Woodforest Acceptance Solutions

SaleQuick Mobile

Executive Summary

SaleQuick Mobile is a WAS-supported, mobile-first payment solution for merchants that need to accept payments anywhere without the cost or complexity of a full POS system. It enables secure card-present acceptance on iOS and Android with supported readers, while optional features support invoicing, pay-by-link, text-to-pay, virtual terminal access, and recurring billing. Positioned between basic terminals and full POS platforms like Delta1st, SaleQuick Mobile allows merchants to start simple and expand payment workflows over time while remaining fully onboarded and supported by Woodforest Acceptance Solutions.

Strategic Role in the WAS Portfolio

SaleQuick Mobile fills a critical gap in the WAS portfolio for mobile, field-based, and event-driven payment scenarios where traditional terminals or POS systems are impractical. Rather than forcing small or early-stage merchants into operationally heavy systems, WAS leverages SaleQuick Mobile as a faster-to-deploy, lower-friction entry point.

Who It's Built For

- Field service and trade businesses collecting payment onsite
- Pop-up shops, vendors, and event-based sellers
- Delivery and remote payment collection use cases
- Early-stage or owner-operator businesses

Core Use Cases

- Getting Paid at the Job Site
- Mobile & Event Selling Without POS Overhead
- Remote & Card-Not-Present Payment Collection

Platform Differentiation

Unlike POS-centric platforms, SaleQuick Mobile focuses on payments first, not operational management. It does not attempt to replace inventory systems, staffing tools, or accounting platforms. Instead, it delivers reliable mobile acceptance paired with optional remote payment tools in a cloud-based, PCI-compliant environment.

Partner & Merchant Value

For merchants, SaleQuick Mobile provides a simple, professional way to get paid anywhere, faster, without committing to a full POS too early. For partners, it offers a scalable, WAS-supported mobile solution that expands addressable use cases while keeping merchants anchored within the WAS ecosystem.

SaleQuick Mobile is not a POS—it's the right-sized mobile payments solution for businesses that move, grow, and get paid beyond the counter.

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1. Product Overview

What the Product Is

SaleQuick Mobile is a WAS-supported, mobile payment and lightweight commerce solution designed to help merchants securely accept payments anywhere without the cost or complexity of a full point-of-sale system. It combines a mobile card-present application, optional virtual payment tools, and integrated payment processing to support on-the-go, field-based, and event-driven transactions. Merchants can accept EMV, contactless, and swipe payments on iOS or Android devices using supported mobile card readers, with optional Pro features enabling virtual terminal access, invoicing, pay-by-link, text-to-pay, and recurring billing. Positioned intentionally within the WAS portfolio between basic terminals and full POS platforms like Delta1st, SaleQuick Mobile is sold as a mobile-first payments solution—not a full POS—and is best suited for field service providers, mobile professionals, pop-up and event merchants, delivery-based businesses, and early-stage companies. Offered in tiered Standard and Pro packages, it allows merchants to start simple, and scale as needed, while remaining fully supported by WAS for underwriting, onboarding, and merchant support.

Portfolio Strategy

Woodforest Acceptance Solutions selected SaleQuick Mobile to address mobile-first payment needs without forcing merchants into full POS platforms. Rather than building a proprietary mobile solution, WAS leverages SaleQuick to enable rapid deployment, reduced complexity, and coverage for field service, event, and mobile commerce use cases while retaining control of underwriting, pricing, support, and TSYS processor alignment. Positioned below Delta1st in the portfolio, SaleQuick Mobile serves as an entry point for mobile and early-stage merchants, allowing them to start with simple acceptance and expand over time as they grow within the WAS ecosystem.

Ideal Customer Profile (ICP)

SaleQuick Mobile works best for merchants who need simple, portable payment acceptance and do not require the operational depth of a full POS system. The key qualifying question is:

"Does this business primarily need to take payments anywhere rather than manage complex in-store operations?"

If yes, SaleQuick Mobile is very likely a strong fit.

