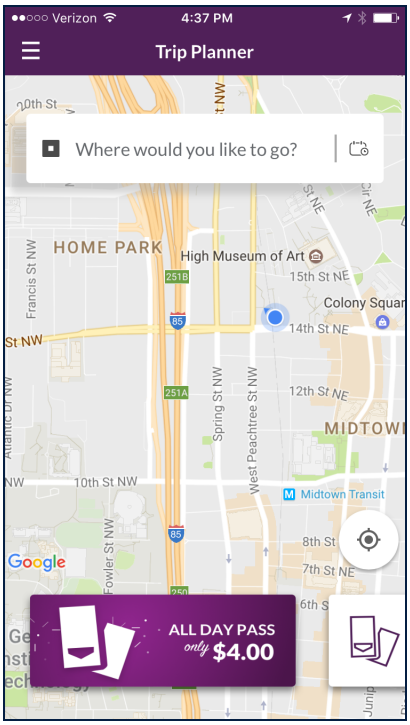
Once you enter your start and end addresses, the Trip Planner displays a map that shows your path from your origin to your destination. This map also shows you which transporation modes are available to help you complete your journey.

From the Trip Planner, you can also purchase a mobile ticket and save a trip origin and destination to your Favorites.

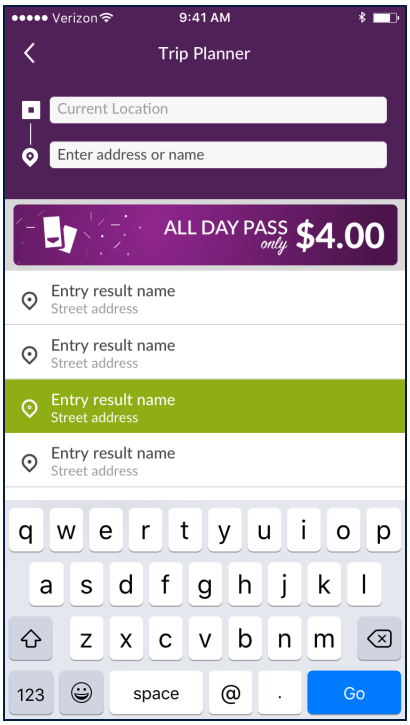
Planning a Trip Using Mobile Ticketing

To plan a trip using Mobile Ticketing, follow these steps:

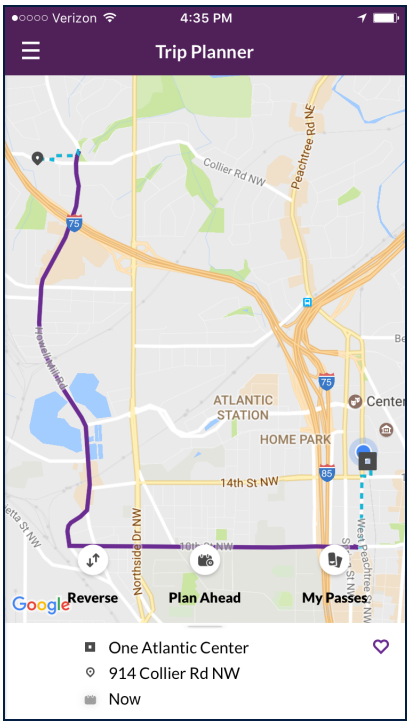
1. From the Trip Planner screen, tap **Where Would you Like to Go?**



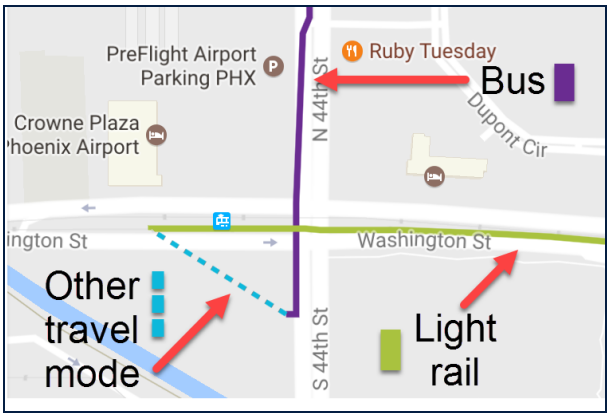
2. Enter your destination in the **Enter Address or Name** box. Select the option from the list below that most closely matches your destination.



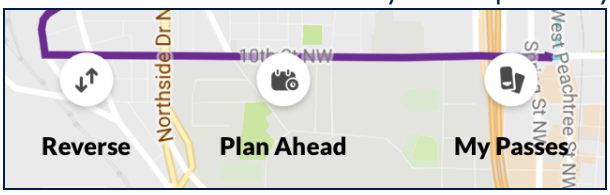
3. Mobile Ticketing will display your itinerary for you to view. In addition to drawing your route on the map, Mobile Ticketing allows you to view the various modes of transportation that you will use along your trip.



If your itinerary has more than one mode of travel (bus and light rail, for example), each leg of your journey will be represented in a different color, as shown in the image below.

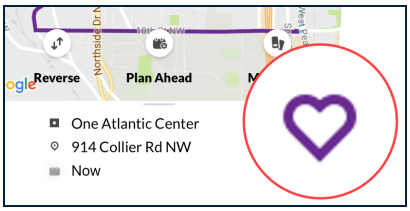


The buttons at the bottom of your map allow you additional actions:



- Tap the **Reverse** button to swap your origin and destination addresses.
- Tap **Plan Ahead** to schedule this trip for a future time and date.
- Tap **My Passes** to view your passes or to purchase a new pass.

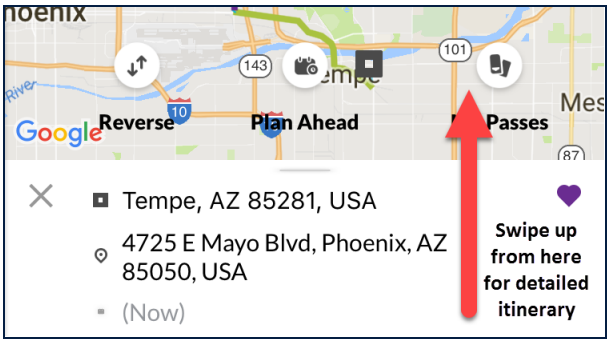
You can choose to add this trip to your Favorites by tapping the heart ♥ button next to the itinerary name.



View Detailed Itinerary

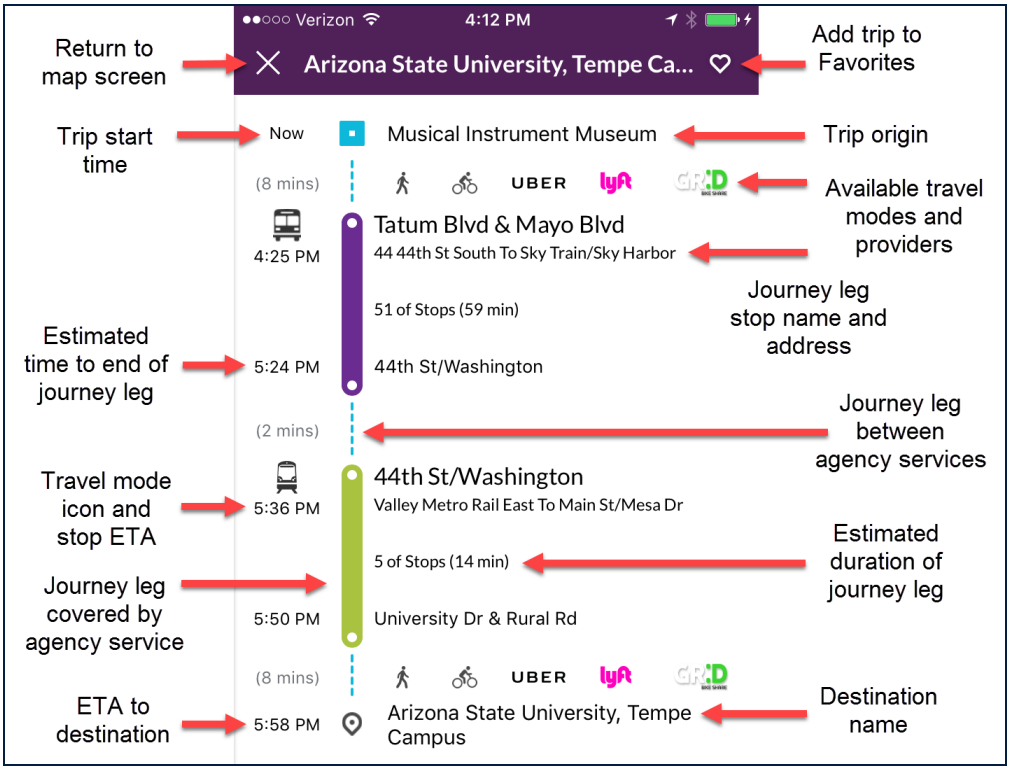
The Mobile Ticketing Trip Planner allows you to view detailed information about your itinerary beyond what appears on the trip map.

To view the detailed itinerary, swipe up on the bottom portion of the screen (with the origin and destination addresses) to reveal a detailed trip itinerary.



This itinerary shows you which segments of your trip are covered by your agency's transit modes, the estimated time you will spend on each leg of your journey, and also provides links to third-party transit services for portions of your journey not covered by your agency's services.

The image below illustrates how to read your detailed itinerary.

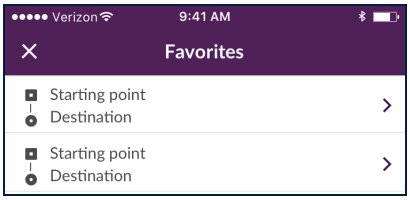


Tap the **X** at the top of the screen to dismiss the detailed itinerary.

Favorites

Mobile Ticketing allows you to save your trips and add them to your Favorites. You can access your Favorites from the side menu.

The Favorites screen displays a list of your Favorite trips.



Tap a favorite trip to view the trip itinerary.

Tap **Start this Trip** to start the trip and receive navigation instructions from Mobile Ticketing.

To remove the trip from your list of Favorites, tap **Remove Favorite**.

Settings

You can access Mobile Ticketing's Settings screen from the side menu.

From the Settings screen, you can:

- Edit your Account Details
- Change your Service Eligibility
- Change your Password
- View Mobile Ticketing Terms and Conditions
- View Mobile Ticketing Privacy Policy
- Offer Feedback on Mobile Ticketing
- Synchronize Passes
- Sign Out

Editing Your Account Details

You can edit your account details, including your email address, phone number, and date of birth from the Settings screen.

Changing Your Service Eligibility

> **Note:** To change your service eligibility, you first need to register with Mobile Ticketing.

To change your service eligibility within Mobile Ticketing:

1. Access the **Settings** screen from the side menu.
2. Tap the **Edit** button at the top of the screen.
3. Scroll down to the **Eligibility** section.
4. Swipe the Eligibility button for the status for which you qualify.

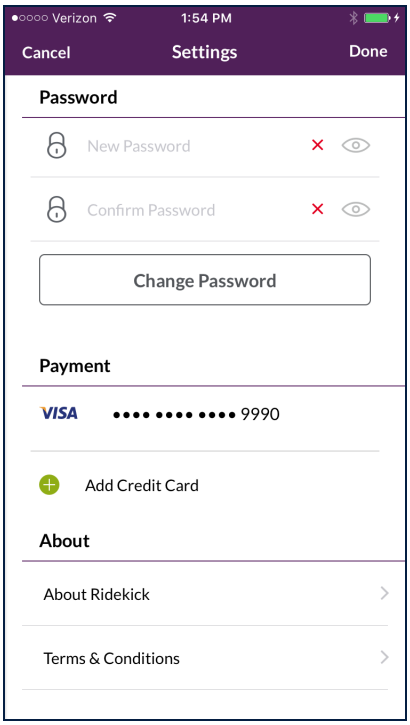
> **Note:** You can tap **What is this?** to read more about a particular eligibility type.

5. Tap **Save** to finalize the change to your service eligibility.

Adding a Credit Card

You can add a credit card from the Settings screen.

1. Open the **Settings** screen.
2. Scroll down to **Payment** options.
3. Tap **Add Credit Card**. Then enter your payment information.



Terms and Conditions

You can review the Mobile Ticketing Terms and Conditions from the Settings screen.

The Terms and Conditions outline important rules and information regarding using the mobile app and mobile tickets.

Privacy Policy

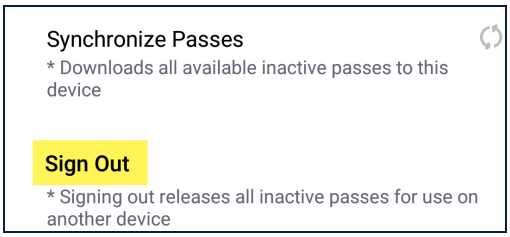
You can review the Mobile Ticketing Privacy Policy from the Settings screen.

The Privacy Policy details how Mobile Ticketing handles your personal information.

Sign Out

You can Sign Out of Mobile Ticketing from the Settings screen.

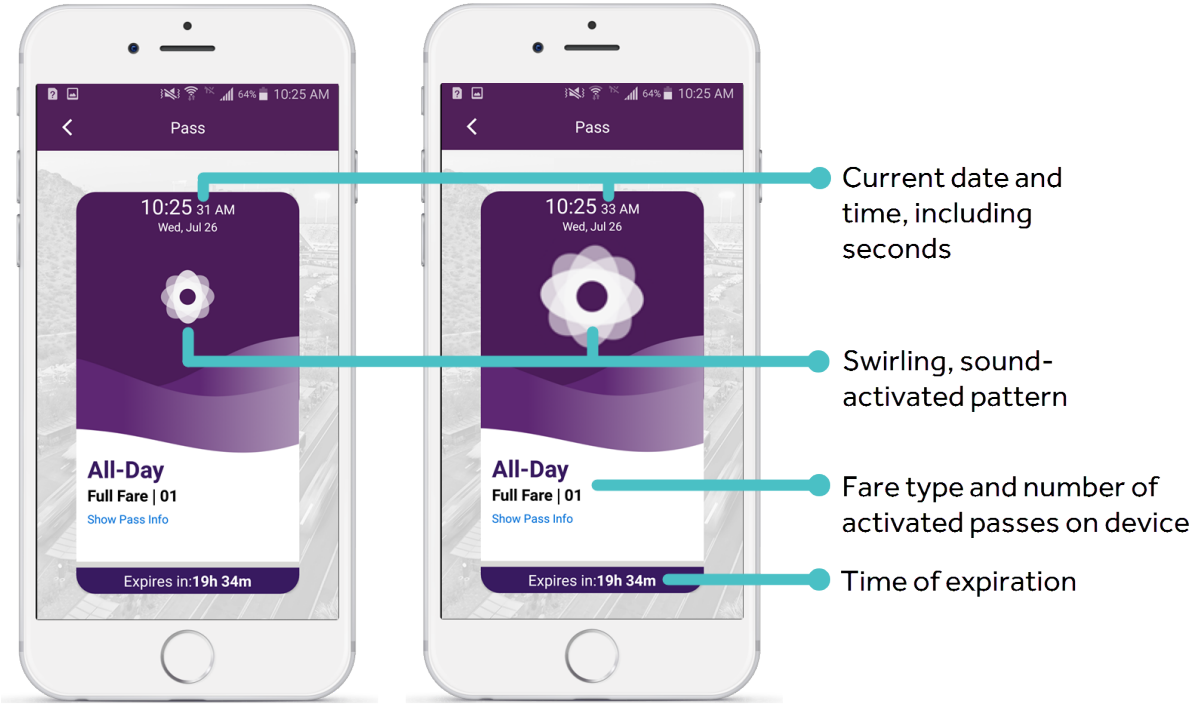
When you Sign Out, your tickets will be removed from your phone and saved in the cloud. When you log back in, your passes will return to your device. Sign Out is a part of transferring your tickets to a new device.



Visual Pass Validation

Mobile Ticketing's visual pass validation features allow drivers or fare inspectors to quickly determine whether a rider's pass is valid. Look for a swirling spiral design in the center of the pass along with a timestamp. The trip should be counted as a free ride at the farebox or on a handheld verifier.

- Mobile Ticketing uses the device's microphone to produce a swirling pattern that responds to noise.
- The design will quickly "pulse" or grow larger when exposed to noise; it will become smaller when there is little or no noise.
- The design will constantly rotate at the same speed even when there is no noise.
- The current date and time, incremented in seconds, appears immediately above the pattern.
- These features work even when the mobile device is not connected to the Internet.



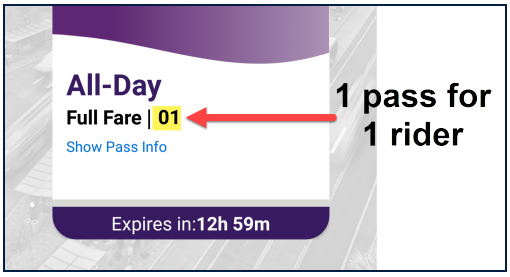
By glancing at the dynamic sound-activated pattern and the current date and time, the driver or fare inspector can validate the ticket. Taken together, these features make it easy for drivers and fare inspectors to spot counterfeit or fraudulent passes.

- A phone screen-shot of a mobile pass will not move, respond to sound, or display the current time.
- A screen recording of a mobile ticket will not display the current date and/or time, nor will the pattern respond to sound in the expected way.

Validating Multiple Passes on One Device

A rider can use a single phone and purchase a pass for themselves and several additional riders. The rider only needs to display one pass for the driver or fare inspector to validate multiple fares. The number next to the fare type represents the number of purchased and activated passes on the device.

A mobile ticket representing one active pass for one rider:



A mobile ticket representing three active passes for three riders:

Mobile Ticketing Prompts and Security Features

Below is a list of prompts (or pop-up messages) and related security features for Mobile Ticketing.

Unauthorized change to OS: Mobile Ticketing cannot start if the OS has been tampered with or modified in an unauthorized way. The user will encounter this message when trying to start the app.

Permission to use location: Pass purchase, pass activation, and the Trip Planner require that Mobile Ticketing accesses your location information from your device.

Permission to receive notifications: Currently notifications are not available.

Mandatory phone lock: Riders must have a phone lock enabled on their device, such as a PIN required to open the smart phone.

Permission to use microphone: The device's microphone is necessary to activate a pass.

Ticket activated without microphone enabled: This is specific to visually impaired users using accessibility settings.

Maximum number of activated passes on a daily basis: The number of passes that a rider can activate each day.

Maximum number of tickets to be purchased for each transaction: The maximum number of passes that a rider can purchase with each transaction.

Online access mandatory after a period offline: Due to the risk of fraud, Mobile Ticketing prompts users to get online to continue using the app after a period of time offline.

Enabling Location Services

You may need to enable location services on your phone in order to use certain features of Mobile Ticketing.

