



# Virtual Terminal Credit Card Guide

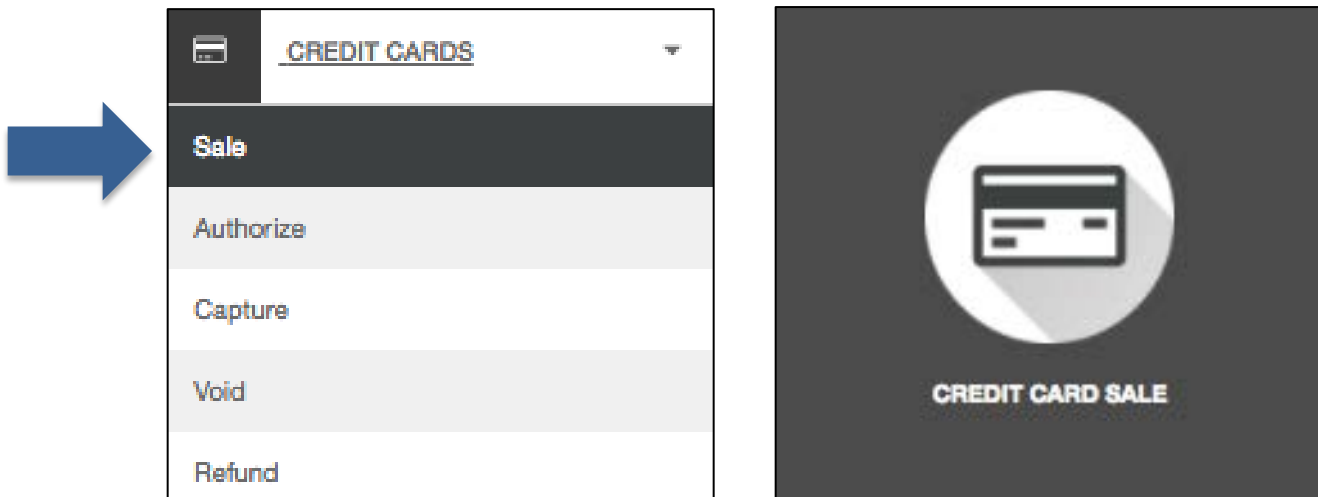
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## How to process a sale

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 \*      CVW/CID ⓘ

     MMY     

Amount \*      Currency ⓘ

\$ 00.00      USD

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. + ↗

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### Billing Information

**Credit Card Number** ✔  **Expiration Date** ✔

**Amount** ✔  **Currency** ✔

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

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### Order Information

**Order ID** ✔

**Order Description** ✔

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### Card Billing Address

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

**Country** ✔  **Address** ✔

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

**Email Address** ✔

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### Shipping Address

Same as Billing





Home / Virtual Terminal CC Sale

**Transaction Successful**

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

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**Transaction Receipt**

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

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

Transaction ID	Transaction Type	Amount
3954869652	Card Sale	12.34

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**Credit Card Information**

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

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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

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**Order Information**

Order ID	Description
227014	Online Order

### Transaction Failed/Declined

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



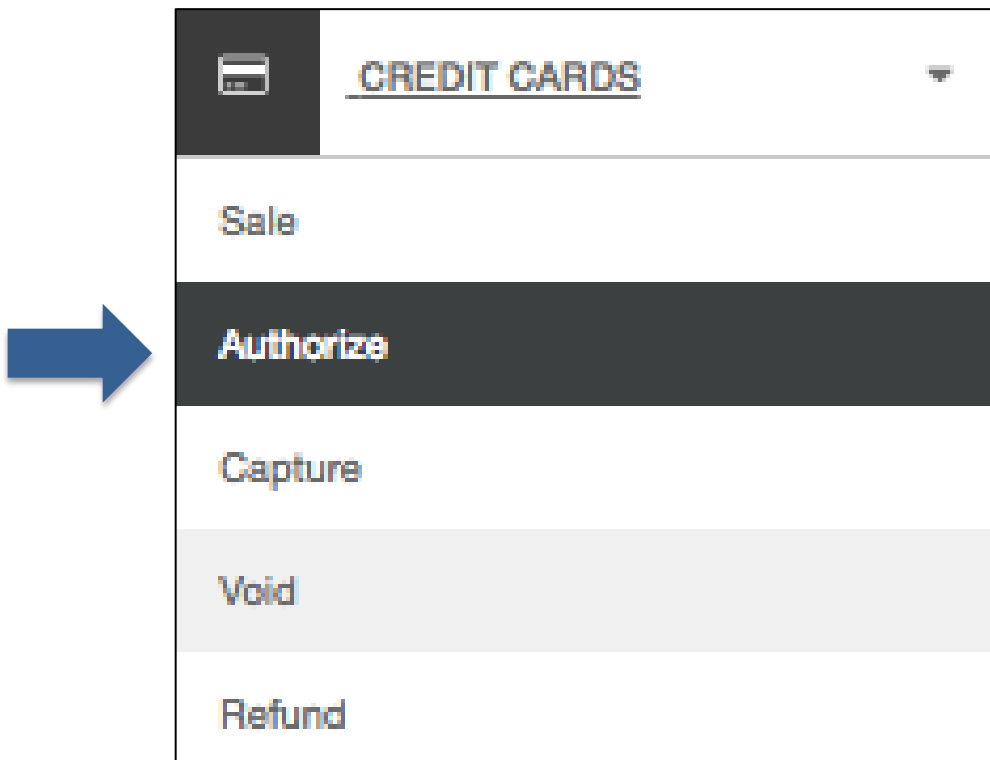
## How to authorize or capture a transaction