- Small to Medium-sized businesses
    - Service & Field Services (HVAC, Plumbing, Landscaping, Cleaning Services, Home Repair, Trade Services)
    - Mobile & Event-Based Sellers (Pop-up shops, trade shows, vendors, food trucks, delivery-based businesses)
    - Professional & On-the-Go Services (Contractors, mobile technicians, personal services, appointment-based businesses)

Operational Characteristics

- Merchants who primarily need card-present payments in the field
- Merchants with occasional card-not-present needs (invoicing, pay-by-link, recurring billing via Pro)
- Single-operator or small teams with minimal staff
- Merchants not managing complex inventory or multi-lane environments

Size & Complexity Guidelines

- Typically, single location or mobile-only
- Limited user counts (owner-operator or small teams)
- Low to moderate ticket volumes
- No requirement for advanced inventory, employee permissions, or multi-location reporting

Vertical-by-Vertical Breakdown

Service / Field Services (HVAC, Plumbing, Landscaping, Cleaning Services, Home Repair, Trade Services)

Pain Point: Service businesses need to take payments on-site, but counter-based POS systems and terminals don't work well in the field, forcing them to invoice later, chase payments, or manually key transactions.

SaleQuick Mobile Solves: SaleQuick Mobile allows technicians and service professionals to accept secure EMV and contactless payments on-site using a mobile device and card reader, with optional Pro tools for invoicing, pay-by-link, and recurring billing—reducing delays, manual follow-ups, and missed revenue.

Opening Line: "Once the job is done, are you able to take the payment right there—or are you still invoicing later and hoping the customer pays on time?"

Mobile & Event-Based Sellers (Pop-ups, Vendors, Trade Shows, Markets, Food & Merchandise Booths)

Pain Point: Mobile sellers need fast, portable checkout, but traditional POS systems are fixed, expensive, and impractical for temporary or changing locations.

SaleQuick Mobile Solves: SaleQuick Mobile turns a phone or tablet into a portable payment terminal, allowing merchants to accept payments anywhere with minimal setup—ideal for pop-up environments where speed, mobility, and reliability matter more than deep back-office features.

Opening Line: "When you're selling at events or pop-ups, do you need a full POS—or just a fast, reliable way to take payments anywhere you go?"

Professional & On-the-Go Services (Contractors, Consultants, Mobile Technicians, Appointment-Services)

Pain Point: Professionals often rely on manual invoicing, checks, or cash because their payment tools aren't flexible enough for mobile, appointment-based workflows.

SaleQuick Mobile Solves: With SaleQuick Mobile Pro, professionals can accept card-present payments on-site or send invoices and pay-by-link requests after the appointment, giving customers flexible ways to pay while improving cash flow and reducing administrative work.

Opening Line: "How are you getting paid today—on the spot, or after the fact once invoices finally get sent and settled?"

Delivery & Remote Payment Collection (Small Delivery Businesses, Remote Services, Repeat-Billing)

Pain Point: Businesses that take payments after delivery or service completion struggle with delayed payments, manual follow-ups, and inconsistent cash flow.

SaleQuick Mobile Solves: SaleQuick Mobile Pro supports virtual terminal access, recurring billing, and pay-by-link, enabling merchants to securely collect payments even when the customer isn't physically present—without moving to a full eCommerce or POS platform.

Opening Line: "When your customer isn't in front of you, how easy is it for them to pay—and how long does it usually take for the money to hit your account?"

Early-Stage & Simple Operations (Owner-Operators, Small Teams, New Businesses)

Pain Point: New or small businesses are often oversold complex POS systems with features they don't need, increasing cost, training effort, and operational friction.

SaleQuick Mobile Solves: SaleQuick Mobile provides a simple, payments - first starting point that covers core acceptance needs, with optional upgrades as the business grows—without locking merchants into expensive or overly complex systems.

Opening Line: "Are you just getting started and looking for a simple way to take payments—without paying for a POS system built for much larger businesses?"

NOT a good fit

- Full-service restaurants requiring table management, servers, coursing, reservations, and kitchen workflows
- Retailers with advanced or real-time inventory management needs, including omnichannel (online + instore) inventory synchronization
- Enterprise-level or large-scale businesses (national chains, big-box retailers, complex corporate reporting requirements)
- Multi-lane or multi-terminal retail environments with multiple cashiers and centralized location management
- Businesses seeking a single system of record for operations (inventory, employees, scheduling, purchasing, accounting integrations)

Primary Use Cases

Use Case #1

Problem: We complete jobs onsite but must invoice later or chase payments because our current system only works at a counter.

Feature: SaleQuick Mobile enables secure EMV, contactless, and swipe payments using a mobile device and supported card reader, allowing payments to be taken anywhere the work is performed.

Value: Merchants get paid immediately at the job site, reduce unpaid invoices, improve cash flow, and eliminate delays caused by post-service billing.

Use Case #2

Problem: We sell at pop-ups or events, but traditional POS systems are expensive, fixed, and difficult to move between locations.