When Using Mobile Ticketing for iOS (Apple)

- Allow Mobile Ticketing to access your location while you use the app. To do this, click **Allow** on the pop-up menu that appears after you tap the Locate Me button.
- Enable location services for Mobile Ticketing. Go to **Settings** > **Mobile Ticketing** > **Location**. Then select **While Using**.
- If the fixes above do not work, try resetting your location services. To do this, go to **Settings** > **General** > **Reset** > **Reset Location & Privacy**.

> **Note:** These steps may change slightly depending your device and OS version.

When Using Mobile Ticketing for Android

- Allow Mobile Ticketing to access your location information when you download it from the Google Play store.
- Enable **Location** by tapping it in the top menu, or by going to **Settings** > **More** > **Location**. Then swipe Location to **On**.
- Change the permissions for Mobile Ticketing in the application manager. To do this, go to **Settings**>**Applications**>**Application Manager**>**Mobile Ticketing**>**Permissions**. Swipe Location to **On**.

> **Note:** These steps may change slightly depending your device and OS version.

CHAPTER 5

Demand Agency Web Portal for Mobile Ticketing

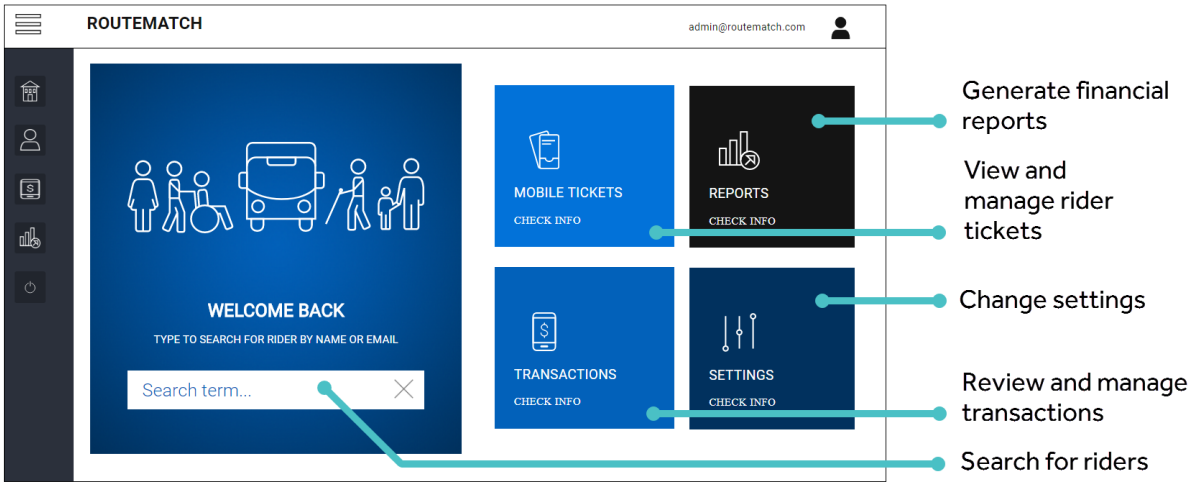
The Demand Agency Web Portal for Mobile Ticketing allows an agency to search for riders and manage their accounts, review transaction and ticket information, generate reports, and release mobile tickets for riders when they need assistance.

This chapter discusses the following:

Routematch
MOBILITY WITHOUT LIMITS

Demand Agency Web Portal for Mobile Ticketing Home Page

The Demand Agency Web Portal for Mobile Ticketing allows an agency to search for riders and manage their accounts, review transaction and ticket information, generate reports, and release mobile tickets for riders when they need assistance.



From the home page, you can:

1. Review transactions
2. Release a rider's tickets
3. Generate and view reports
4. Search for information about specific mobile tickets

Searching for Riders

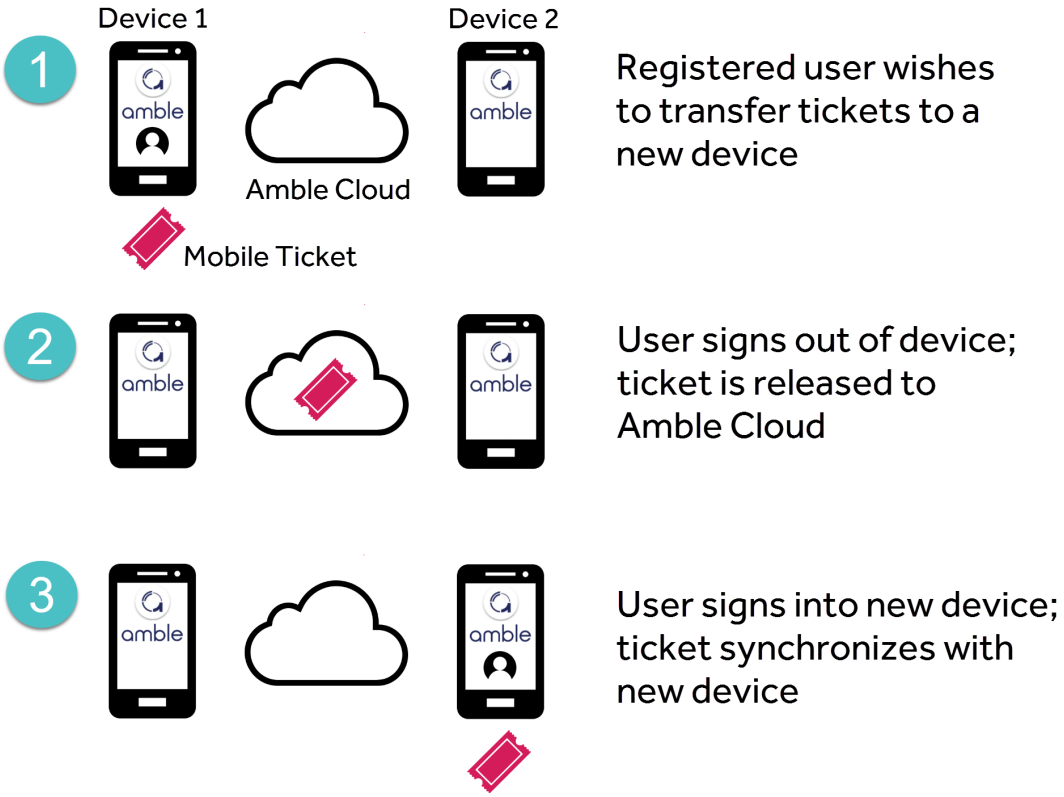
To search for a rider:

1. Click on the **Rider Management** button on the left side menu.
2. Type in the name of the rider, click **Search**.
3. Click on the rider's name you wish to view from the list.
4. The rider's profile page will appear. From here you can:
    - Edit rider account information
    - Audit rider account activity
    - Release a rider's tickets

How Mobile Tickets Work

When a registered user purchases a pass using the app, that pass becomes physically linked to that user's device. For security and fraud prevention purposes, a mobile pass can only be linked with one physical device at a time. For every pass purchased by a registered user, the Mobile Ticketing app keeps track of that pass in the cloud. In this way, no matter what happens, a registered user's passes are never lost.

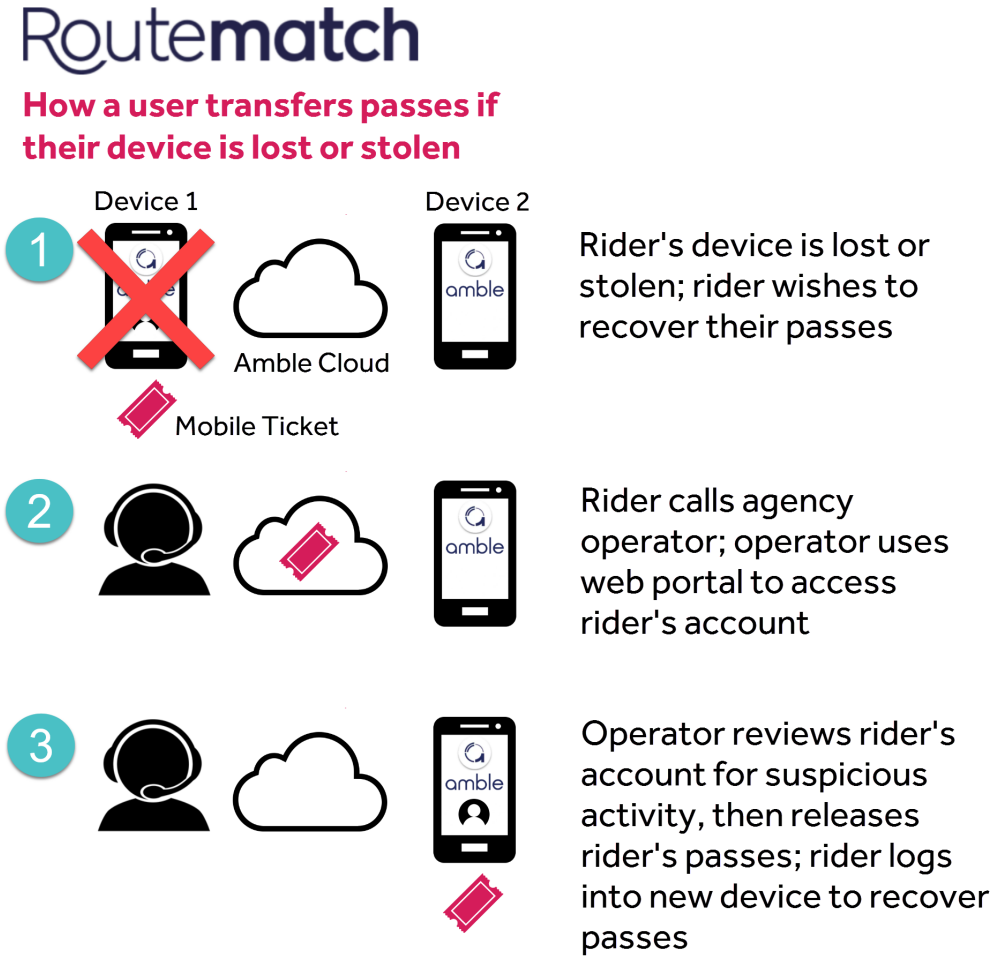
A rider can transfer their passes between devices using the Sign Out and Synchronize features within the app. They can do this themselves as long as they have access to both the old device and the new device. See How to Transfer Tickets to a New Device for more information on how this works from the rider's perspective.



Releasing a Rider's Tickets

If the device on which a user's tickets are stored is lost or stolen, malfunctions, or a rider uninstalls the app without first signing out, a rider will need help from an agency operator to recover their tickets.

Using the Release feature in the agency web portal, an operator can release the rider's tickets into the cloud. The rider will then be able to log in to a new device and recover their tickets. Note that only valid, un-activated passes can be Released. Also note that a guest user's passes cannot be recovered in this way. That's why it's important for riders to register using the app.



Releasing a Rider's Tickets

To release a rider's tickets using the Demand Agency Web Portal for Mobile Ticketing:

1. Search for the rider's account using their name and/or email address in the web portal.
2. Click on the rider to bring up their account information.
3. **Now, this next step is very important**. Before you release a rider's tickets, you should first review the Audit Log for that rider's account. The Audit Log shows the rider's recent activity using the app. This information can help you determine if the rider may be attempting to commit fraud.
4. Once you've reviewed the Audit Log and have determined that the request is valid, click **Release**.

5. A confirmation pop-up will appear. The rider can then Sign In to the app on a mobile device with an internet connection in order to recover their tickets. If the rider is already signed in, they can tap Synchronize Passes in My Wallet.

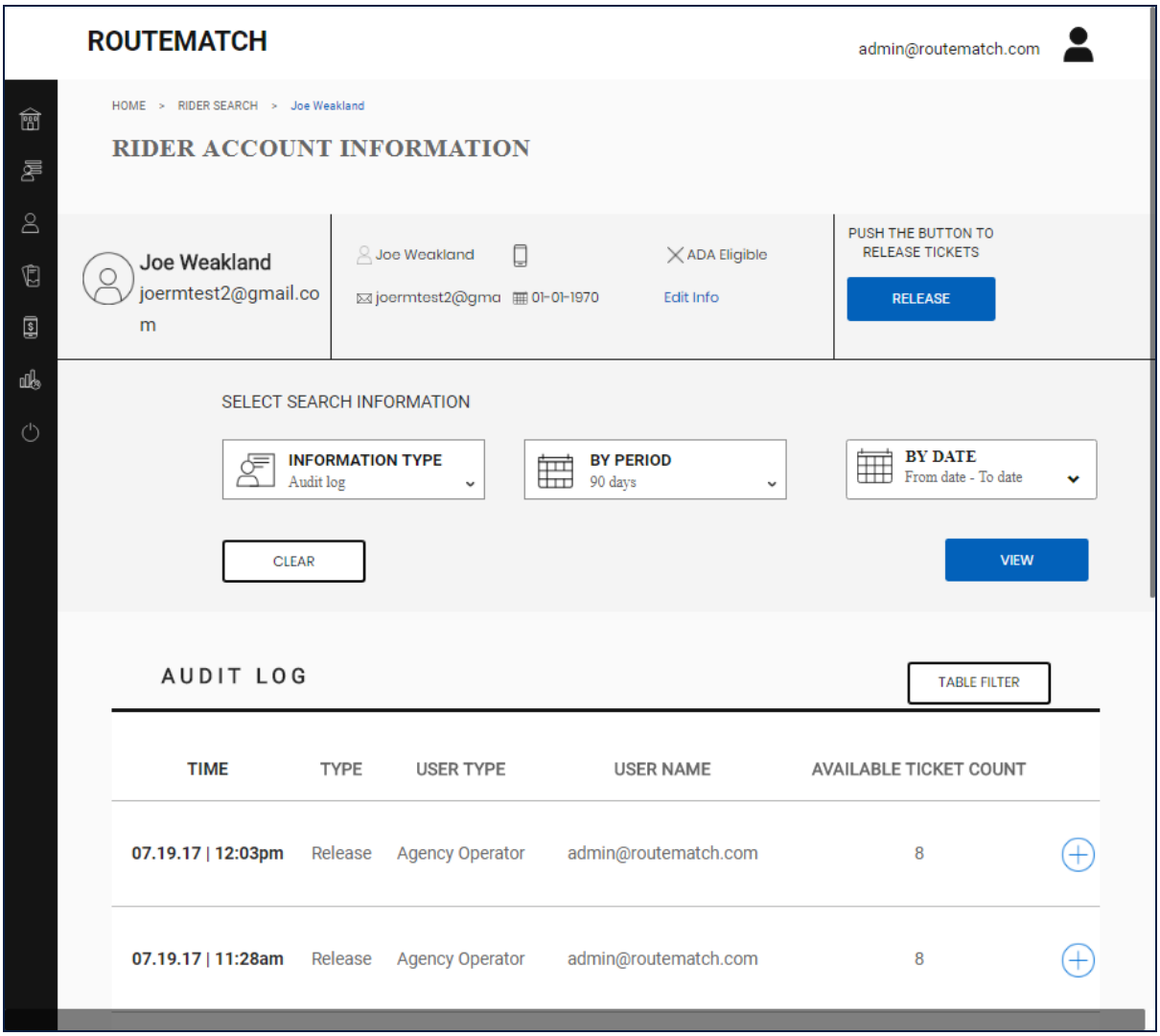
> **Note:** If necessary, you might need to explain to the rider that you can help them recover their tickets, but that they'll still need a working mobile device with an internet connection to use the tickets.

Reviewing the Audit Log before Releasing Tickets

Before you release a rider's tickets, you should first review the Audit Log for that rider's account. The Audit log shows the rider's recent activity using the app. This information can help you determine if the rider may be attempting to commit fraud.

To view the Audit Log:

1. From the rider account page, select **Audit Log** from the Information Type drop down menu. Then select a time period or date range.



2. Click **View**. If you see that the rider has recently had their tickets released by another agency operator, then you may wish to deny the rider's request.

> **Note:** Why is this the case? A fare evader might be attempting to commit fraud by working around the app's Sign Out and Synchronize Passes features. A fare evader can turn off the internet connection on their device, and then call an operator to request a pass release. Because the fare evader's device is not connected to the network, this rider will still be able to display passes

even after the passes are released. Then, a second fare evader can sign in to the same account and display fraudulent passes.

There is no reason for a rider's tickets to be released multiple times within a brief time period. If you see that a rider has had their tickets released in the last 1-3 days, this should be a red flag. Follow your agency's policy for releasing tickets in such a scenario.

3. If you see no suspicious activity on the rider's account, continue to release the rider's tickets.

Reports

The Demand Agency Web Portal for Mobile Ticketing allows you to generate multiple types of reports, including:

- Credit Debit Sales
- Detailed Transactions
- Pass Sales Summary

Generating a Report

To generate a report:

1. Click on the **Reports** button to open the Reports page.
2. Select a **Report Type** from the drop-down menu.
3. Select a **Period** or **Date** range for the report.
4. Select the file format that you would like to export the report.
5. Click **Export** to download and open the report.

CHAPTER 6

Pay Mobile Driver Application

The Pay Mobile Driver Application brings the functions of Pay to an agency's drivers by linking directly with RMMobile, a wireless application for touchscreen tablet computers and smartphones that provides a digital solution for an agency's paper manifests. The Pay Mobile Driver Application allows drivers to view a rider's account balance, add extra riders and guests, and to process various payment types. The driver accesses Pay from RMMobile using a tablet or other mobile device.

This section of the guide explains how to use Pay, as well as how Pay connects to RMMobile. Routematch service agents will work with your agency to set up Pay and RMMobile. These topics are not covered in this user guide.

This chapter discusses the following:

Routematch
MOBILITY WITHOUT LIMITS

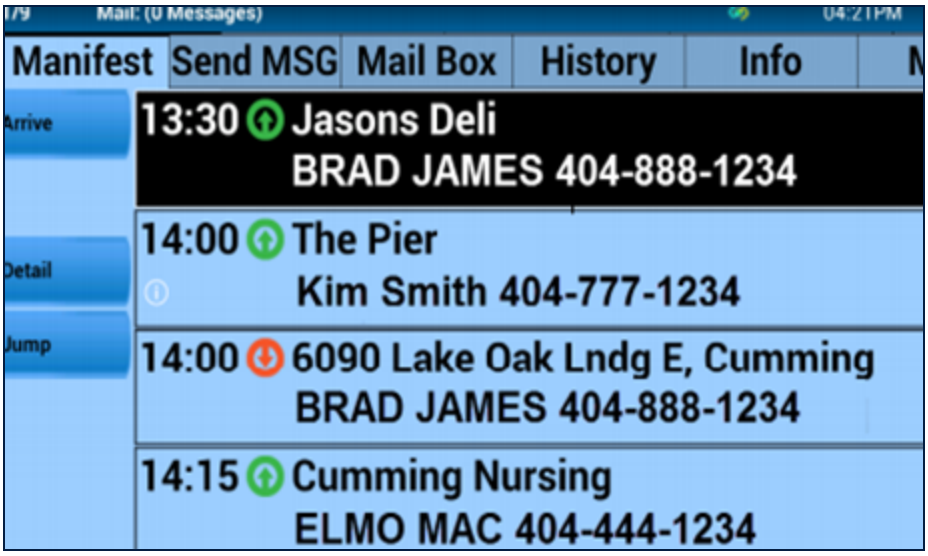
Accessing the Pay Mobile Driver Application

Using the Pay Mobile Driver Application begins in RMMobile. As drivers work through their manifest, they use RMMobile to process stops on their wireless device and send the information to the main Routematch application.

