



Virtual Terminal Credit Card Guide

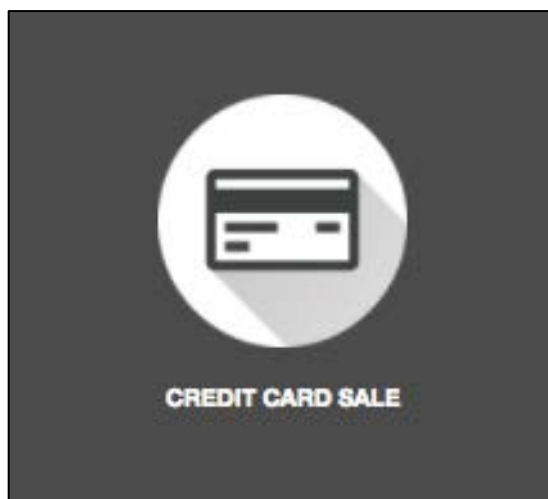
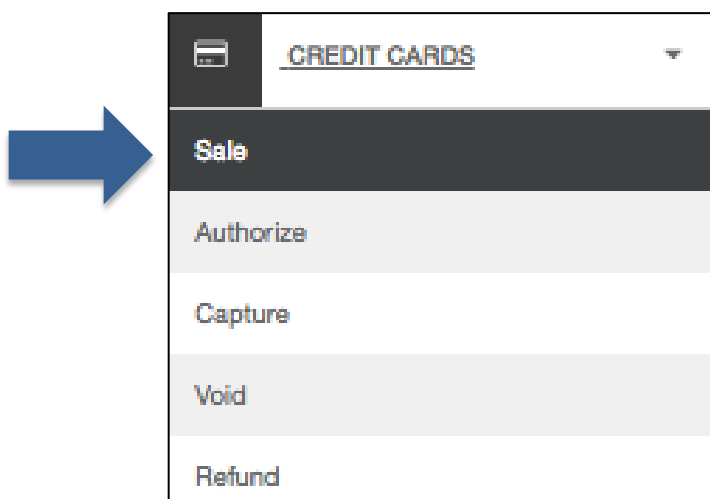
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How to process a sale

A sale is a transaction that is authorized and captured for settlement. After a sale is processed, the transaction is automatically flagged to be settled.

A sale can be voided prior to settlement and must be refunded to reverse the transaction if the transaction has been settled.

Step 1: Click **Sale** under **Credit Cards** from the **Main Menu** or use the **Shortcut Icon** on the **Home Screen**.



Step 2: Enter the sales details such as billing information, order information, card billing address, merchant defined fields and processor.

Home / Virtual Terminal CC Sale

Enter the sales details to charge a customer. + / ✎

Billing Information

Credit Card Number * Expiration Date * CVV/CID ⓘ
 MMY

Amount * Currency ⓘ

Add to Customer Vault ⓘ

Order Information

Order ID PO Number

Order Description

Note: fields with red asterisk are required.

Step 3: Click Charge to complete.

Home / Virtual Terminal CC Sale

Enter the sales details to charge a customer. + ↗

Billing Information

Credit Card Number ✔ **Expiration Date** ✔

Amount ✔ **Currency** ✔

Add to Customer Vault ! **Customer Vault ID** !

Order Information

Order ID ✔

Order Description ✔

Card Billing Address

First Name ✔ **Last Name** ✔ **Company** ✔

Country ✔ **Address** ✔

Address (cont.) **City** ✔ **State** ✔ **Zip Code** ✔

Email Address ✔

Shipping Address

Same as Billing



[Transaction Successful](#)

Home / Virtual Terminal CC Sale

Transaction Successful

[Create Subscription](#)
[Add to Vault](#)

Transaction Receipt

[Print Receipt](#) | [E-Mail Receipt](#)