Feature: SaleQuick Mobile turns a phone or tablet into a portable checkout solution with minimal setup, designed specifically for on-the-go and temporary selling environments.

Value: Merchants can accept payments anywhere, set up quickly, and operate without investing in full POS hardware—making events and pop-ups profitable and easy to manage.

Use Case #3

Problem: Customers are not always present to pay, and manually sending invoices or collecting payments later leads to delays and missed revenue.

Feature: SaleQuick Mobile Pro includes virtual terminal access, invoicing, pay-by-link, text-to-pay, and recurring billing capabilities.

Value: Merchants give customers flexible ways to pay while getting paid faster, reducing manual follow-ups and improving consistency of cash flow.

Use Case #4

Problem: We were sold a POS system with more features than we need, increasing cost, training effort, and operational complexity.

Feature: SaleQuick Mobile provides a payment first solution with tiered Standard and Pro packages, allowing merchants to start with core payment acceptance and add capabilities only when needed.

Value: Merchants keep costs low, avoid unnecessary complexity, and gain a scalable payment solution that grows with their business—without overbuying technology.

High-Level Functionality

SaleQuick Mobile enables businesses to accept, process, and manage payments wherever they operate, with a focus on mobile and on-the-go payment acceptance rather than full point-of-sale functionality. It supports secure card-present transactions through mobile devices and card readers, along with optional card-not-present capabilities such as virtual terminal access, invoicing, pay-by-link, text-to-pay, and recurring billing. The platform combines payment acceptance with lightweight transaction management and reporting, allowing merchants to offer flexible checkout options without the operational complexity of a traditional POS system. This keeps payment workflows simple and efficient while ensuring transactions and customer payments are easy to manage from a single, WAS-supported solution.

Positioning Statement / Elevator Pitch

Short “Walk-up” Pitch (15 Seconds)

“SaleQuick Mobile is the fastest way to get a merchant taking secure payments anywhere. It turns an iOS or Android device into a mobile checkout with EMV/contactless acceptance, and with the Pro package you can add virtual terminal, invoicing, and pay-by-link—without buying a full POS.”

Competitive Displacement Pitch (Square / Clover)

“If a merchant is using a mainstream mobile app today but needs something more business-ready, SaleQuick Mobile is the clean step up: mobile card-present acceptance plus Pro tools like virtual terminal, text/email pay-by-link, invoicing, and recurring billing—all supported through WAS and aligned to TSYS processing. The point isn’t ‘more features than they need’—it’s the right mobile stack to get paid on-site and remotely, without forcing them into a full POS.”

Discovery-Led Opening (Conversation Starter)

“Quick question—are you taking payments in the field or at events, and does your current setup force you to invoice later, chase the customer, or key payments after the job is done?”
“That’s exactly where SaleQuick Mobile fits—mobile card-present acceptance on day one, and if you need it, Pro adds invoicing and pay-by-link so customers can pay even when they’re not standing in front of you.”

Margin Protection / Cost Recovery Pitch

“Merchants tell us they don’t want to overpay for a full POS when they just need reliable mobile payments. SaleQuick Mobile keeps costs right-sized by starting with core mobile acceptance, then letting the merchant upgrade only if/when they need Pro capabilities like virtual terminal, pay-by-link, invoicing, or recurring billing—so they’re not buying a ‘big system’ to solve a simple payment problem.”

Objection Responses

"I already have a POS System."	That's great — many SaleQuick merchants do. SaleQuick Mobile isn't trying to replace a full POS; it complements or replaces the *payment piece* when merchants need to take payments in the field, at events, or remotely. It gives them a fast way to get paid anywhere without reworking their entire operation.
"Switching systems sounds like a headache."	Totally fair — and that's exactly why SaleQuick Mobile is simple. There's no complex data migration, no inventory rebuilt, and no long training period. Most merchants are up and processing quickly because it's a mobile payment solution, not an operational overhaul.
"My current system works fine."	Most systems work fine — until the merchant needs flexibility. The question isn't whether it works at the counter, but whether it works when they're onsite, on the road, or collecting payment later. SaleQuick Mobile fills those gaps without forcing a full system change.
"I don't want to learn new software."	That makes sense — and SaleQuick Mobile is designed for that exact concern. It's lightweight, intuitive, and easy to learn, especially for owner-operators and small teams. Merchants can start with core payment acceptance and only add Pro tools if they need them.
"I only need something really simple."	Perfect — that's where SaleQuick Mobile shines. The Standard package keeps things lean and payments-focused, and if the business grows, Pro adds invoicing, pay-by-link, and recurring billing. Merchants aren't paying for complexity they don't need today.
"What if my business grows?"	That's built in. SaleQuick Mobile lets merchants start with mobile card-present payments and expand into remote payments and billing tools over time — without jumping straight to a full POS. And if they outgrow mobile altogether, there's a clear upgrade path within the WAS portfolio.
"Why not just use a basic mobile app?"	Basic apps are fine for hobby sellers, but growing businesses need stability, support, and flexibility. SaleQuick Mobile is a WAS-supported solution with underwriting, TSYS processing alignment, and professional tooling like invoicing and recurring billing — making it business-ready, not just convenient.