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. + ↗

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**Billing Information**

**Credit Card Number \***

**Expiration Date \***

**Amount \***  **Currency**

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**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. + /

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**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** ✔

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**Processor**

**Processor**

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**Authorize**





## Transaction Successful

Home / Virtual Terminal CC Auth Only

**Transaction Successful**

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

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**Transaction Receipt**

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

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

<b>Transaction ID</b>	<b>Transaction Type</b>	<b>Amount</b>
3954917002	Card Authorization	75.00

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**Credit Card Information**

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

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

<b>CVV Status</b>	<b>Processor</b>	<b>Currency</b>
	CC Processor A	USD

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

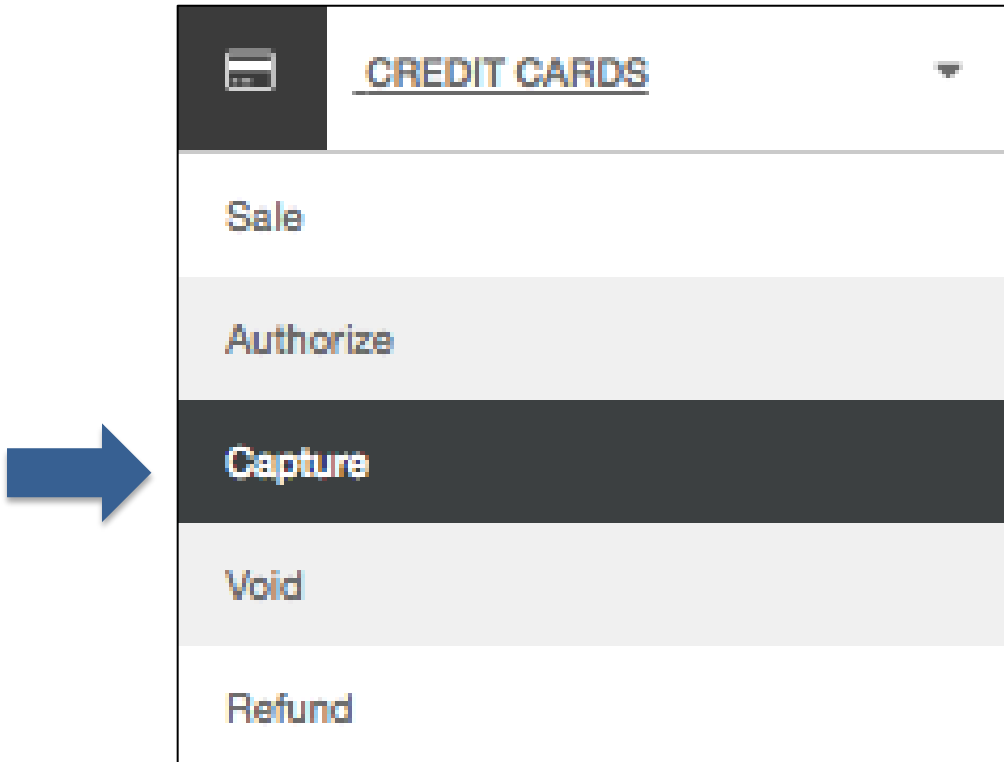
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**Order Information**