Merchant	Date/Time
JD Construction - (Chicago, IL)	01/19/2018 2:03:56 PM CST

Transaction ID	Transaction Type	Amount
3954869652	Card Sale	12.34

Credit Card Information

CC Type	CC Number	
Visa	411111*****1111 <input type="button" value="Q"/>	
CC Expiration	Auth. Code	AVS Status
01/12	123456	No address or ZIP matc
CVV Status	Processor	Currency
	CC Processor A	USD

Billing Information	Shipping Information
John Smith	John Smith
Apparel Co.	Apparel Co.
johnsmith@apparelco.com	johnsmith@apparelco.com
123 Main Street	123 Main Street
Chicago IL, 60185	Chicago IL, 60185
US	US

Order Information

Order ID	Description
227014	Online Order

[Transaction Failed/Declined](#)

Transactions that do not process successfully will trigger a failure response.



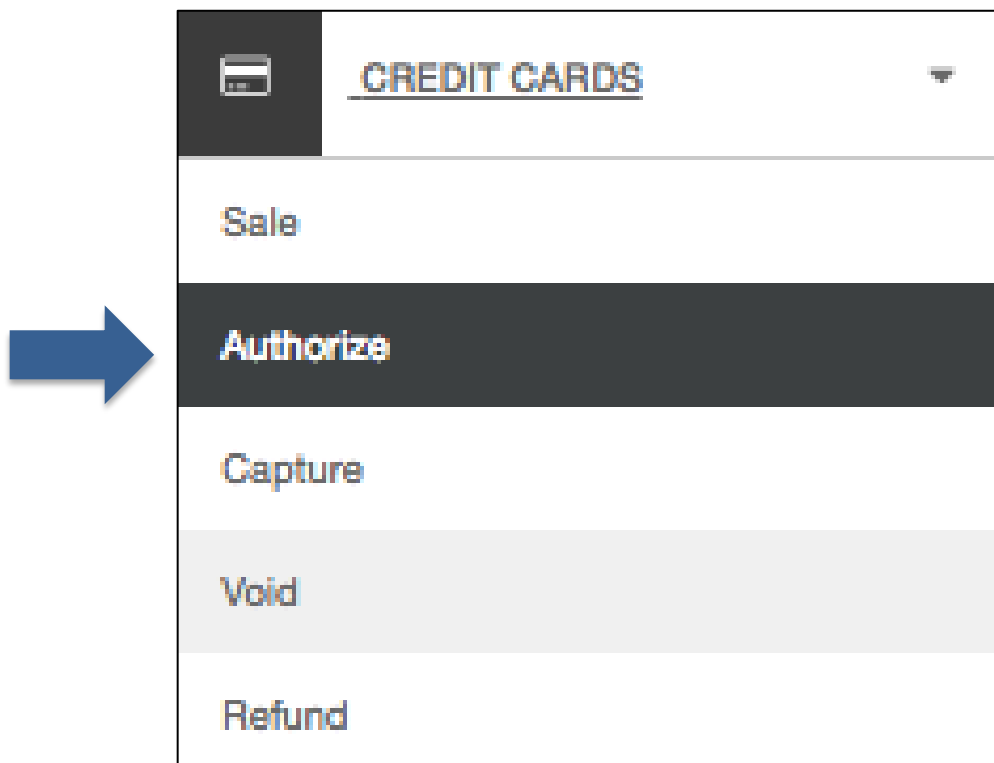
How to authorize or capture a transaction

Authorize is used to check if there is a sufficient balance available on the credit card. When a transaction is authorized, it indicates that the credit card has adequate funds.

Capture is used when a transaction has been authorized and ready to be settled.

An authorization **MUST** be captured in order for the settlement to go through and the funds to be transferred. When a transaction is both authorized and captured, a sale is processed.


Step 1: Click **Authorize** under **Credit Cards** from the **Main Menu**.



Step 2: Enter the details to authorize a transaction.


Note: fields with red asterisk are required.