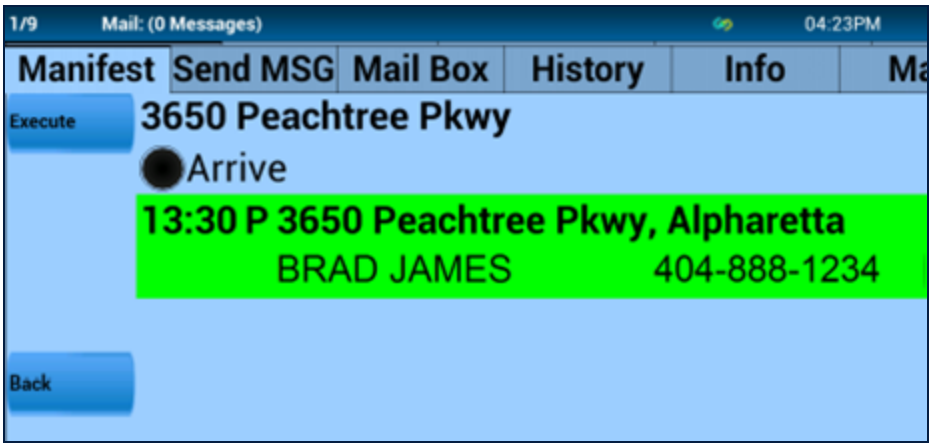
> **Note:** Please see the RMMobile User Guide for detailed instructions regarding using RMMobile. It is not discussed at length here.

Drivers access and use Pay as a customer boards a vehicle and presents their fare. The steps below start in RMMobile and show you how to access Pay when collecting payment from a rider.

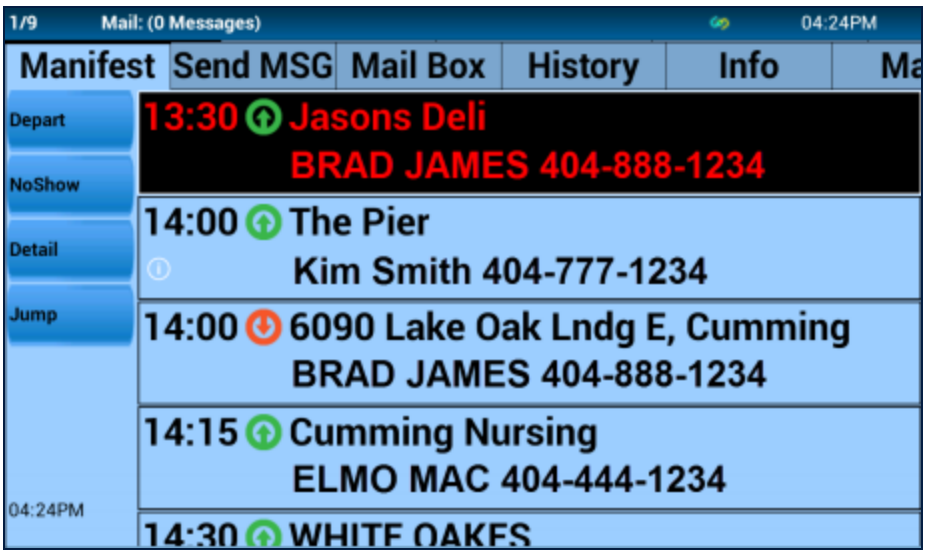
1. When you arrive at the customer's pickup stop, select it on the manifest with RMMobile.



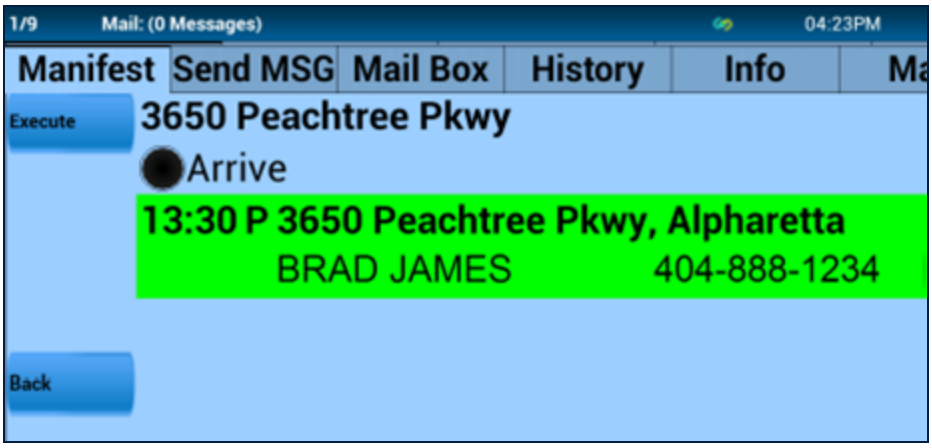
2. Tap the **Arrive** button. The next screen displays the name of the stop with Arrive selected.



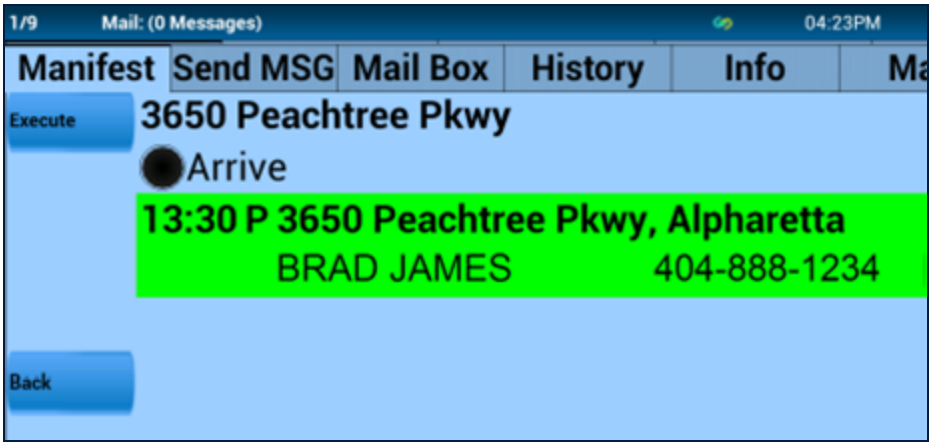
3. Tap the **Execute** button to return to the manifest screen. The stop now appears written in red.



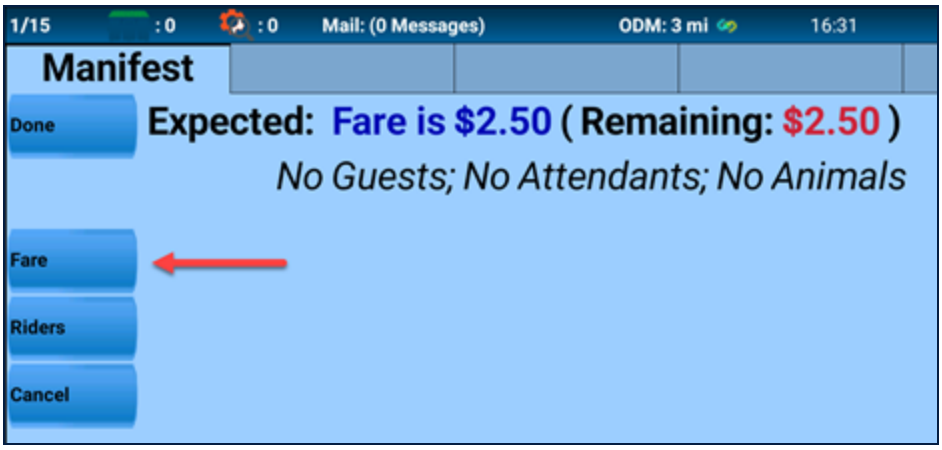
4. When it is time to depart the stop, select the red departure entry and tap the **Depart** button. The next screen displays the name of the stop with Depart selected.



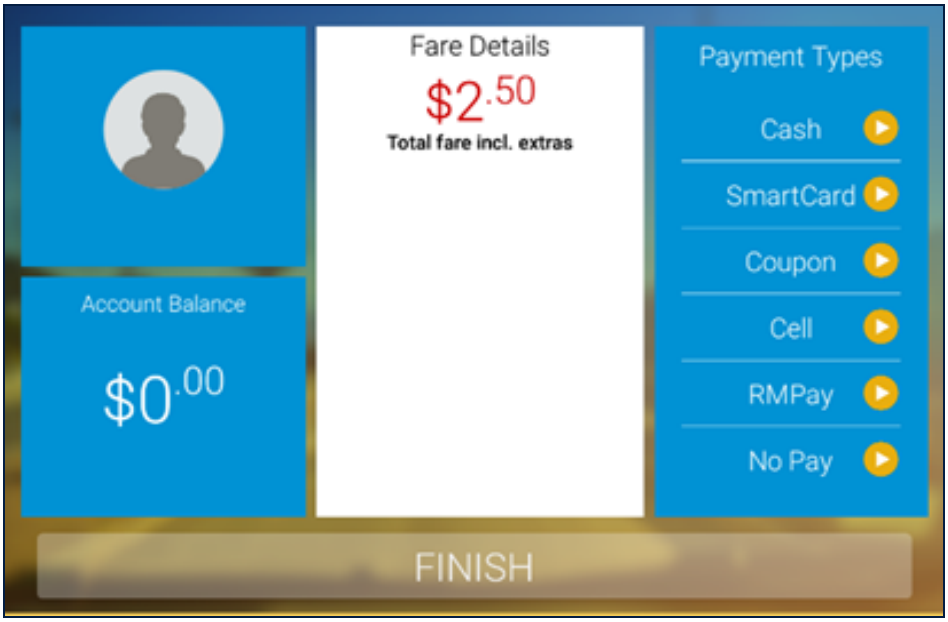
5. Tap the **Execute** button.



6. Tap the **Fare** button.

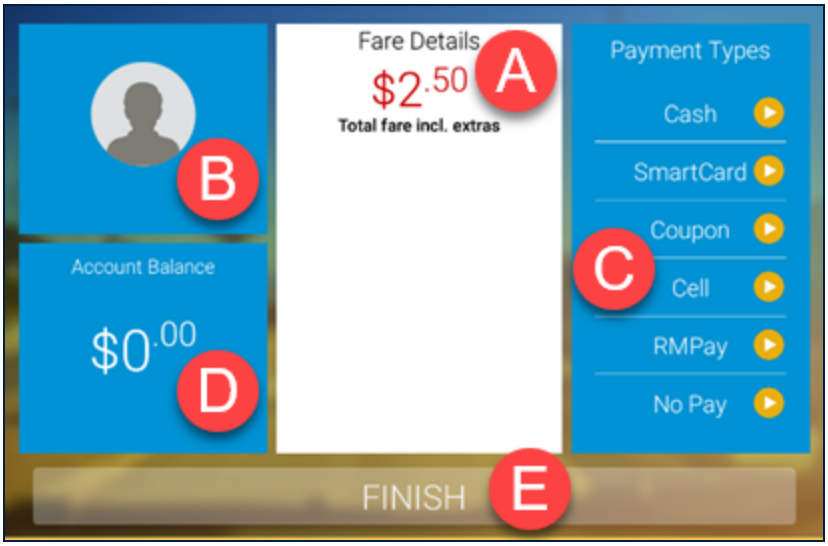


7. Pay will then launch in a separate window.



Using the Pay Mobile Driver Application

The annotated image below details the major components of the Pay Mobile Driver Application.



A. **Fare Details**: Displays the value of the total fare owed, including fare extras

B. **Rider Name and Picture**: Displays the rider's name and picture

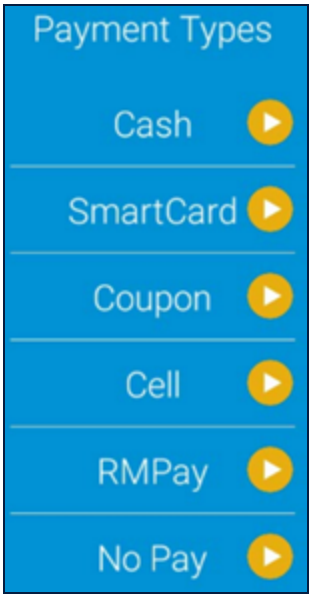
C. **Payment Types**: Allows the driver to process various payment types by tapping the appropriate button

D. **Account Balance**: Displays the rider's Pay account balance and allows the driver to "top up" a rider's account, i.e. add funds to increase the rider's balance

E. **Finish**: Returns the driver to RMMobile

Processing Various Payment Types in the Pay Mobile Driver Application

The following payment types are available to be processed from the Pay menu:

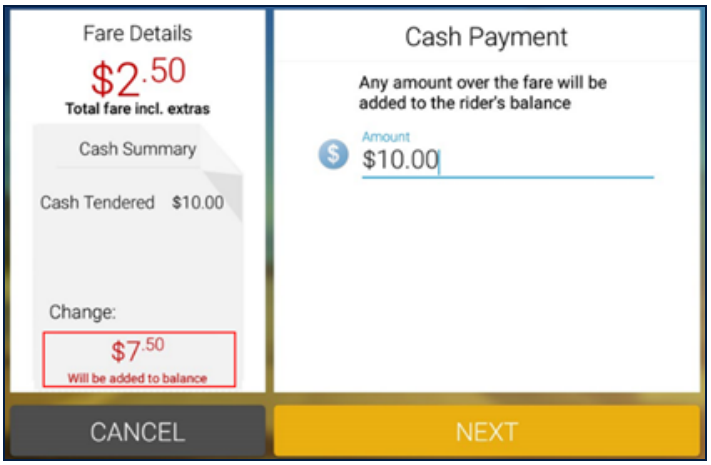


- Cash
- Smartcard
- Coupon
- Cell
- RMPay
- No Pay

Processing Cash Payments in the Pay Mobile Driver Application

If a rider boards a vehicle and wants to pay in cash, the driver follows these steps:

1. Access **RMPay** using the workflow described in the How to Access the RMPay Mobile Driver Application section.
2. Tap **Cash** in the Payment Types list. An on-screen keyboard appears.
3. Enter the amount paid in cash.
4. Tap outside of the on-screen keyboard to return to the **Cash Payment** screen.



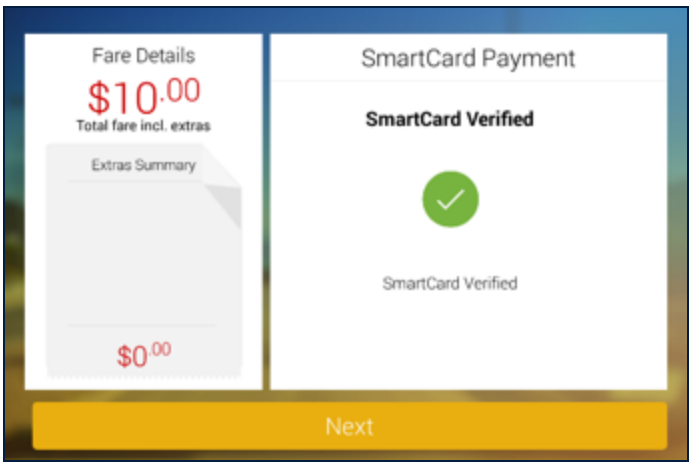
5. Tap **Next**. The balance subtracts the amount paid in cash. The remaining balance due, if any, is displayed.

> **Note:** Any overage is added to the rider's Pay account. For example, if the balance due is $2.50, and the rider pays $10, the amount of overage of $7.50 is added to the rider's Pay balance.

Processing Smart Card Payments in the Pay Mobile Driver Application

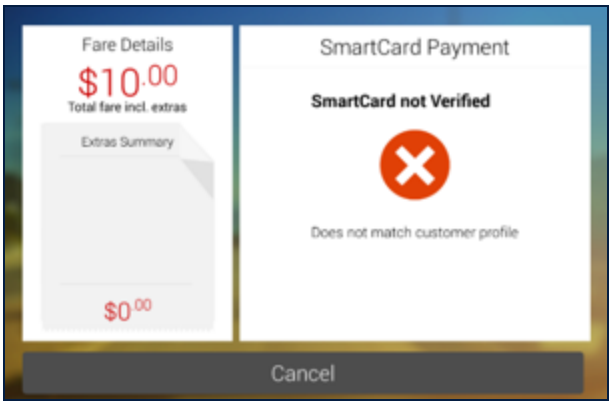
If a rider boards a vehicle and wants to pay using their registered smartcard, the driver will process the payment in the following way from their tablet:

1. Tap the **SmartCard** button under the Payment Types menu.
2. Tap a valid smartcard to the card reader. The card reader beeps indicating the card has been read.
3. The tablet displays a green icon indicating funds were deducted from the rider's Pay account, and the payment was accepted.



Processing Unverified Smartcard Payments in the Pay Mobile Driver Application

If a rider boards a vehicle with a smartcard that is not registered, the system will recognize this as an invalid card. The tablet displays a red icon indicating there is not enough of funds in the account, and a payment cannot be processed at this time.

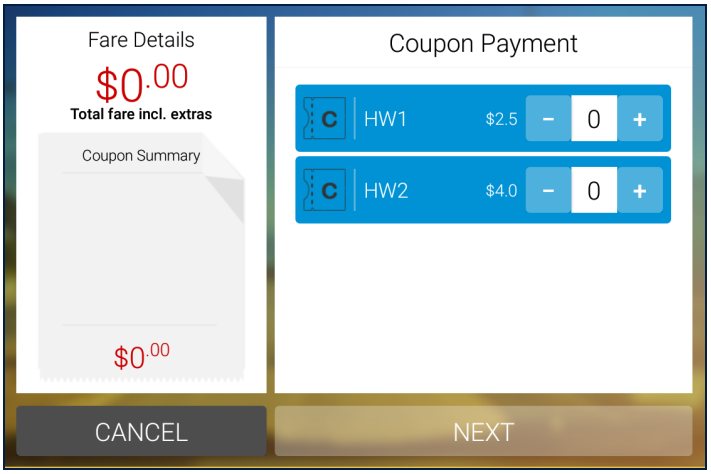


Tap **Cancel** to cancel the transaction and return to the main screen. You can then process another valid payment type from the rider, or make other arrangements with the rider as per your agency's policies.

Processing Voucher/Coupon Payments in the Pay Mobile Driver Application

Some agencies may allow riders to pay via vouchers or coupons. If a rider boards a vehicle and wants to pay using a coupon, the driver follows these steps:

1. Access **RMPay** using the workflow described in the How to Access the RMPay Mobile Driver Application section.
2. Tap **Coupon** in the Payment Types list. The Coupon Payment screen appears.