Key Differentiators

Comparison	SaleQuick Mobile	Square	SwipeSimple
Fees			
Monthly Software Fee	$20.00 - $39.00	Varies	Varies
Extra Features = Extra Monthly	Included	Square App Marketplace	X
Hardware Ranges	$150	$49 - $1,399	$150
Additional Device Monthly Fee	X	Varies by Reseller	X
Customized Pricing Available	✓		✓
Industry Specific Software			
Business Size	Small – Medium	Small – Medium	Small - Medium
POS Type	Cloud / Mobile App	Cloud / Mobile App	Cloud / Mobile App
Software Type	iOS & Android	iOS & Android	iOS & Android
Merchant Services	In House	In House	In House
Core Payment Features			
Mobile Card-Present (EMV / NFC)	✓	✓	✓
Virtual Terminal	✓	✓	✓
Keyed / Card-Not-Present	✓	✓	✓
Recurring Payments	✓	Add on $	Add on $
Invoicing	✓	✓	✓
Pay-by-Link / Text-to-Pay	✓	Add on $	✓
SMS / Email Receipts	✓	✓	✓
Lightweight Commerce Tools			
Item / Service Catalog	✓	✓	✓
Basic Inventory Tracking	✓	✓	✓
Barcode Scanning	X	✓	✓
Discounts / Tips / Splits	✓	✓	✓
Pre-Authorization	✓	✓	✓
Reporting & Operations			
Transaction Reporting	✓	✓	✓
Real-Time Reporting	✓	✓	✓
Automated Reconciliation	✓	✓	✓
Support & Control			
Bank / Processor-Aligned Support	✓	X	X
WAS Onboarding & Support	✓	X	X
White-Label / ISO Friendly	Add on $	X	Add on $

Key Configurations and Sales Channels

Key Configurations

SaleQuick Mobile is a cloud-based, mobile payment solution designed for on-the-go and remote payment acceptance, deployable on iOS and Android devices using supported mobile card readers such as BBPOS and VP3350. It can be configured as a mobile-only card-present solution or upgraded to include card-not-present capabilities through the Pro package, which adds virtual terminal access, invoicing, pay-by-link, text-to-pay, and recurring billing. SaleQuick Mobile does not require fixed POS hardware or complex system setup, allowing merchants to start with a lightweight payments-first configuration and selectively enable additional features based on business needs.

Sales Channels

SaleQuick Mobile is sold through WAS internal sales teams, branch channels, and approved ISO and partner networks, with merchant onboarding, underwriting, processing setup, and ongoing support managed by Woodforest Acceptance Solutions. Hardware fulfillment, application provisioning, and escalation support are coordinated through WAS, ensuring consistent deployment standards and a bank-supported merchant experience across all sales channels.