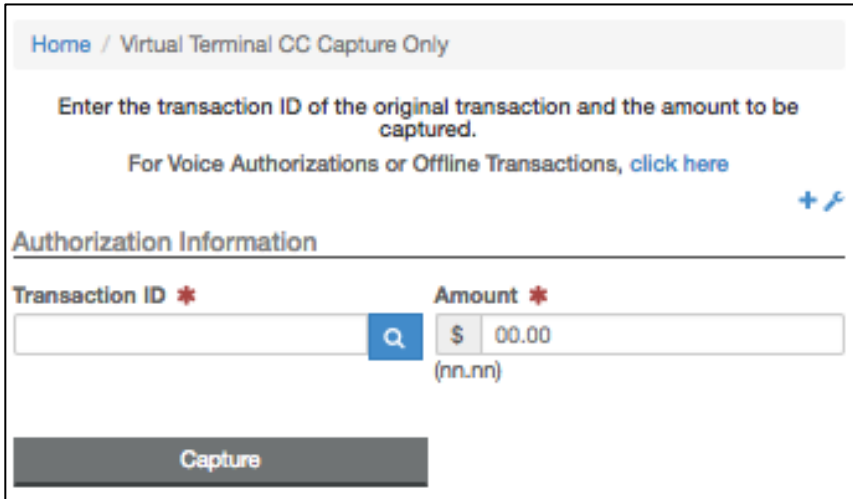
<b>Order ID</b>	<b>Description</b>
45123	Clothing



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



**Step 2:** Enter the details to capture a transaction.



A screenshot of a web form titled "Virtual Terminal CC Capture Only". The form contains the following text and fields:

- 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 \* (input field with a search icon)
- Amount \* (input field with a currency symbol "\$" and a format "(nn.nn)")
- Capture (button)

*Note: fields with red asterisk are required.*



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

Home / Virtual Terminal CC Capture Only

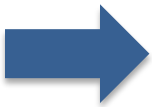
Enter the transaction ID of the original transaction and the amount to be captured.

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

**Authorization Information**

<b>Transaction ID *</b>	<b>Amount *</b>
<input type="text" value="3954917002"/>	<input type="text" value="\$ 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**

<b>Merchant</b>	<b>Date/Time</b>
<input type="text" value="JD Construction - (Chicago, IL)"/>	<input type="text" value="01/19/2018 2:37:12 PM CST"/>

<b>Transaction ID</b>	<b>Transaction Type</b>	<b>Amount</b>
<input type="text" value="3954917002"/>	<input type="text" value="Card Capture"/>	<input type="text" value="75.00"/>

**Credit Card Information**

<b>CC Type</b>	<b>CC Number</b>
<input type="text" value="Visa"/>	<input type="text" value="411111*****1111"/>

<b>CC Expiration</b>	<b>Auth. Code</b>	<b>AVS Status</b>
<input type="text" value="01/12"/>	<input type="text" value="123456"/>	<input type="text" value="No address or ZIP matc"/>

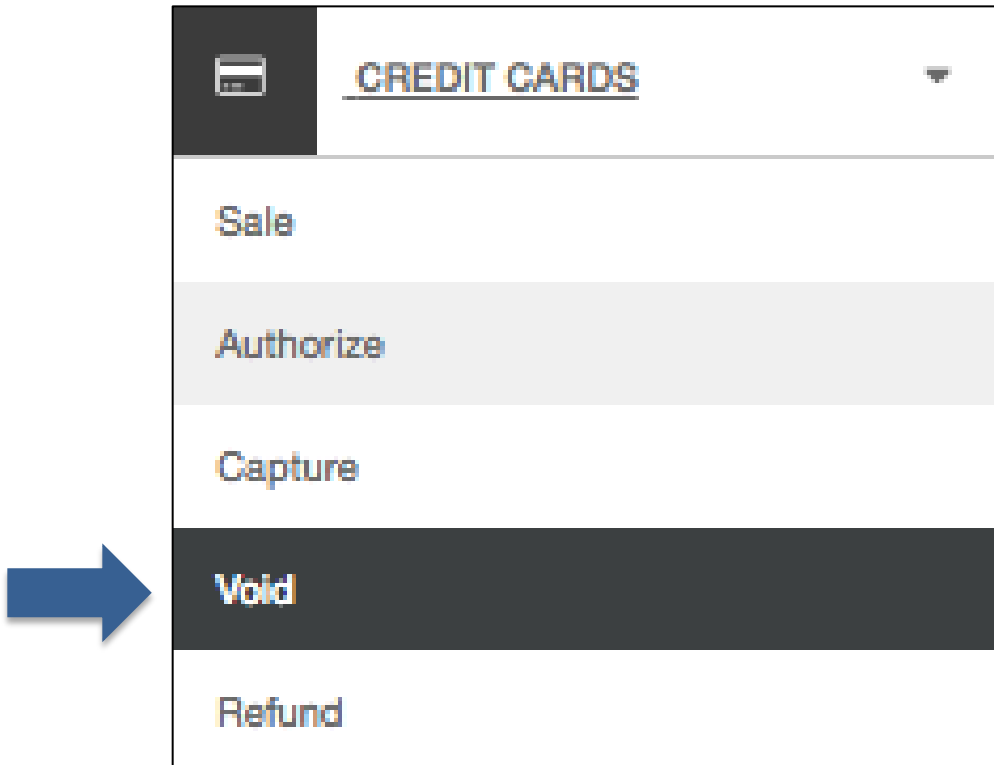
<b>CWV Status</b>	<b>Processor</b>	<b>Currency</b>
<input type="text"/>	<input type="text" value="CC Processor A"/>	<input type="text" value="USD"/>