Home / Virtual Terminal CC Auth Only

Enter the details to authorize a transaction. 

Billing Information

Credit Card Number * **Expiration Date ***

Amount * **Currency** 

Order Information

Order ID

Order Description

Step 3: Click **Authorize** to complete.

Home / Virtual Terminal CC Auth Only

Enter the details to authorize a transaction. + / ✎

Billing Information

Credit Card Number ✔ **Expiration Date** ✔

Amount ✔ **Currency** ✔

Order Information

Order ID ✔

Order Description ✔

Card Billing Address

First Name ✔ **Last Name** ✔ **Company** ✔

Address ✔

City ✔ **State** ✔ **Zip Code** ✔

Email Address ✔

Processor

Processor

Authorize



[Transaction Successful](#)

Home / Virtual Terminal CC Auth Only

Transaction Successful

[Create Subscription](#)
[Add to Vault](#)

Transaction Receipt

|

Merchant	Date/Time
JD Construction - (Chicago, IL)	01/19/2018 2:31:38 PM CST

Transaction ID	Transaction Type	Amount
3954917002	Card Authorization	75.00

Credit Card Information

CC Type	CC Number
Visa	411111*****1111 <input type="button" value="Q"/>

CC Expiration	Auth. Code	AVS Status
01/12	123456	No address or ZIP matc

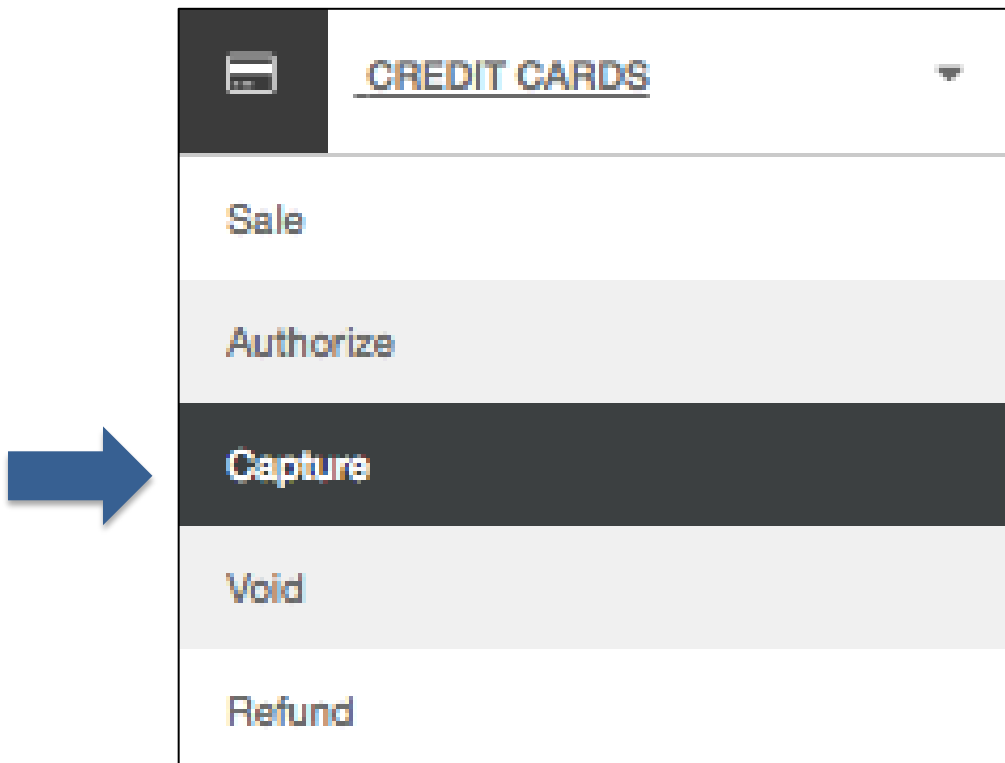
CVV Status	Processor	Currency
	CC Processor A	USD

Billing Information	Shipping Information
John Smith	US
Apparel Co.	
johnsmith@apparelco.com	
123 Main Street	
Chicago IL, 60185	
US	

Order Information

Order ID	Description
45123	Clothing

Step 1: Click **Capture** under **Credit Cards** from the **Main Menu**.