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2. Product Capabilities

	Package		
Feature	**Standard**	**Pro**	**Description**
Mobile Payments	✓	✓	Take payments from a phone/tablet using the SaleQuick app.
Mobile Payments Dashboard	✓	✓	View volumes and transactions in a dashboard view.
Invoicing	✓	✓	Send invoices to collect payment from customers.
Text-to-Pay	✓	✓	Request payment via text message.
Pay-by-Link		✓	Send a payment link by text/email.
QR Code Payments	✓	✓	Collect payments using a QR code.
Cash Discounting Options	✓	✓	Enable cash discounting / non-cash adjustment options.
Virtual Terminal / Gateway		✓	Key in card payments through a virtual terminal.
One-Time CNP Payments		✓	Accept keyed payments when the customer isn't present.
Recurring Payments		✓	Run reports for visibility into activity and performance.
Sales Trends Reporting		✓	View sales trend reporting insights.
Inventory Management		✓	Track inventory using Pro/Enhanced tools.
Website API		✓	Use an API for website/integration use cases.
QuickBooks Integration		✓	Connect to QuickBooks for accounting workflows.
Email Receipts	✓	✓	Send receipts via email.
Text Receipts	✓	✓	Send receipts via text message.
Custom Brand on Documents	✓	✓	Add a logo that prints on receipts/invoices.
Multiple User Functionality		✓	Support multiple users on the account.
Customer Tracking		✓	Store customer details to track activity over time.
Mobile Reader Support	✓	✓	Use supported BBPOS/VP3350 reader for mobile acceptance.
Mobile Devices Support	✓	✓	Use across common device types to take/collect payments.
App Availability	✓	✓	App is available in the Apple and Google app stores.
Stored Customer Payments		✓	Save tokenized cards for faster future payments.
Partial Invoice Payments		✓	Allow customers to pay an invoice balance over time.
Invoice Due Dates	✓	✓	Assign due dates to invoices for payment control.
Invoice Status Tracking	✓	✓	Track invoices as draft, sent, paid, or overdue.
Custom Invoice Notes	✓	✓	Add merchant notes or memos to invoices.
Settlement Visibility	✓	✓	View settled vs. unsettled transactions.
Exportable Reports		✓	Export transactions and reports for accounting.
Customer Directory		✓	Store and manage customer profiles.
PCI-Scoped Environment	✓	✓	Card data never exposed to the merchant.

Limitations

- Not a full point-of-sale system
- No open app marketplace or third-party app store
- Limited inventory capabilities (basic; no omnichannel sync or transfers)
- No employee scheduling, timecards, or labor management
- No appointment or calendar-based scheduling
- No native eCommerce storefront or shopping cart builder
- No Buy Now, Pay Later (BNPL) options (e.g., Afterpay, Klarna, Affirm)
- Limited custom integrations (API available only in Enhanced; not for deep embedded use cases)
- No consumer discovery, booking marketplace, or review-driven traffic tools
- Rigid package structure (features bundled by tier; limited à-la-carte options)
- Not designed for full-service restaurants, kitchen workflows, or multi-lane retail
- Regulated payment types not supported (no EBT, FSA/HSA)
- ACH / e-Check payments not natively supported

User Personas

SaleQuick is designed for small, mobile, and service-oriented businesses that prioritize taking payments anywhere and getting paid quickly, rather than managing complex in-store operations. Unlike full POS platforms, SaleQuick supports authenticated, lightweight user access appropriate for owner-operators and small teams, but does not offer the granular, role-based permission structures found in full POS systems.

Examples of User Role Permissions

- Business Owner / Owner-Operator - Runs the business day-to-day and uses SaleQuick as the primary way to get paid, send invoices, and track activity.
- Service Technician / Field Professional - Works in the field and needs a fast, reliable way to collect payment on-site when the job is complete.
- Office Admin / Bookkeeper (Enhanced Package) - Handles billing, payments, and basic reconciliation from the back office rather than the field.
- Event Staff / Temporary Seller - Supports short-term selling environments like events, pop-ups, or markets where speed and simplicity matter.
- Growing Business Manager (Transition Persona) - Manages a business that starts mobile-first but is gradually adding structure and operational needs.

3. Architecture & Technical Summary

High-Level Architecture Diagram

SaleQuick is a cloud-based, mobile-first payment platform, meaning it does not rely on on-site servers, fixed POS infrastructure, or complex local configuration. Payment processing, invoicing, recurring billing, reporting, and customer data are managed securely in the cloud, while the merchant's mobile device and card reader are used solely to capture card interactions. This architecture enables payments to be accepted anywhere—on-site, on the road, or remotely—while keeping transaction data, invoices, and reports synchronized in real time across the mobile app and web portal. Because SaleQuick is cloud-delivered, updates and feature enhancements are applied automatically without downtime, and merchants benefit from high availability, strong security controls, and scalability without having to manage IT systems or POS hardware.

Ecosystem Fit

SaleQuick serves as Woodforest Acceptance Solutions' mobile-first, payment-centric solution for merchants that need simple, portable acceptance without a full POS system. SaleQuick transactions run on TSYS processing rails under the WAS acquiring relationship, allowing Woodforest to retain control over underwriting, pricing, support, settlement, and funding while delivering fast, secure payments for mobile and early-stage businesses. Within the WAS ecosystem, SaleQuick sits intentionally below Delta1st, acting as a lightweight entry point for field-service, event-based, and on-the-go merchants, while creating a natural upgrade path to more advanced WAS-owned platforms as merchant needs evolve.