**Billing Information**      **Shipping Information**

## How to void a transaction

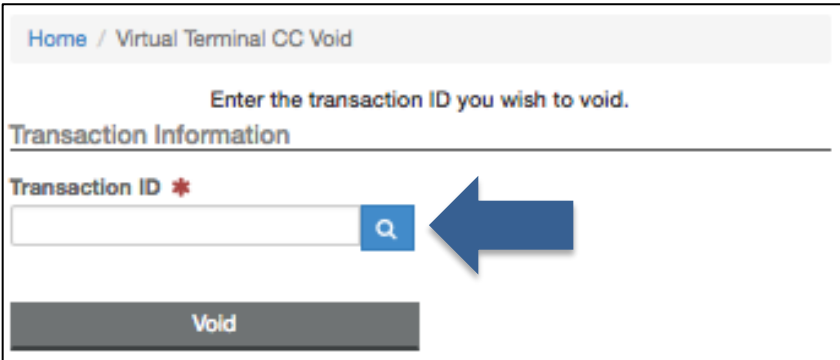
A void can be performed on a transaction prior to settlement. To void a transaction, simply enter the transaction ID in the void area under the Virtual Terminal section.

**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 indicates a required field. A magnifying glass icon is positioned to the right of the input field. A large blue arrow points from the right towards the magnifying glass icon. Below the input field is a "Void" button.


**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

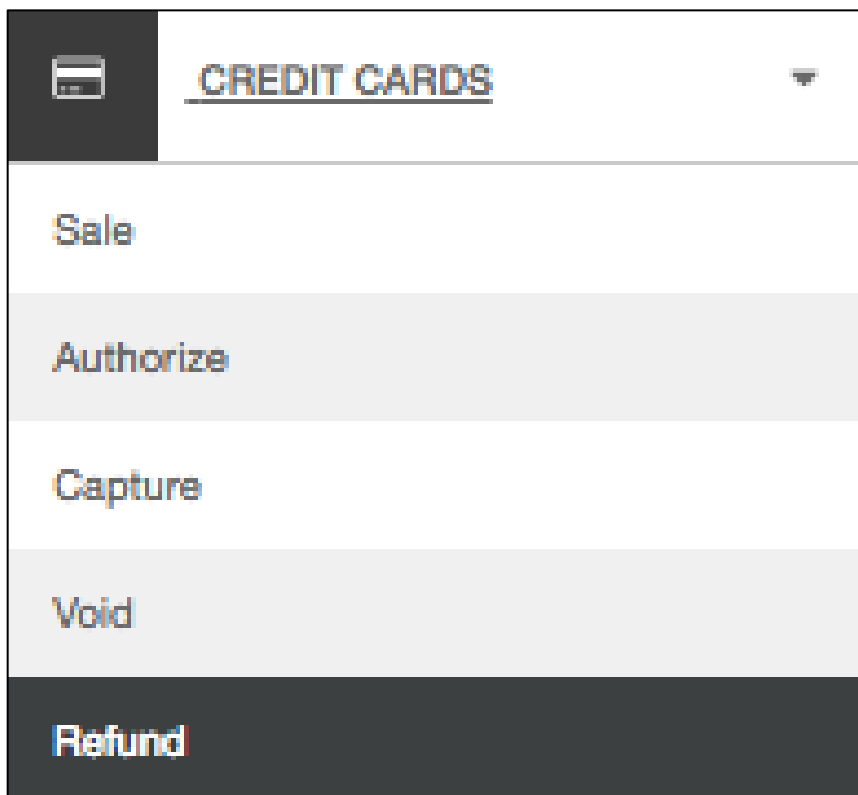
To refund a transaction, simply enter the Transaction ID and the amount you wish to refund.