3. Select the appropriate coupon type and number.
4. Tap **Next**. The rider's fare decreases based on the coupon type. The remaining balance due, if any, is displayed.

Processing a No Pay Payment in the Pay Mobile Driver Application

If a rider boards a vehicle and cannot pay their fare for whatever reason:

1. Tap the **No Pay** button under the Payment Types menu.
2. Select the reason for the No Pay payment from the drop-down menu.
3. Tap **Next**.
4. Tap **Finish**.

Processing Cell/QR Code Payments

Some agencies may allow riders to pay via digital coupons or QR codes. If and when this feature becomes available, instructions will appear in a future version of the Pay User Guide.

Requirements and Configuration

This section provides a list and brief description software and hardware requirements for the PayRider Mobile Application, as well as instructions for configuring these components.

Hardware Requirements

This section provides a list and brief description of in-vehicle hardware requirements for the Pay Rider Mobile Application. For instructions on hardware installation, please refer to the RMPay Hardware Installation Guide.

- UART (Universal Asynchronous Receiver/Transmitter) - device used for asynchronous serial communication; UART connects to the tablet's hotspot
- SmartCard Reader - a data input device that customers use to scan their Pay SmartCards to make payments; the SmartCard reader is connected to the UART
- Tablet (Apple or Android; see System Requirements)

System Requirements

RouteMatch's Pay Mobile Driver Application software requires the following:

- RMMobile version 3.1.00 or higher
- Android version 4.4.0 or higher
- RMPay version 1.0 or higher

System Configurations

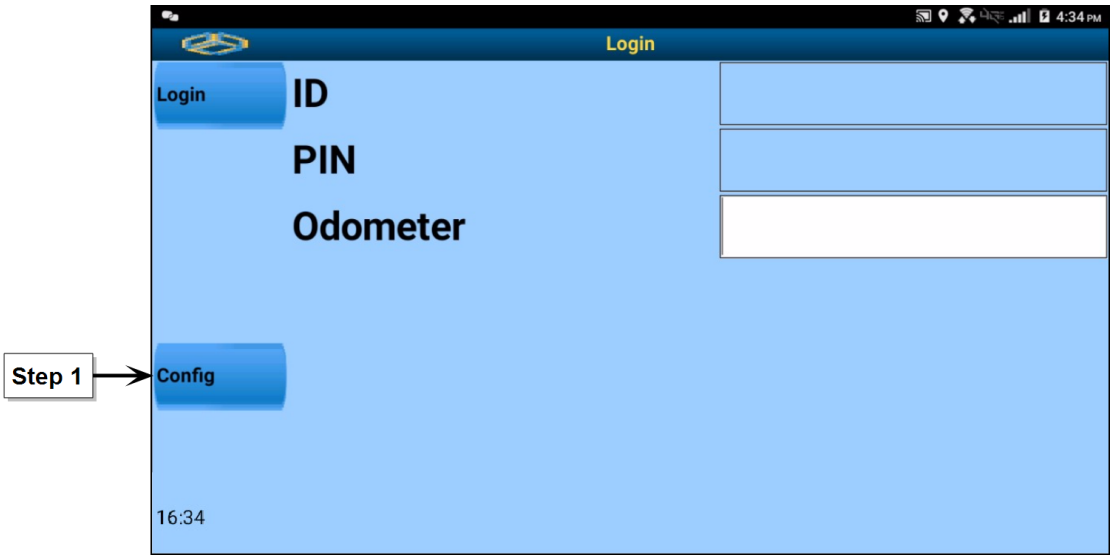
The following should take place for the Pay Mobile Driver Application to function:

- RMMobile configuration to enable Pay Mobile Driver Application integration
- RMGate configuration
- Hotspot configuration
- UART setup and configuration
- UART verification and security
- RMDriver Pay installation
- Dynamic IP configuration
- Enabling unknown sources

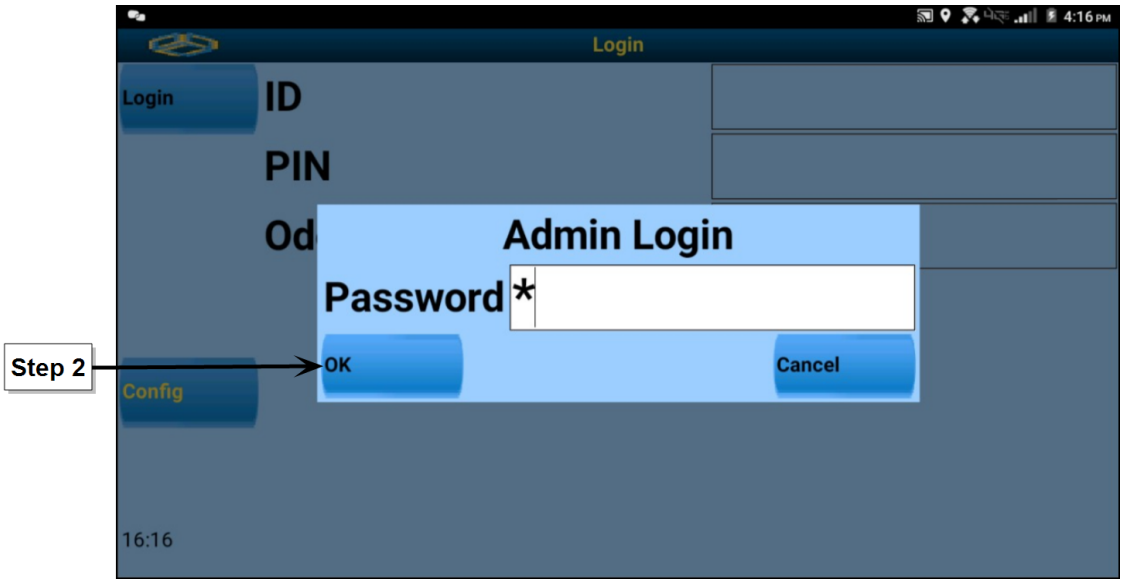
RMMobile Configuration

Follow these steps to configure the Pay Mobile Driver Application integration in RMMobile:

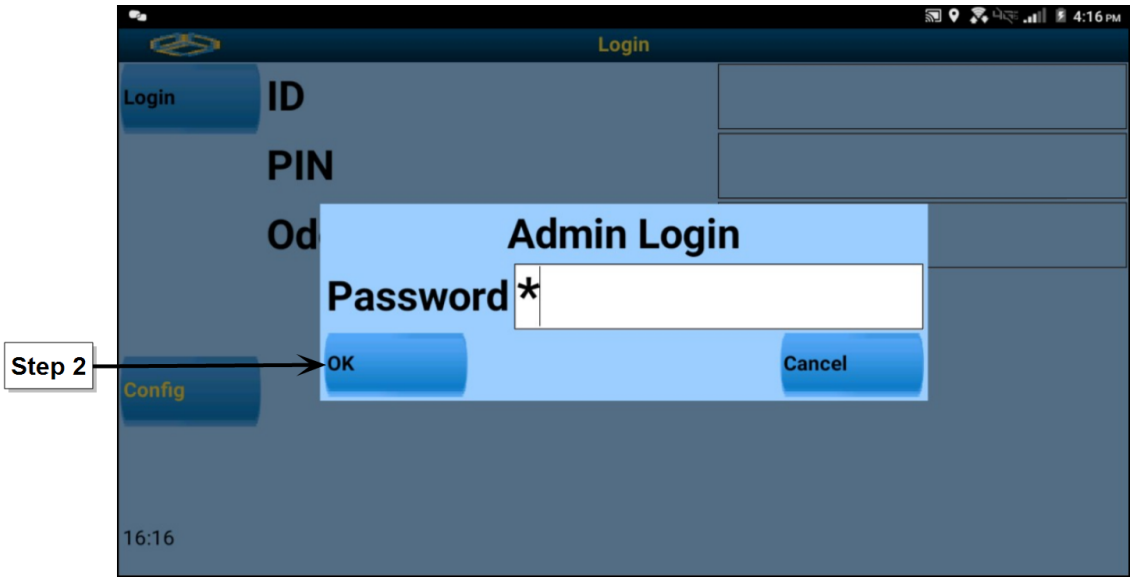
1. From the Login screen, tap **Config**.



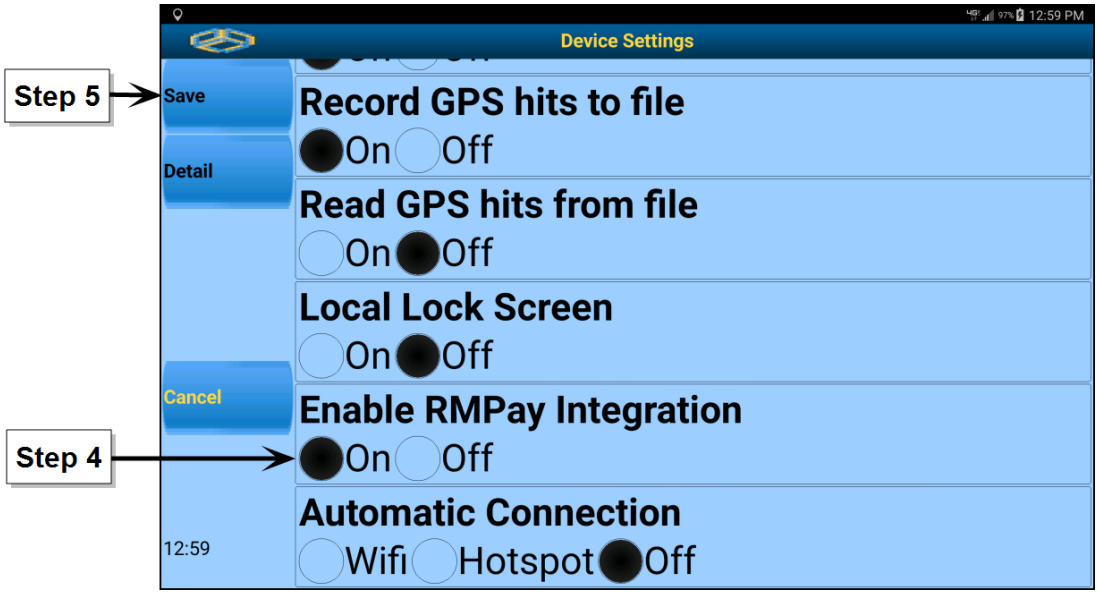
2. Log in using your credentials and tap **OK**.



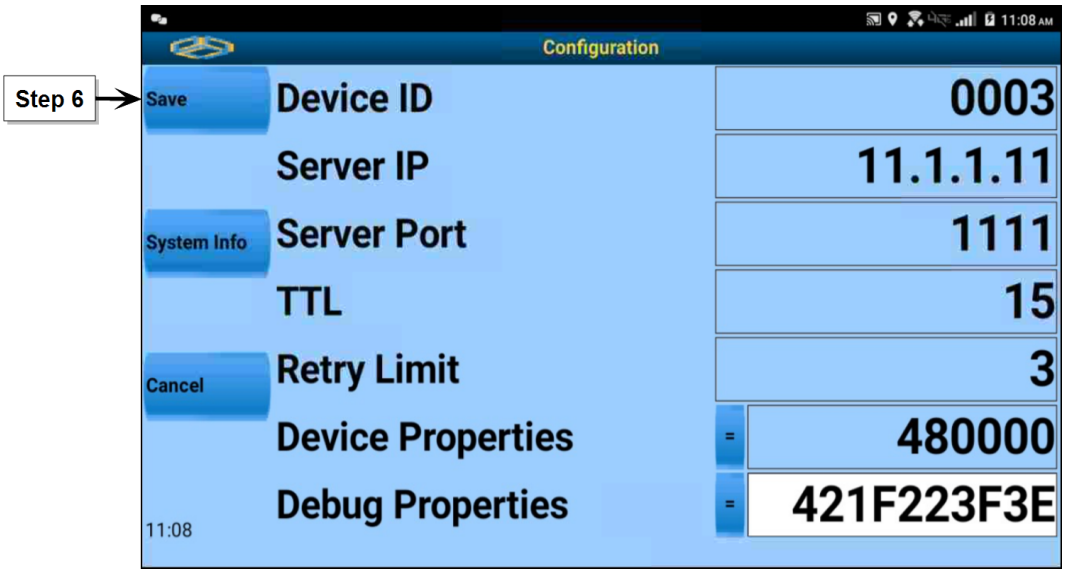
3. On the Configuration screen, tap the **Device Properties "=" sign**.



4. On the Device Settings screen, scroll down until you see Enable RMPay Integration. Then, tap **On** to enable RMPay Integration.
5. Tap **Save**.



6. When you are back on the Configuration screen, tap **Save** again to go back to the Login screen.



RMGate Configuration

To configure RMGate for Pay Mobile Driver Application functionality, ensure the following:

1. The control attribute for para fare collection property file value for **PHONES.device.gateway.config.rmp.options** should include bit 200.

   This particular property setting is compatible with RMGate 6.4.00 or higher and RMMobile 3.1.00 or higher.

2. The Pay Mobile Driver Application sends fare types to the RouteMatch desktop app (or the dispatcher) for verification via RMMobile. In order for this path to work, RMGate should be configured for sub paytype.

   Sub paytype (or subtype) refers to the type of coupon the rider is using. It can include punch cards, 90 day cards, 30 day cards, and more. Subtype also refers to options such as No Pay (i.e, invoice, no cash, and more).

   The following is an example of the Mobile Driver Application configuration for sub paytypes that must be enabled in RMGate for this feature:

   > **Note:** The following rules apply when inserting sub paytypes:
   >
   > - Format for Mobile Driver Application sub paytypes require a semicolon. For example, **No Pay;nocash**.
   > - There should be no spaces before or after the semicolon or within the subtype. For example, **Coupon;PunchCard** instead of Coupon;Punch Card.
   > - The first subtype must always be "unknown" in case one cannot find the subtype.

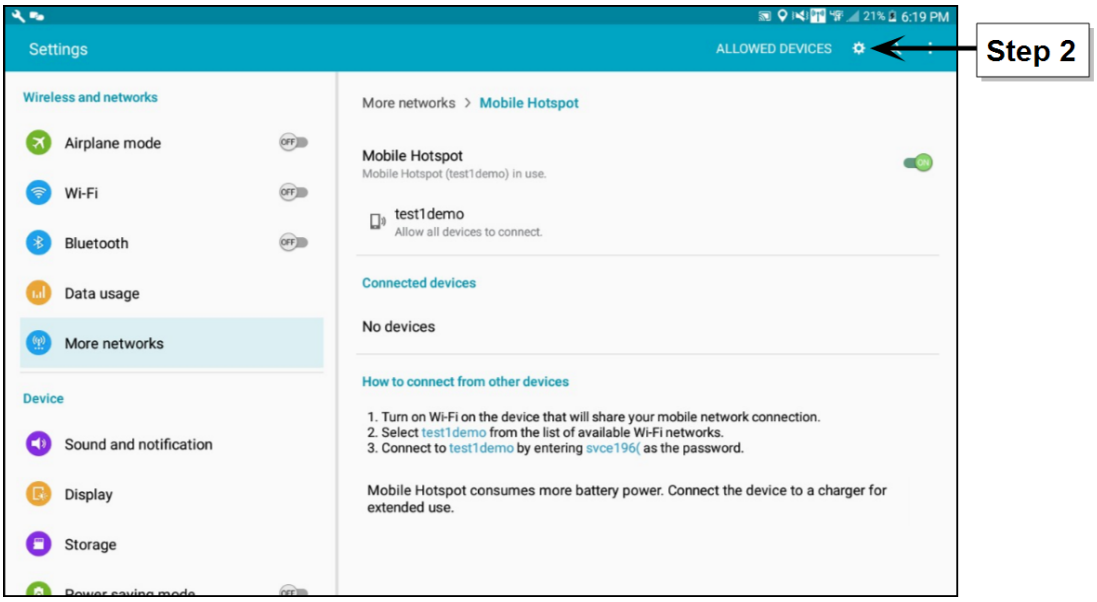
   - PHONES.payment.type.0 = Unknown
   - PHONES.payment.type.1 = Cash
   - PHONES.payment.type.2 = NoPay;invoice
   - PHONES.payment.type.3 = RMPay
   - PHONES.payment.type.4 = SmartCard
   - PHONES.payment.type.5 = Coupon;Coupon
   - PHONES.payment.type.6 = Coupon;PunchCard

   Additionally, ensure that the subtypes in RMGate match the subtypes that come from the Mobile Driver Application.

Hotspot Configuration

You need to configure a hotspot on your tablet to be able to connect the UART to the tablet. To configure a hotspot, follow these steps:

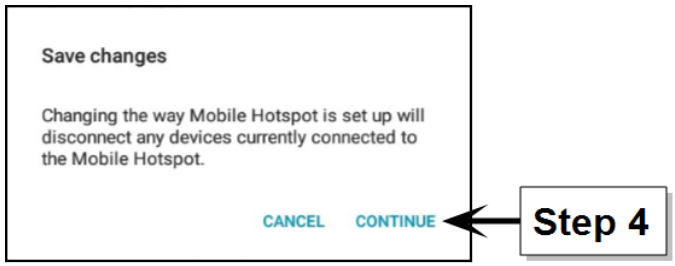
1. On your tablet, go to **Settings** > **More networks** > **Mobile Hotspot**.
2. Tap on the gear icon to configure mobile hotspot. The Configure Mobile Hotspot window opens.



3. Create/enter your Network SSID and Password here. Then, tap **Save**. The Save Changes dialogue box opens.

> **Note:** Make sure to record the credentials in accordance with Routematch policy.