Step 2: Enter the details to capture a transaction.

Home / Virtual Terminal CC Capture Only

Enter the transaction ID of the original transaction and the amount to be captured.
For Voice Authorizations or Offline Transactions, [click here](#)

Authorization Information

Transaction ID *	Amount *
<input type="text"/>	\$ 00.00 (nn.nn)

Capture

Note: fields with red asterisk are required.

Step 3: Click **Capture** to complete.

Home / Virtual Terminal CC Capture Only

Enter the transaction ID of the original transaction and the amount to be captured.

For Voice Authorizations or Offline Transactions, [click here](#)

Authorization Information

Transaction ID *	Amount *
3954917002	\$ 75.00 (nn.nn)

Capture



Transaction Successful

Home / Virtual Terminal CC Capture Only

Transaction Successful

[Create Subscription](#) [Add to Vault](#)

Transaction Receipt

Print Receipt | **E-Mail Receipt**

Merchant	Date/Time
JD Construction - (Chicago, IL)	01/19/2018 2:37:12 PM CST

Transaction ID	Transaction Type	Amount
3954917002	Card Capture	75.00

Credit Card Information

CC Type	CC Number
Visa	411111*****1111

CC Expiration	Auth. Code	AVS Status
01/12	123456	No address or ZIP matc

CVV Status	Processor	Currency
	CC Processor A	USD

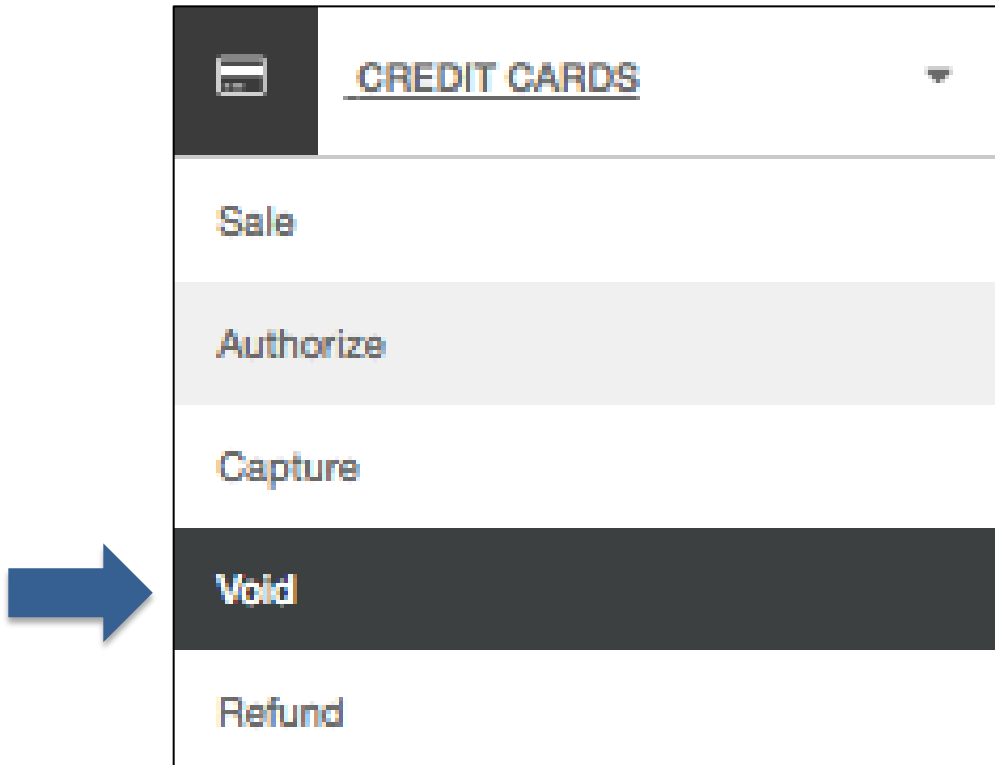
Billing Information Shipping Information