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**


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 \*

 \$

Send Receipt Email



**Refund**



## [Transaction Successful](#)

[Home](#) / [Virtual Terminal CC Refund](#)

**Transaction Successfully Refunded**

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

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**Transaction Receipt**

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

<b>Merchant</b>	<b>Date/Time</b>
JD Construction - (Chicago, IL)	01/19/2018 2:55:28 PM CST

<b>Transaction ID</b>	<b>Transaction Type</b>	<b>Amount</b>
3954947843	Card Refund	-15.00

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**Credit Card Information**

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

<b>CC Expiration</b>	<b>AVS Status</b>	<b>CVV Status</b>
01/19		

<b>Processor</b>	<b>Currency</b>
CC Processor A	USD

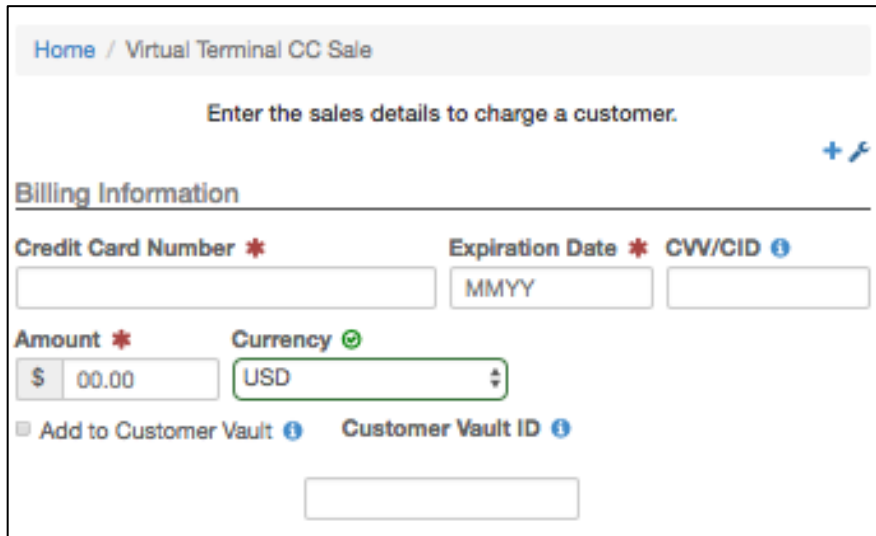
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<b>Billing Information</b>	<b>Shipping Information</b>
John Smith	US

## 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 ⓘ

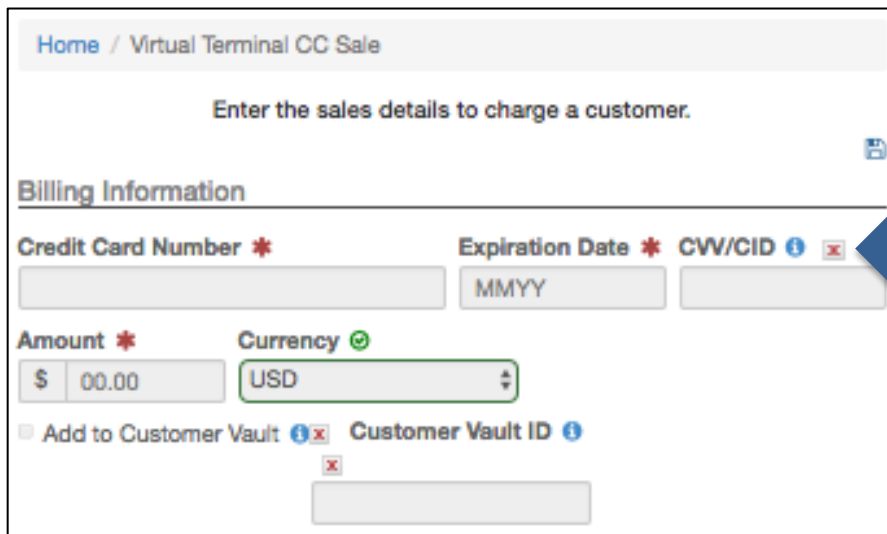
      MMY     

\$ 00.00      USD

Add to Customer Vault ⓘ      Customer Vault ID ⓘ

A blue wrench icon is located to the right of the "Enter the sales details to charge a customer." instruction.

**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 ⓘ

A blue disk icon is located to the right of the "Enter the sales details to charge a customer." instruction. A blue "X" icon is located to the right of the CW/CID field label. Another blue "X" icon is located below the "Add to Customer Vault" label.