System Requirements

- iOS or Android Smart Device (Smartphone or tablet capable of running the SaleQuick mobile application.)
- Supported Mobile Card Readers (BBPOS or VP3350)
- Internet Connectivity (Wi-Fi, cellular data, or hotspot)
- Web Browser (Enhanced Package)
- WAS Merchant Account (Approved Woodforest Acceptance Solutions merchant account for underwriting, processing, settlement, and support.)

Certified Platform

- TSYS – Total System Services

Security & Compliance Summary

- PCI DSS–compliant platform (SAQ-B validated)
- Point-to-point encryption (P2PE) for card-present transactions
- Tokenization for stored credentials and card-not-present payments
- Card data never stored on merchant devices or systems
- Processor- and network-level fraud monitoring and controls
- Secure, cloud-hosted payment, invoicing, and reporting environment
- Authenticated user access for mobile app and virtual terminal
- WAS-managed underwriting, risk, compliance, and support oversight

4. Product Configuration & Options

Customizable Settings

- Tax & Fee Configuration (Basic)
    - Configure a single standard tax rate or flat fee structure for transactions and invoices.
    - Designed for simplicity; does not support complex multi-tax, location-based, or item-level tax rules.

- Discounts & Adjustments
    - Cash Discount / Non-Cash Adjustment: Configure cash discounting or non-cash adjustment settings applied automatically at checkout or invoicing.
    - Manual Adjustments: Apply simple adjustments to invoices or transactions when needed (where permitted by configuration).

- Invoicing Settings
    - Customize invoice templates with business name, logo, notes, and payment instructions.
    - Configure invoice due dates, partial payments, and reminder behavior (Enhanced package).
    - Enable payment methods available on invoices (card, stored credentials, pay-by-link).

- Payment & Billing Controls
    - Enable or disable card-present, card-not-present, invoicing, pay-by-link, and recurring billing (by package).
    - Configure recurring billing schedules (weekly, monthly, custom intervals) in Enhanced package.

- Receipt & Branding Options
    - Upload custom logos for receipts and invoices.
    - Configure receipt delivery methods (email and/or SMS).
    - Customize receipt and invoice messaging text.

- Customer Management Settings
    - Enable saved customer profiles and stored payment methods (Enhanced package).
    - Manage customer contact details used for invoicing, text-to-pay, and receipts.

- Reporting & Visibility Settings (Enhanced Package)
    - Filter transaction and invoice reports by date range, payment method, or status.
    - Configure export options for reports (CSV/PDF) for accounting or reconciliation use.

- User Access (Lightweight)
    - Credential-based access for mobile apps and virtual terminal users.
    - Designed for small teams, it does not support granular role-based permissions like a full POS.

Optional Modules

- SaleQuick Mobile (Lite)
- SaleQuick Enhanced
    - No, A La Carte options, all features are included in the designated packages.

Hardware Options

- BBPOS (Bluetooth dongle)
- ID Tech VP3350

5. Operational Processes

Transaction Methods

- Card-present transactions (EMV chip, contactless/tap, and swipe)
- Keyed transactions via virtual terminal (MOTO)
- E-invoicing / pay-by-link transactions (customer-keyed)
- Recurring payment transactions (stored credentials, scheduled billing)

Reporting Overview

SaleQuick Reports

All reports can be filtered to show specific date periods, store locations, users, products, transaction statuses, etc.)

Report Types	Description of Report
Sales History	View transaction history across selected date ranges to analyze sales activity and trends over time.
Daily Sales	Provides a daily breakdown of total sales by payment method for end-of-day reconciliation and reporting.
Transaction Detail	Shows individual transaction records including amount, payment type, date, and status for review or troubleshooting.
Tax Collected	Summarizes total tax collected over a selected period for reporting and accounting purposes.
Invoice History	Shows all invoices with status indicators (sent, paid, overdue) and payment activity tied to each invoice.
Customer Sales	Displays sales and payment activity by customer, useful for tracking repeat customers and invoicing history.
Recurring Billing	Lists recurring payment schedules, charges processed in a selected period, and their success or failure status.
Payment Method Breakdown	Separates sales by card-present vs. card-not-present transactions to support payment mix analysis.
Refund Activity	Shows refunded transactions with amounts, dates, and original transaction references.

Elevate Reporting and CyberSource Reporting are also available. See the Payments 101 section for further details and what reports can be generated.

Operational Constraints

Constraints vary by software tier and enabled features.