John Smith US

How to void a transaction

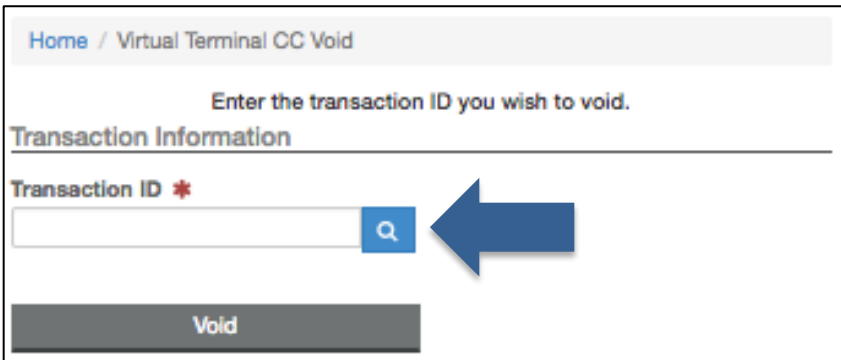
A void can be performed on a transaction prior to settlement. To void a transaction, simply enter the transaction ID in the void area under the Virtual Terminal section.

Step 1: Click **Void** under **Credit Cards** from the **Main Menu**.



Step 2: Merchant can use the **magnifier icon** to look up a transaction.

Note: fields with red asterisk are required.




A screenshot of a web form titled "Home / Virtual Terminal CC Void". The form contains the instruction "Enter the transaction ID you wish to void." and a section labeled "Transaction Information". Under this section, there is a text input field for "Transaction ID *", where the asterisk is red. A magnifier icon (a blue square with a white 'Q') is positioned to the right of the input field. A large blue arrow points from the right towards the magnifier icon. Below the input field is a dark grey button labeled "Void".


Step 3: Enter the **Transaction ID** of the original transaction you wish to void. Click **Void** to complete.


Home / Virtual Terminal CC Void

Enter the transaction ID you wish to void.

Transaction Information

Transaction ID 



Void 

Transaction Successful


Home / Virtual Terminal CC Void

Transaction Successfully Cancelled

[Create Subscription](#) [Add to Vault](#)

Transaction Receipt

Print Receipt | **E-Mail Receipt**

Merchant	Date/Time	
JD Construction - (Chicago, IL)	01/19/2018 2:50:13 PM CST	
Transaction ID	Transaction Type	Amount
3954939392	Card Void	75.00
Credit Card Information		
CC Type	CC Number	
Visa	411111*****1111 	
CC Expiration	Auth. Code	AVS Status
01/02	123456	No address or ZIP matc
CWV Status	Processor	Currency
	CC Processor A	USD
Billing Information	Shipping Information	