4. Tap **Continue**. Your tablet is now connected to your newly created hotspot.

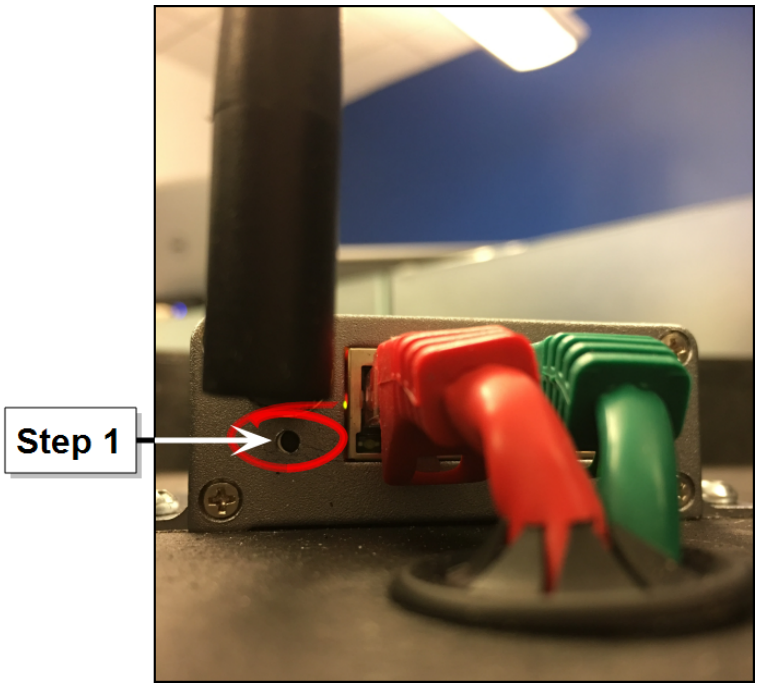


Connecting the UART

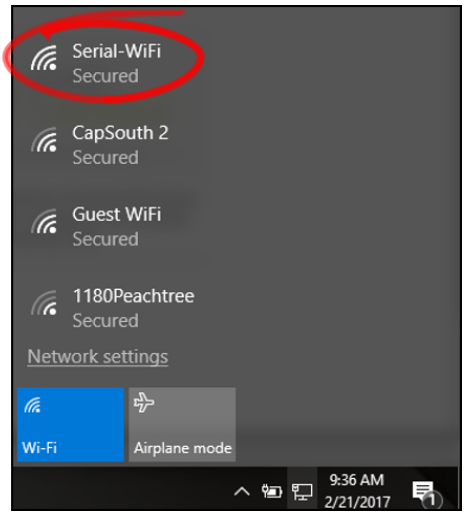
To set up the UART, you need an Ethernet cable, a laptop computer, and the UART. Follow these steps to complete the UART set up:

1. If this is the first use of the UART device, you can skip to Step 2.

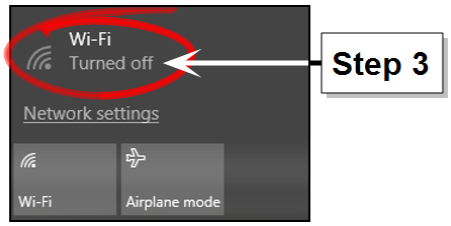
   If it's not the first use, you need to reset the device. To do so, hold down the reset button on the UART for 30 seconds. The reset button is located right below the antenna.



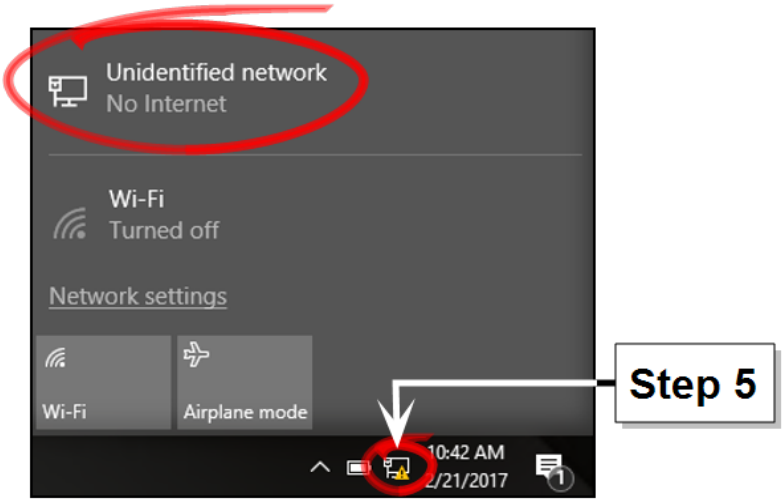
2. On your laptop computer, in the system tray on the task bar, verify that you see the Serial-Wifi in your networks.



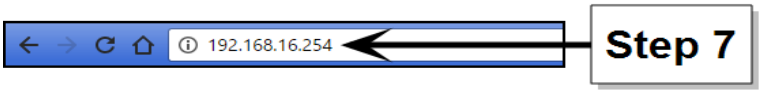
3. Disable the Wi-Fi on the computer.



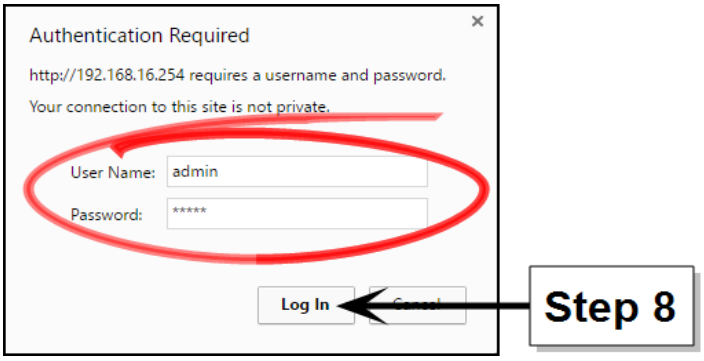
4. Connect the one end of the Ethernet cable to the LAN port on the UART and the other end to the Ethernet port on the computer.
5. To verify the Ethernet connection, click the Network Connectivity icon from the system tray. The network status should say Unidentified network, No Internet.



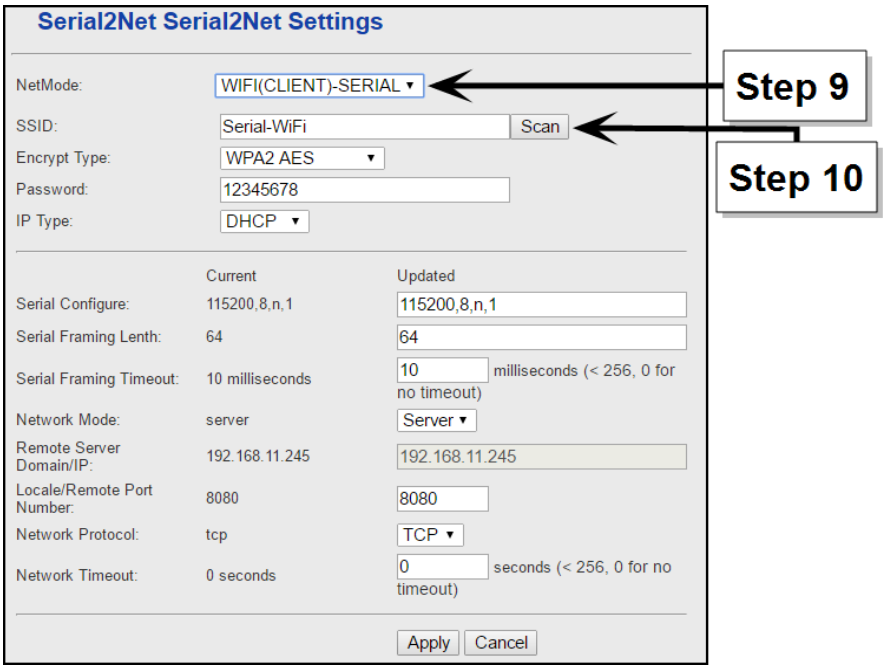
6. Next, you may need to configure your computer's IP settings to automatic. Please refer to the Dynamic IP Configuration section to do this.
7. Open a web browser (Chrome or Internet Explorer) and type in **192.168.16.254** in the address bar and press Enter. The Authentication Required dialog box opens.



8. Type in **admin** (lower cased) for both User Name and Password and click on **Log In**. The UART-WIFI-ETH settings page opens.



9. For NetMode, select **WIFI(CLIENT)-SERIAL** from the drop down menu.
10. Click on the **Scan** button to scan for the desired SSID.



11. On the next page, you see a list of SSIDs. Find the desired SSID and click the radio button next to it to select it. Then, click on the **Apply** button.

> **Note:** If you don't see the desired SSID, then click on the **Rescan** button. Keep rescanning until you see your SSID.

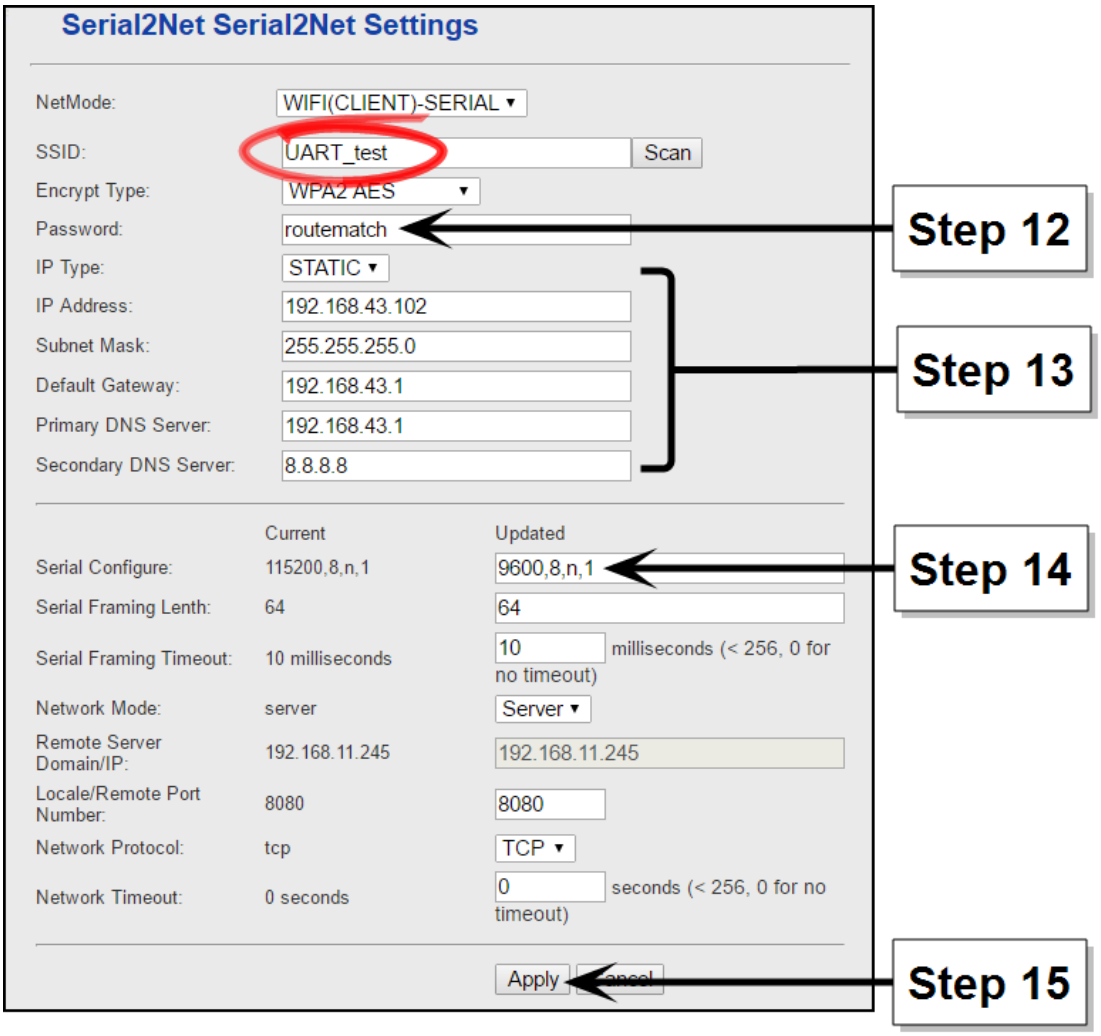
12. Applying your SSID fills in the SSID field on the Settings page. Next, type in the correct password in the Password field.

13. Select **STATIC** from drop down menu for IP Type. This will generate five additional fields (IP Address, Subnet Mask, Default Gateway, Primary DNS Server, and Secondary DNS Server). Fill these fields with the information below:

    - IP Address: **192.168.43.102**
    - Subnet Mask: **255.255.255.0**
    - Default Gateway: **192.168.43.1**
    - Primary DNS Server: **192.168.43.1**
    - Leave the Secondary DNS Server field as is

> **Note:** These values are compatible when connecting to most Samsung hotspots.

14. Update the Serial Configure field to: **9600,8,n,1**. Leave rest of the fields as they are.
15. Click **Apply**. It takes about 30 seconds for the UART to update.

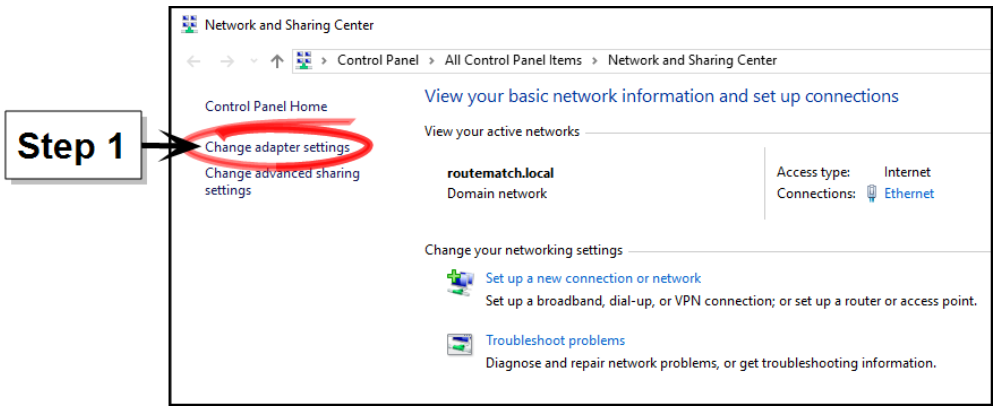


16. To verify that the settings are applied, disconnect the Ethernet cable, enable the Wi-Fi, and connect to the desired hotspot.

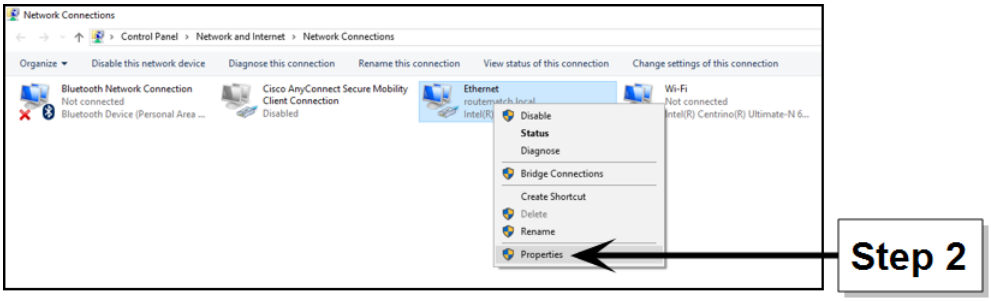
Dynamic IP Configuration

Follow these steps to set dynamic IP on your computer:

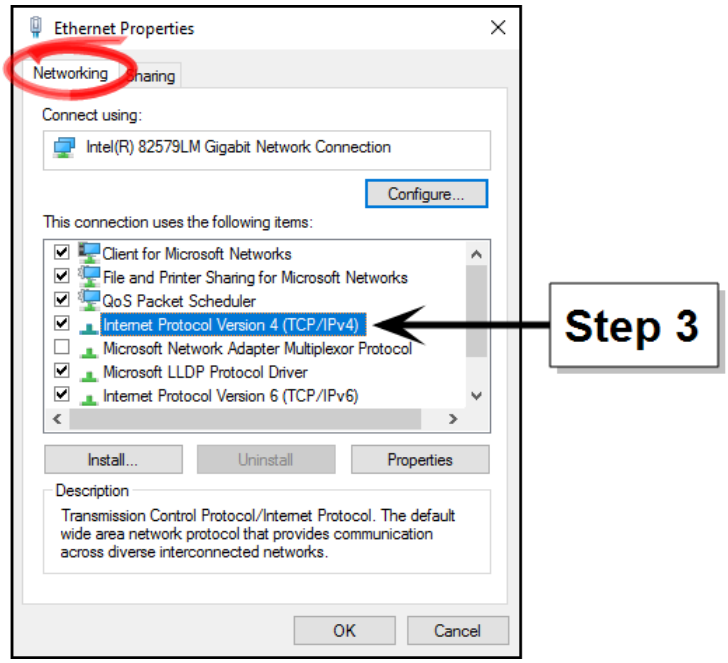
1. Open the Network and Sharing Center on your computer. Click on **Change adapter settings** from the left navigation menu. The Network Connections window opens.



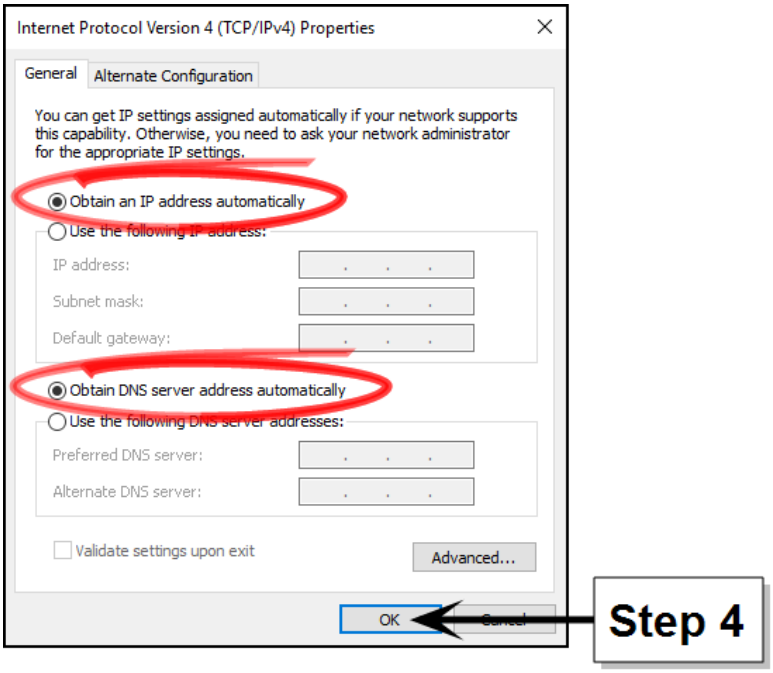
2. From the Network Connections window, right click on **Ethernet** and then click on **Properties**. The Ethernet Properties window opens.



3. From the Ethernet Properties window, under the Networking tab, double click on Internet Protocol Version 4 (TCP/IPv4), which opens its Properties window.



4. From the IPv4 Properties window, set IP address and DNS server address to be obtained automatically and click **OK**.

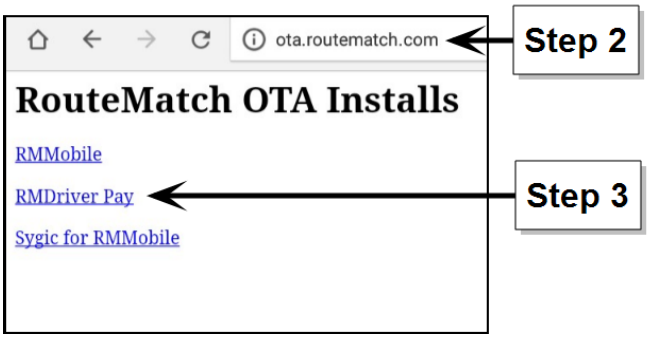


5. Click **OK** on the Ethernet Properties window and close out the rest of the windows you opened.

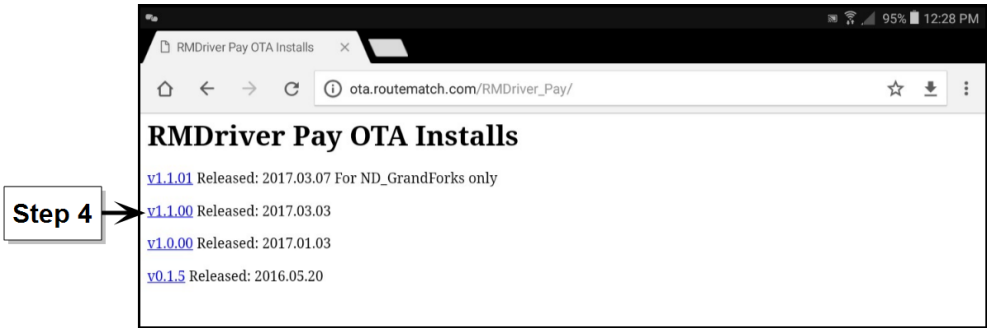
Installing RMDriver Pay

Follow these steps to download and install the Pay Mobile Driver Application on your tablet:

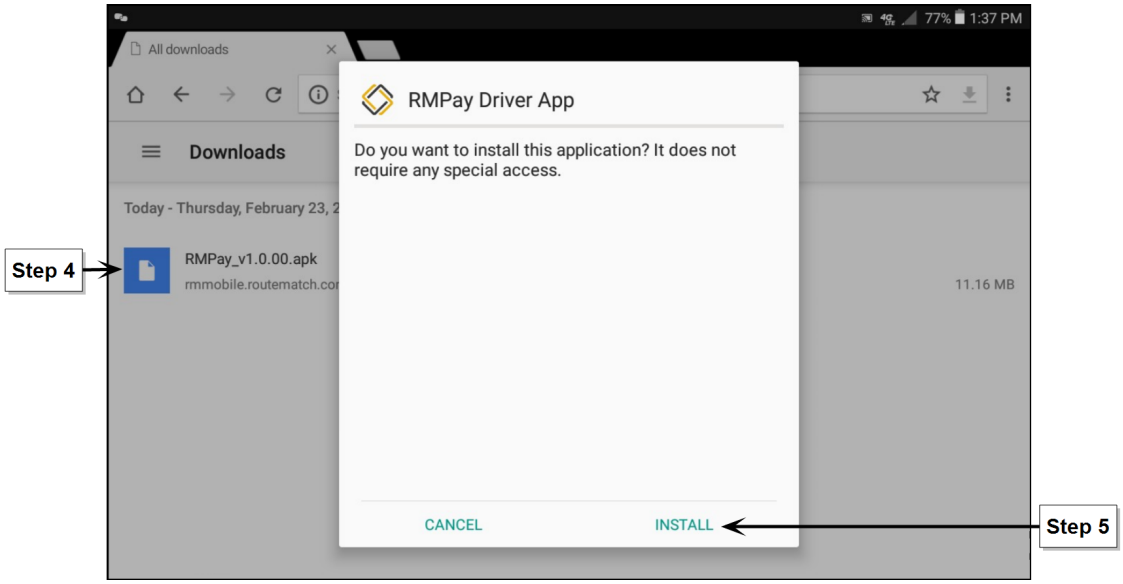
1. Before you can download and install the Pay Mobile Driver Application on your tablet, please ensure that downloading from unknown sources is enabled on your tablet.
2. On your tablet, open a web browser and type in **ota.routematch.com** in the address bar and press Enter. The RouteMatch OTA Installs page opens.
3. Tap on the **RMDriver Pay** link. The RMDriver Pay OTA Installs page opens.



4. Click on the latest version. The app download begins.



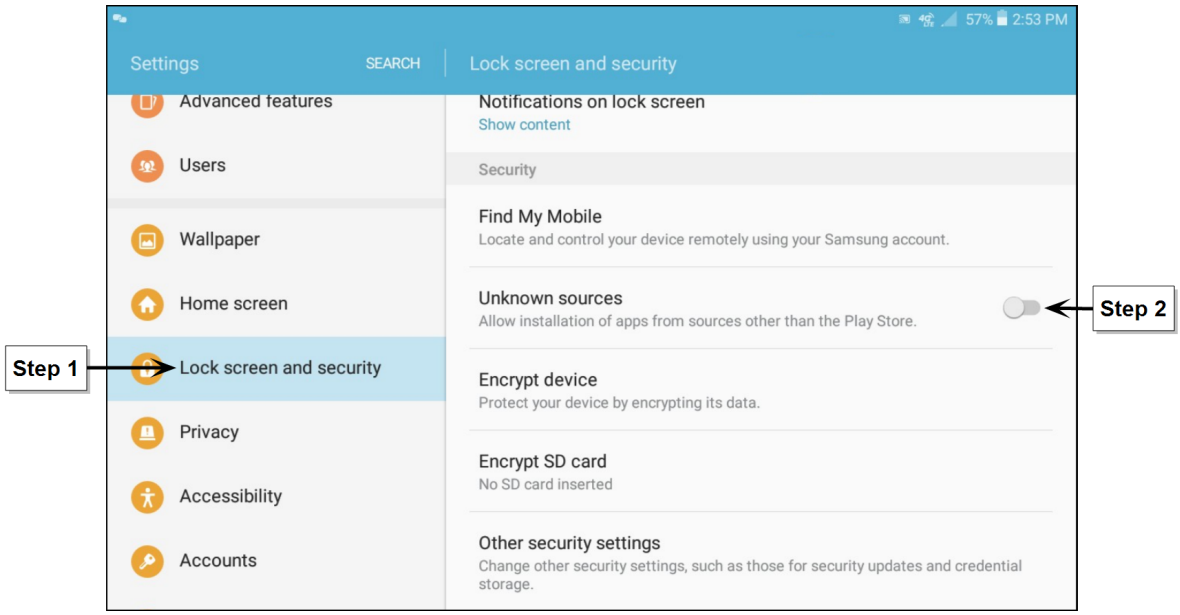
5. Open the RMDriver app from the tablet's Downloads and tap the RMPay download file. The installation dialog box opens.
6. Tap **Install**. The app installation begins. When installation is complete, you are ready to set up the Pay Mobile Driver Application.



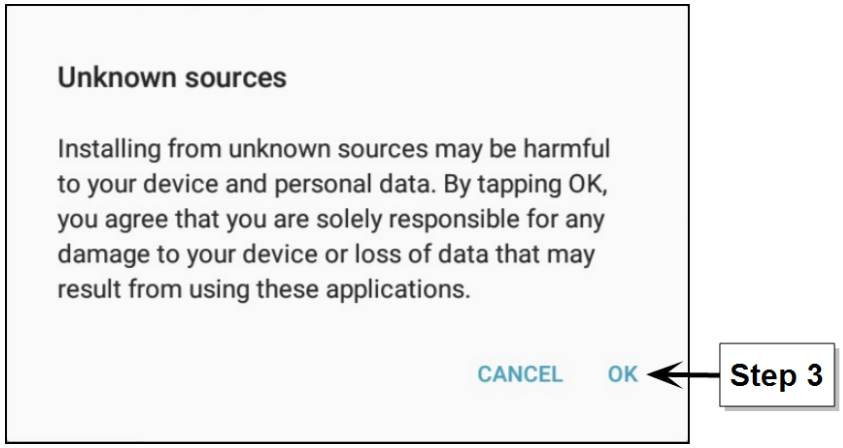
Enabling Unknown Sources

Follow these steps to enable unknown sources to allow Routematch app installs:

1. From your tablet settings, go to **Lock screen and security** > **Unknown sources**.
2. Toggle on Unknown sources. The Unknown sources dialog box opens.



3. Tap **OK**. You have successfully enabled unknown sources.



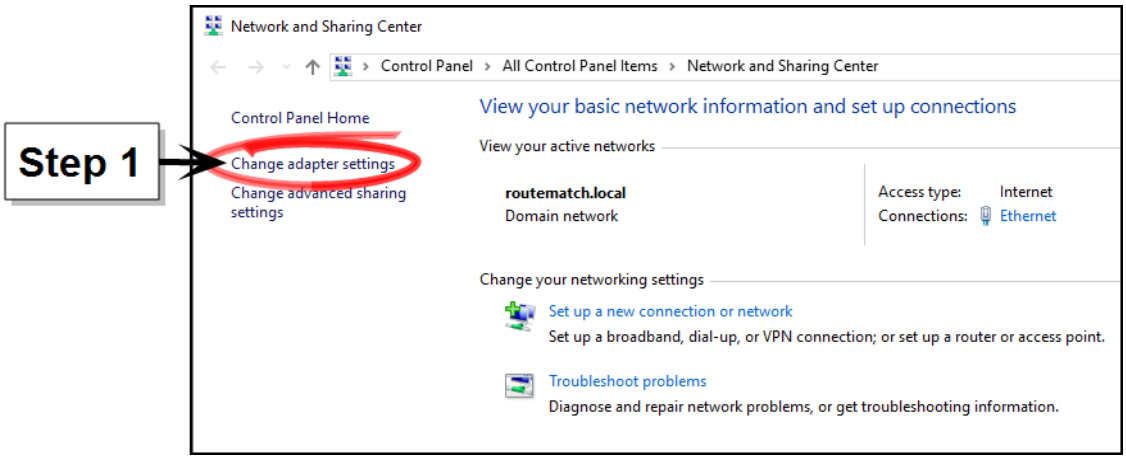
UART Verification and Security

After you complete the UART setup, you need to configure the UART, which involves verifying the settings and changing the password.

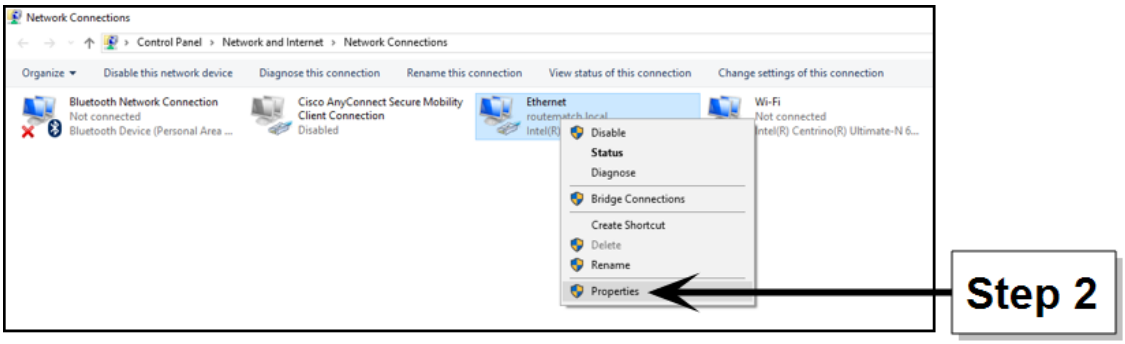
Verifying Settings

Follow these steps to set dynamic IP on your computer:

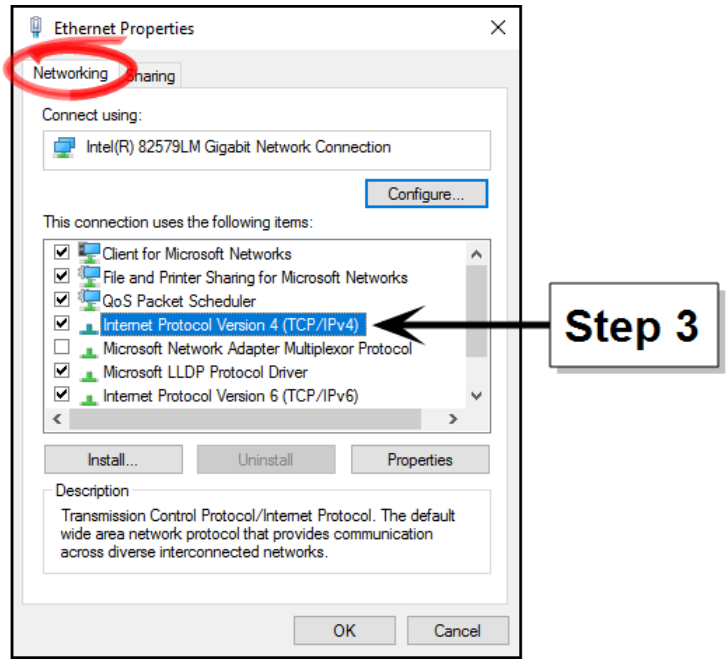
1. Open the Network and Sharing Center on your computer. Click on **Change adapter settings** from the left navigation menu. The Network Connections window opens.



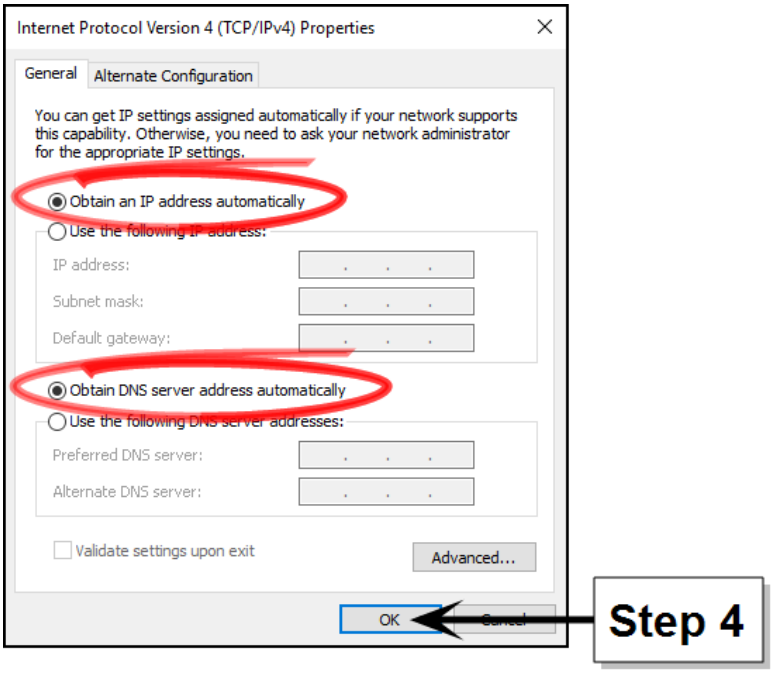
2. From the Network Connections window, right click on **Ethernet** and then click on **Properties**. The Ethernet Properties window opens.



3. From the Ethernet Properties window, under the Networking tab, double click on Internet Protocol Version 4 (TCP/IPv4), which opens its Properties window.



4. From the IPv4 Properties window, set IP address and DNS server address to be obtained automatically and click **OK**.

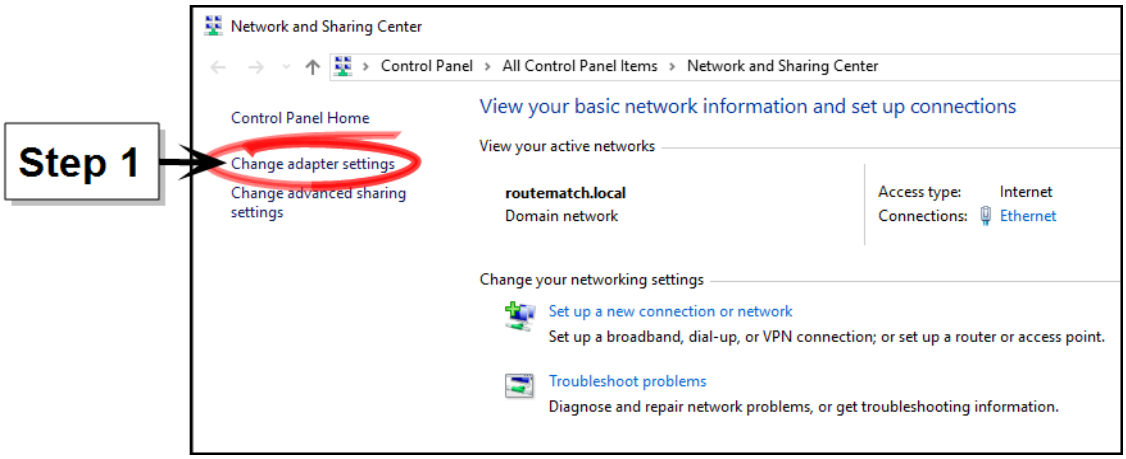


5. Click **OK** on the Ethernet Properties window and close out the rest of the windows you opened.

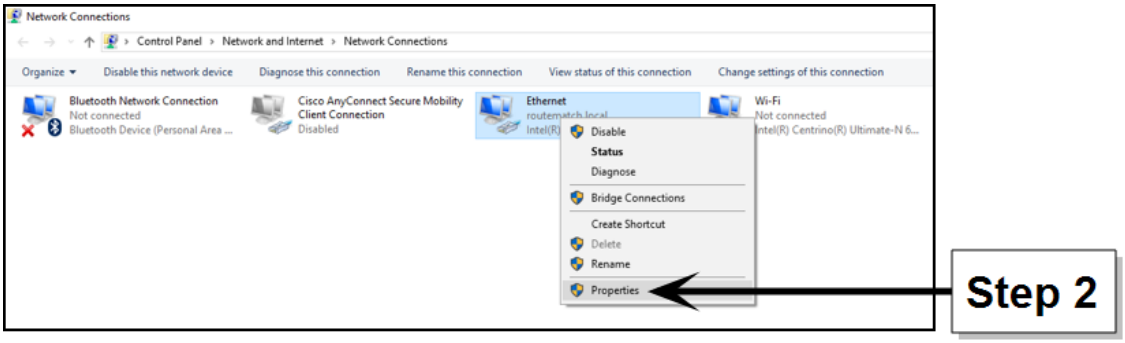
Changing Your Password

Follow these steps to set dynamic IP on your computer:

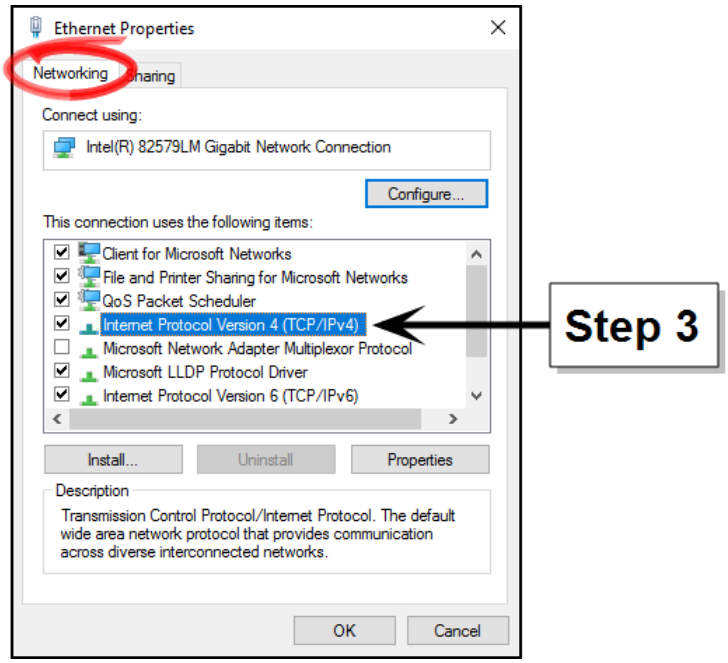
1. Open the Network and Sharing Center on your computer. Click on **Change adapter settings** from the left navigation menu. The Network Connections window opens.