How to process a refund

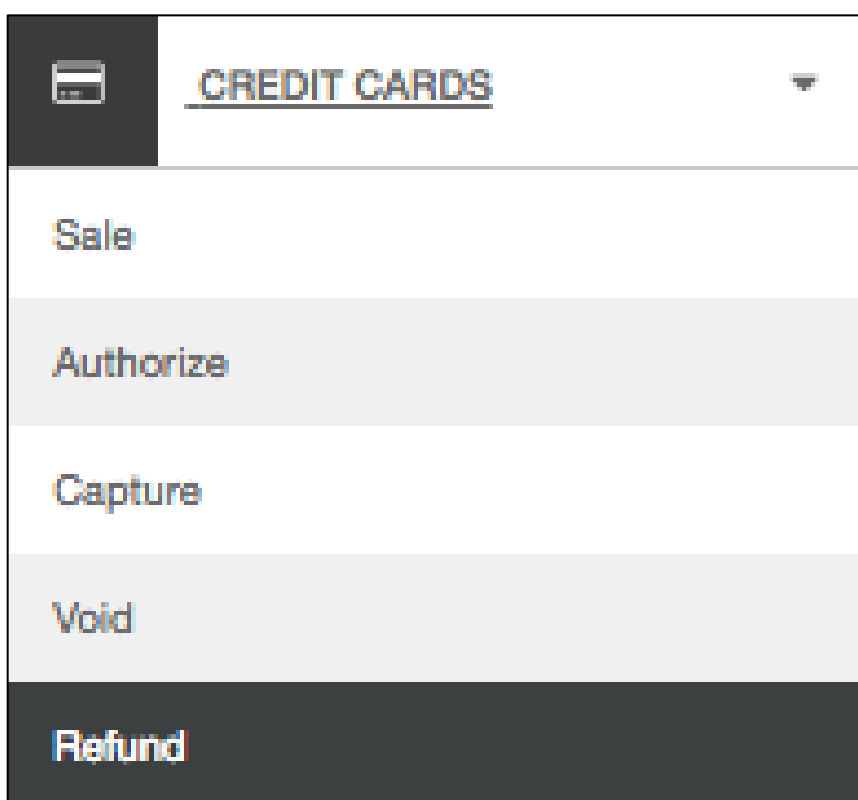
To refund a transaction, simply enter the Transaction ID and the amount you wish to refund.

Merchant can choose to make a full refund or a partial refund.

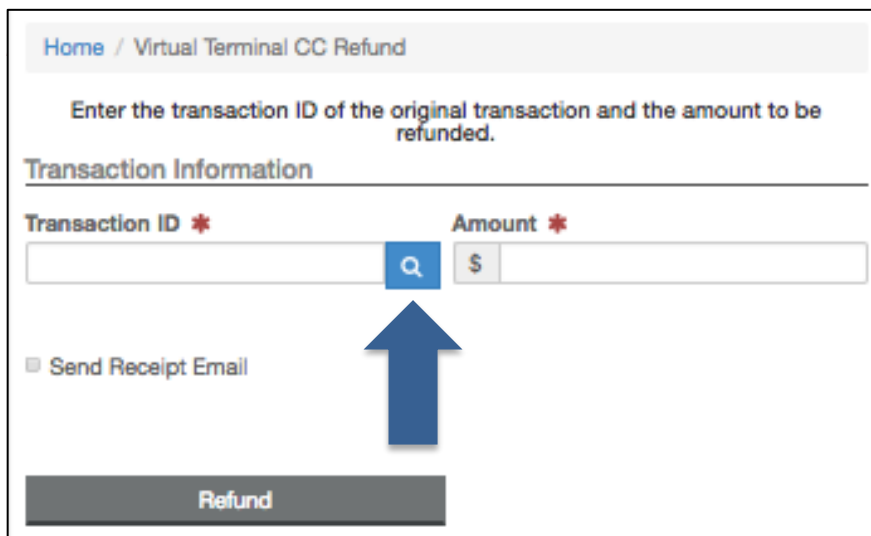
To make a partial refund, simply set the amount to be less than the original amount captured.

To make a full refund, the amount must be equal to the original amount captured.

Step 1: Click **Refund** under **Credit Cards** from the **Main Menu**.



Step 2: Merchant can use the **magnifier icon** to look up a transaction.




Home / Virtual Terminal CC Refund

Enter the transaction ID of the original transaction and the amount to be refunded.