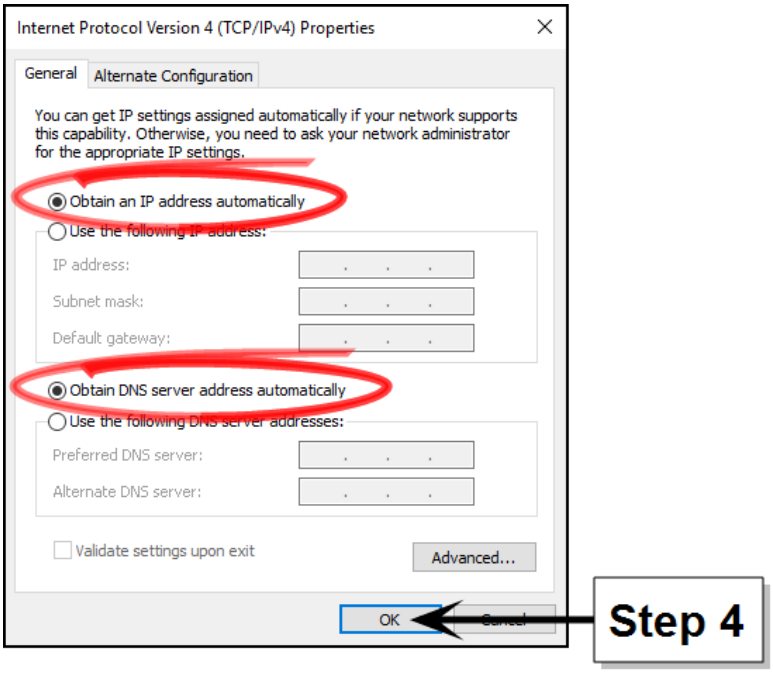
2. From the Network Connections window, right click on **Ethernet** and then click on **Properties**. The Ethernet Properties window opens.



3. From the Ethernet Properties window, under the Networking tab, double click on Internet Protocol Version 4 (TCP/IPv4), which opens its Properties window.



4. From the IPv4 Properties window, set IP address and DNS server address to be obtained automatically and click **OK**.



5. Click **OK** on the Ethernet Properties window and close out the rest of the windows you opened.

CHAPTER 7

Hand-Held Validator Overview

The Hand-Held Validator enables drivers to walk to a rider's doorstep and process payments using several different payment options including cash, tokens, or trail pass cards. Using the validator, drivers can process group payments as well as multi-fare payments.

Key Features

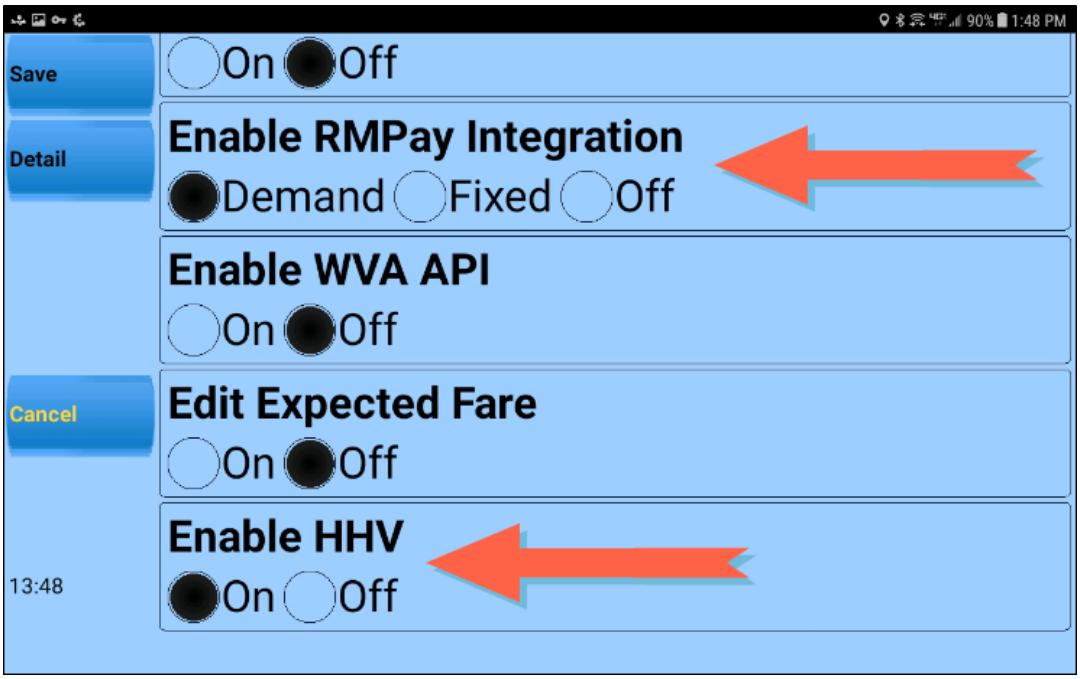
- Android based
- Includes an optical scanner, RF reader, and keypad
- Wireless (hotspot)

Configuration & Setup

Before you can use the HHV application, you must enable it in the RMMobile Device Settings. To enable the HHV application, tap **Config** on the main screen, enter the Admin password, tap the = sign for Device Properties, and scroll down to bottom.

Enable the two settings listed below and tap **Save**.

1. **Enable RMPay Integration (Demand)**.
2. **Enable HHV (On)**.



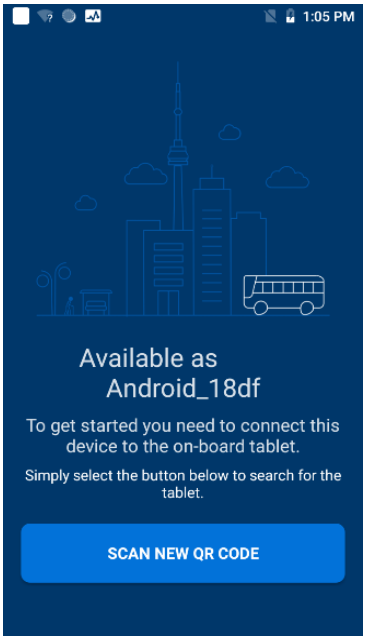
Establishing a Connection Between the Hand-Held Validator App and RMMobile

Before using the HHV application, a connection must be established between the HHV application on the MINI2 device and RMMobile on the tablet. Without a connection, you will not be able to accept payments using the HHV application.

To establish a connection:

1. When you first open the HHV application, the Routematch home screen displays.
2. Tap the **HHV PAY** icon in the top left corner of the screen.

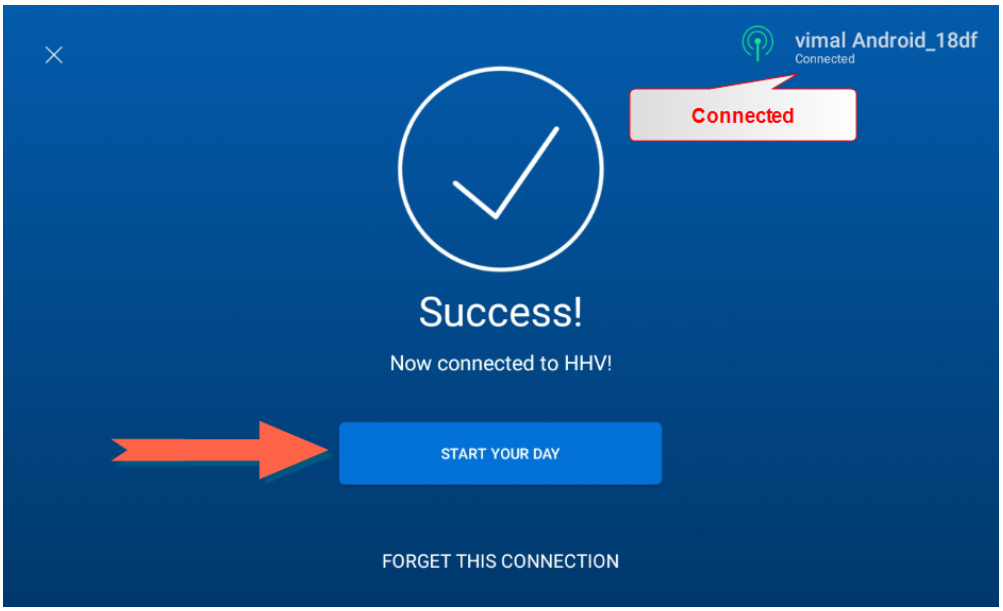
3. Tap **SCAN NEW QR CODE**.



4. Sign into RMMobile. The QR Code displays after the manifest loads. Scan the QR code

on the tablet using the HHV application. The red status symbol indicates that a connection has not been established yet.

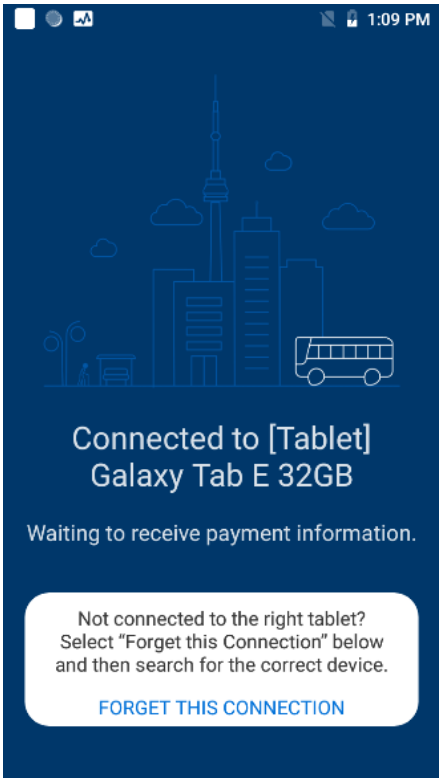
5. After the QR code is scanned, the connection is made between the tablet and the HHV application. The status symbol turns green and shows which device the Driver Pay application is connected to.



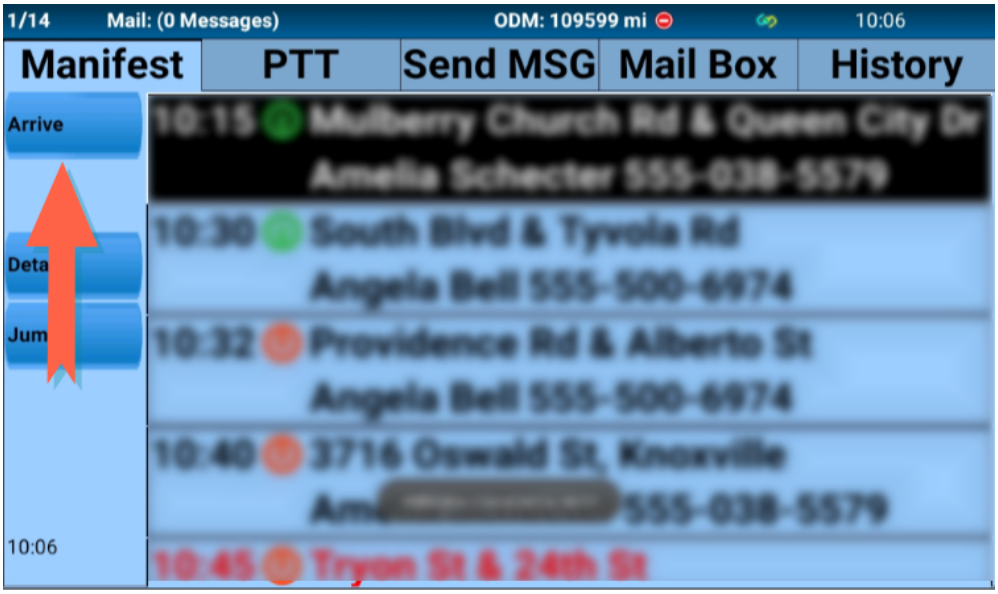
6. The first time a connection is made between the two devices, you will see the

START YOUR DAY button. Tap to begin.

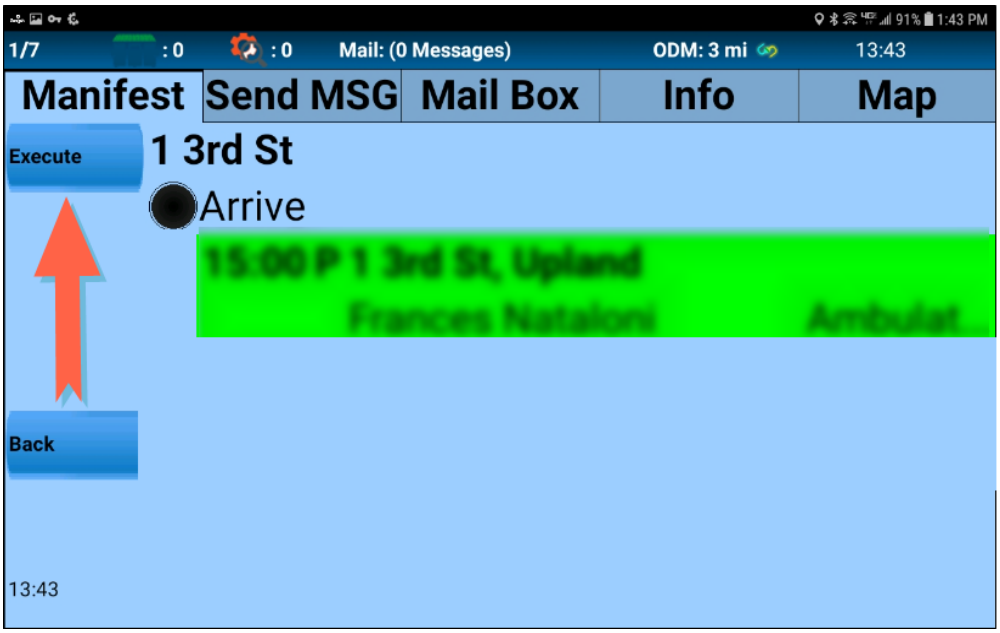
7. The HHV application is now connected to RMMobile, and a message displays that indicates which tablet it is connected to.



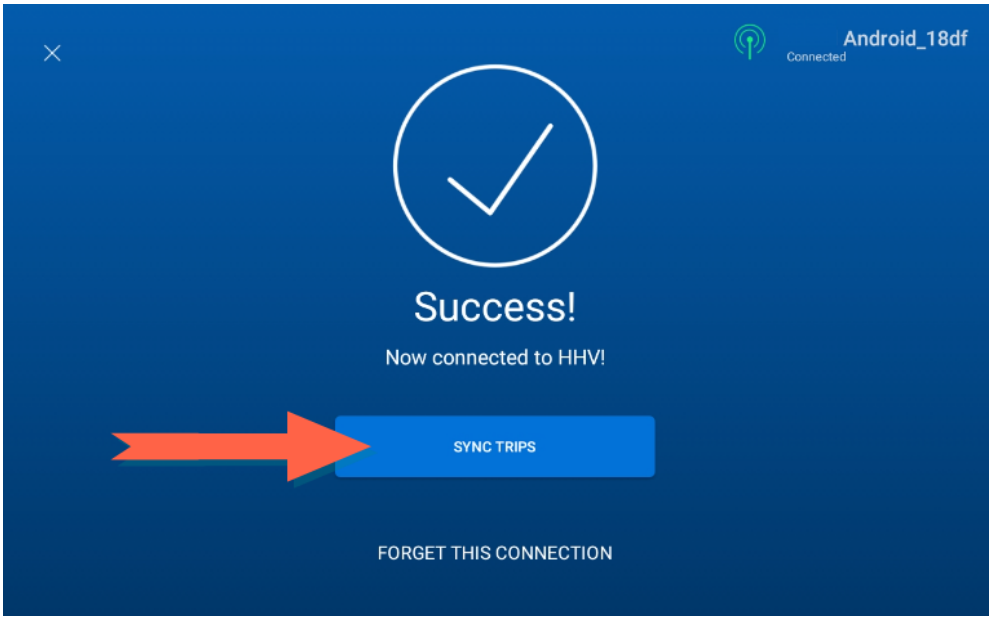
8. After you tap the **START YOUR DAY** button, you will be redirected back to the RMMobile manifest. Tap **Arrive** when you arrive at the pickup location.



9. Tap **Execute** to complete the trip.

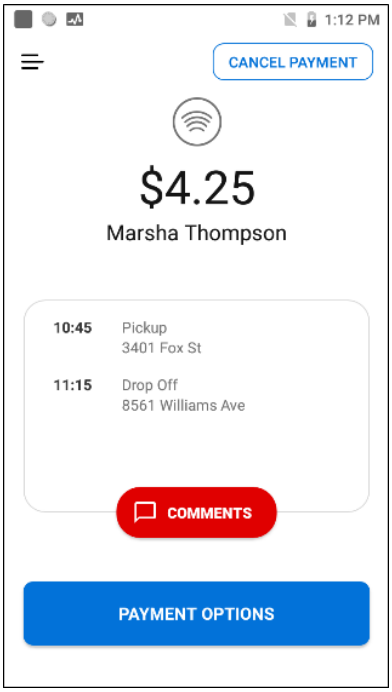


10. The **SYNC TRIPS** screen displays. To see the payment screen on the HHV application, tap **SYNC TRIPS**.



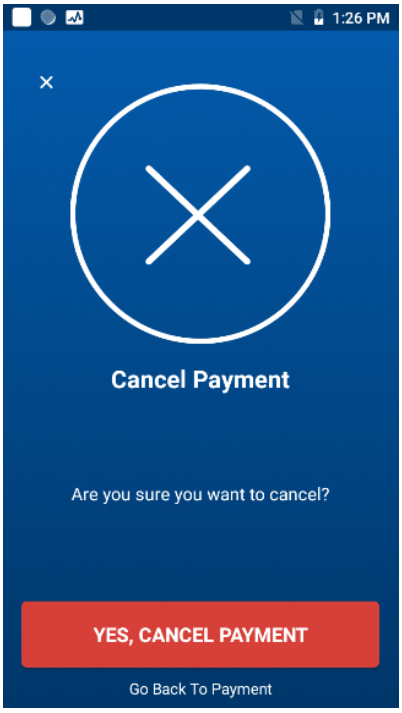
Note: You will only see the SYNC TRIPS option at pickup, not at drop-off.

11. After you tap sync trips, the payment screen displays on the HHV application.



> **Note:** The HHV application displays the expected fare amount, the customer's name, pickup time and address, drop off time and address, comments, attendant or guest information, and payment options.