Transaction Information

Transaction ID * Amount *

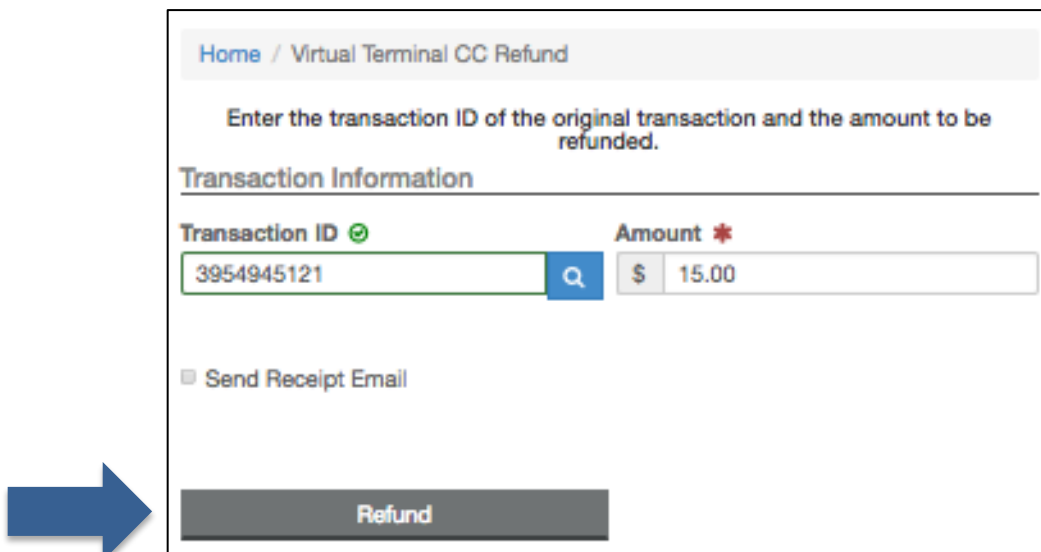
 \$

Send Receipt Email

Refund

A blue arrow points to the magnifier icon in the Transaction ID field.


Step 3: Enter the **Transaction ID** of the original transaction you wish to void. Click **Refund** to complete.




Home / Virtual Terminal CC Refund

Enter the transaction ID of the original transaction and the amount to be refunded.

Transaction Information

Transaction ID  Amount *

3954945121  \$ 15.00

Send Receipt Email

Refund

A blue arrow points to the Refund button.

[Transaction Successful](#)

Home / Virtual Terminal CC Refund

Transaction Successfully Refunded

[Create Subscription](#) [Add to Vault](#)

Transaction Receipt

[Print Receipt](#) | [E-Mail Receipt](#)

Merchant		Date/Time
JD Construction - (Chicago, IL)		01/19/2018 2:55:28 PM CST
Transaction ID	Transaction Type	Amount
3954947843	Card Refund	-15.00

Credit Card Information

CC Type	CC Number	
Visa	411111*****1111 <input type="button" value="Q"/>	
CC Expiration	AVS Status	CVV Status
01/19		
Processor	Currency	
CC Processor A	USD	

Billing Information **Shipping Information**

John Smith US

Advanced features

Adding and deleting fields

Step 1: Merchants can add or delete non-required fields by clicking the **wrench**.

Home / Virtual Terminal CC Sale

Enter the sales details to charge a customer.

Billing Information

Credit Card Number * Expiration Date * CW/CID ⓘ

Amount * Currency ⓘ

\$ 00.00 USD

Add to Customer Vault ⓘ Customer Vault ID ⓘ

A blue wrench icon is located to the right of the form header.

Step 2: Additional fields are pulled up. Toggle the fields on or off by clicking the **boxed X**. Click the **disk** to save changes.

Home / Virtual Terminal CC Sale

Enter the sales details to charge a customer.

Billing Information

Credit Card Number * Expiration Date * CW/CID ⓘ **X**

Amount * Currency ⓘ

\$ 00.00 USD

Add to Customer Vault ⓘ **X** Customer Vault ID ⓘ **X**

A save icon (disk) is located to the right of the form header. Red 'X' icons are present next to the CW/CID, Add to Customer Vault, and Customer Vault ID labels.