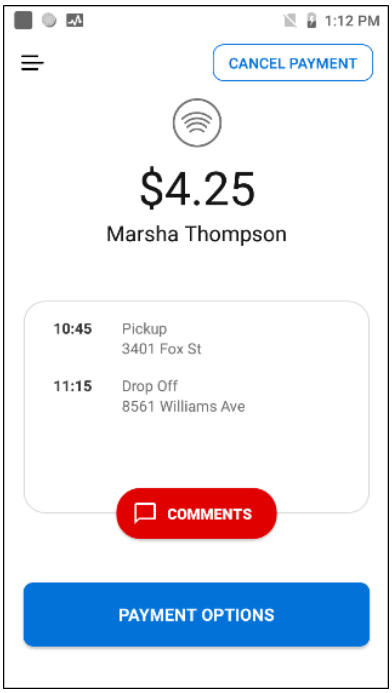
12. If you wish to cancel the payment, tap the **Cancel Payment** button in the top right corner, and confirm that you wish to cancel the payment.



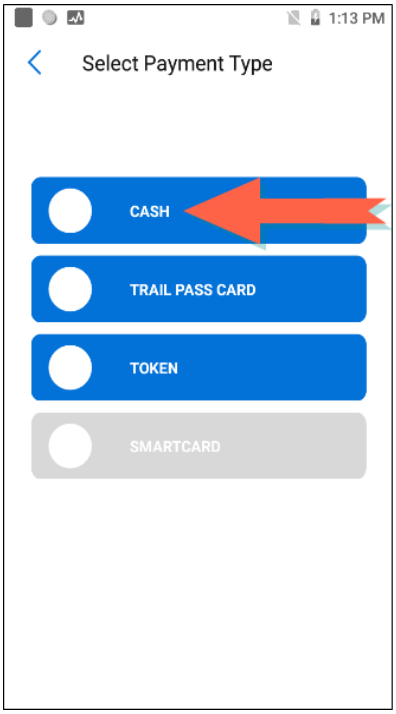
Single Payment

To use a single fare type:

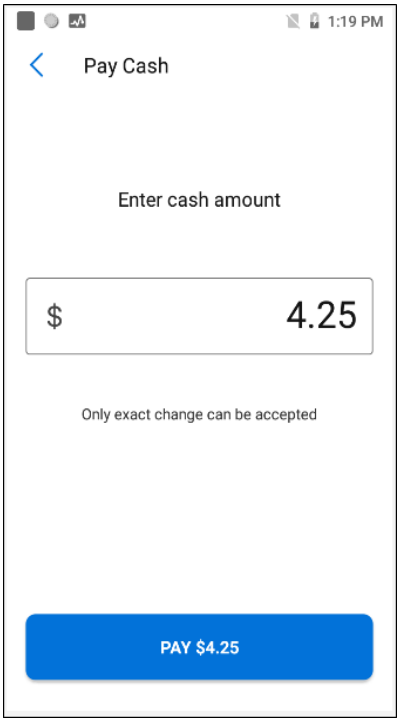
1. [**CASH**] Select the rider and tap the **Payment Options** button.



2. Tap the **Cash** button.



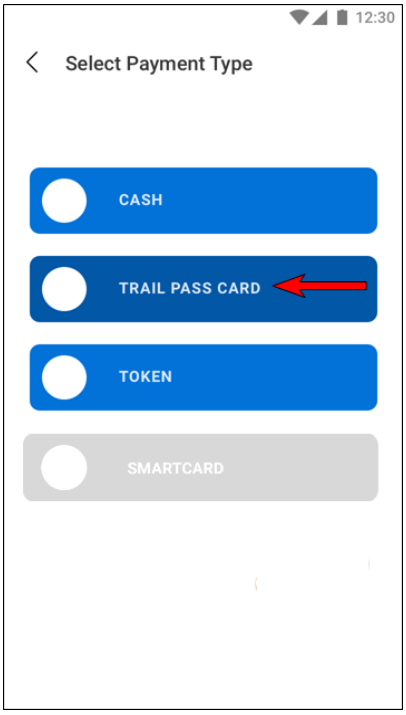
3. The expected fare amount will display.



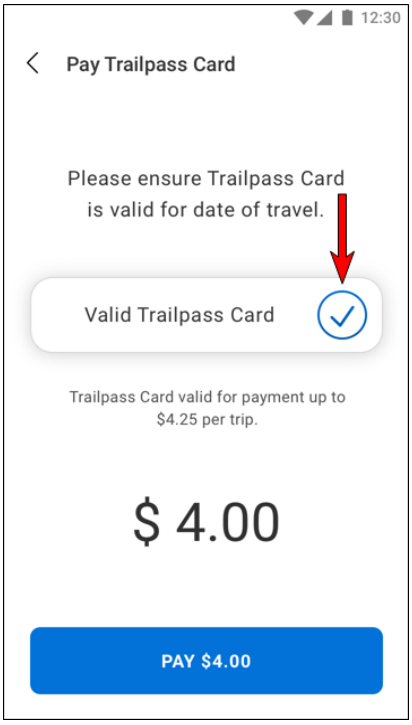
4. If the rider has the exact cash amount, tap **Pay $4.25**. The payment amount will be

deducted from the fare.

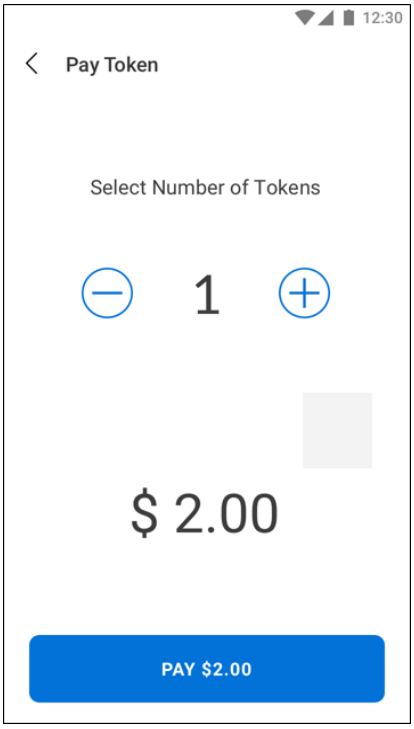
5. Tap **Complete Payment**. A success message displays when the payment is completed.
6. Tap **Finish**.
7. [**TRAIL PASS CARD**] Select the rider and click the **Payment Options** button.
8. Tap the **Trail Pass Card** button.



9. Select the **Valid Trailpass Card** option if the trailpass card is valid for the date of travel.



10. Tap **Pay $4.00**. The payment amount will be deducted from the fare.
11. [**TOKEN**] Select the rider and click the **Payment Options** button.
12. Tap the **Token** button.
13. Select the number of tokens.



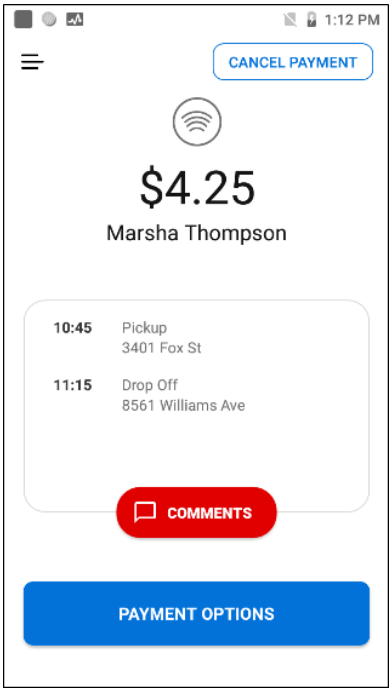
14. Tap **Pay $2.00**. The payment amount will be deducted from the fare.

Multi-Fare Payments

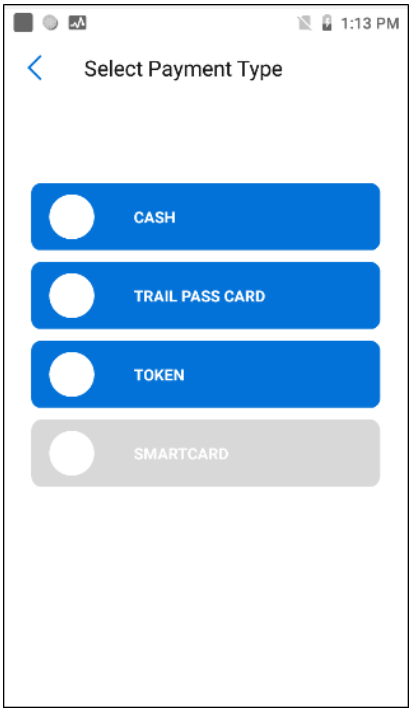
Riders can pay for their trip using multiple fare types. When multi-fare is used, each fare type is updated in dispatching in the Routematch application. The web portal is also updated with each fare type.

To use a multi-fare payment type:

1. Select the rider and tap the **Payment Options** button.



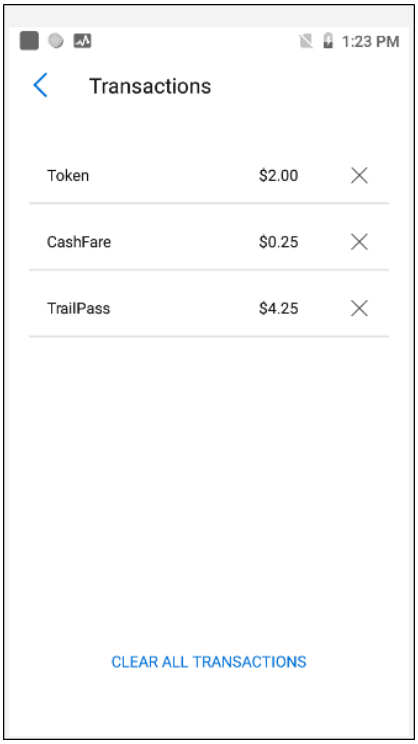
2. Select the fare types you wish to use from the following options: **Cash**, **Trail Pass Card**, or **Token**.



3. Specify the amount you wish to add for each fare type, and complete each payment accordingly.

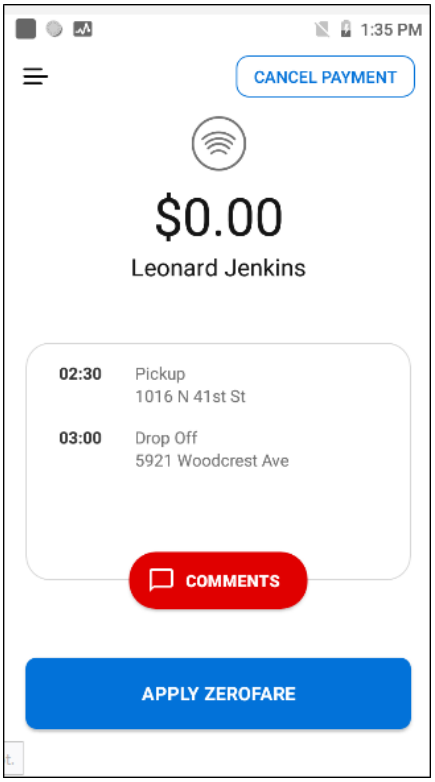
> **Note:** You must tap the Payment Options button each time you wish to use an additional fare type.

4. After you have added the amount for each fare type, you can view a summary of transactions. To clear a single transaction, tap the **X** next to the fare. Tap **Clear All Transactions** to clear all payments.


1:23 PM
Transactions
Token
$2.00
CashFare
$0.25
TrailPass
$4.25
CLEAR ALL TRANSACTIONS

ZeroFare Payment

If a rider's trip has been calculated as a ZeroFare, the rider does not need to pay. Tap **APPLY ZEROFARE** to complete the transaction.

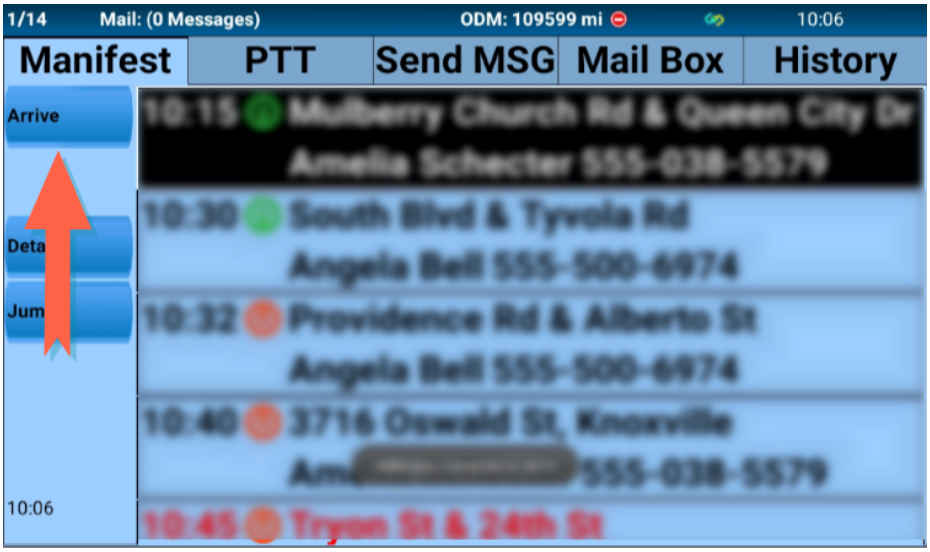


Group Payments

Group payments will be applied in the HHV application when there are two or more pickups for a stop.

To process a group payment:

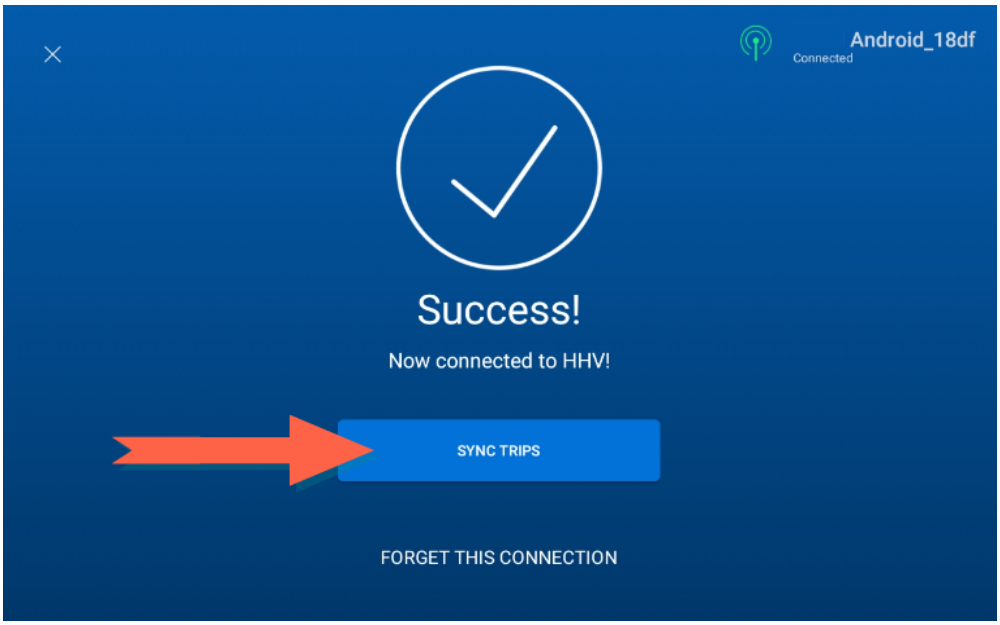
1. From the RMMobile manifest, tap **Arrive** when you arrive at the pickup location.



2. Tap **Execute** to complete the trip.

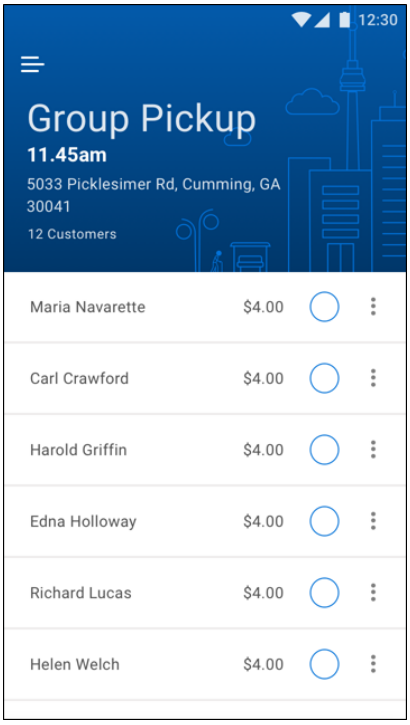
3. The **SYNC TRIPS** screen displays. To see the payment on the HHV application, tap

SYNC TRIPS. When you sync trips, you will see the payment screen display on the HHV application.

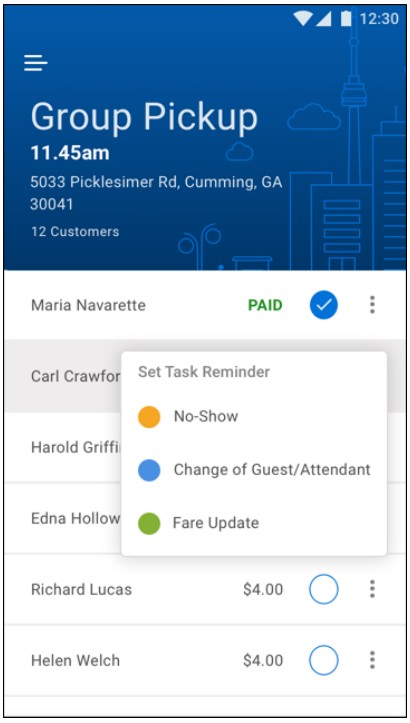


Note: You will only see the SYNC TRIPS option at pickup, not at drop-off.

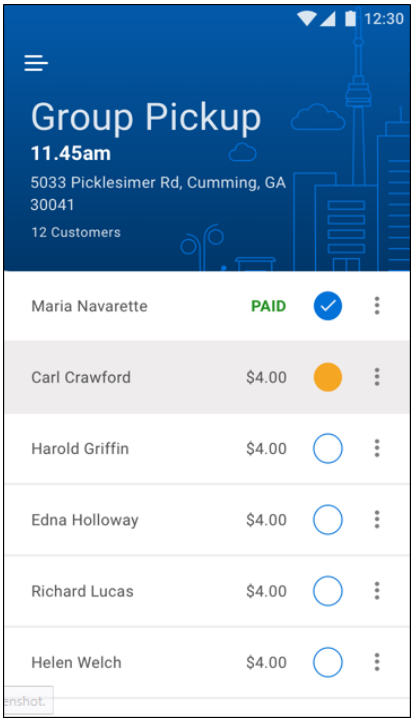
4. At this point, if there are two or more pickups for this stop, the HHV application will display the **Group Pickup** screen. Select each rider to complete the payment.



5. To update the trip status for each rider, tap the ellipsis button next to the rider's name and select a status update from the following options:
   - No-Show
   - Change of Guest/Attendant
   - Fare Update



6. The status updates will be updated accordingly with the corresponding status colors.



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