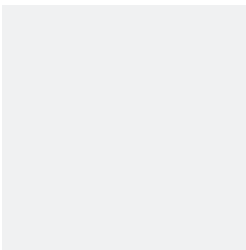
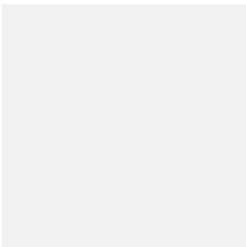
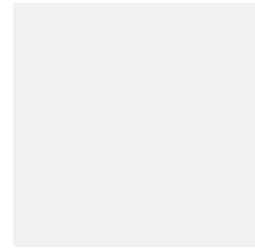
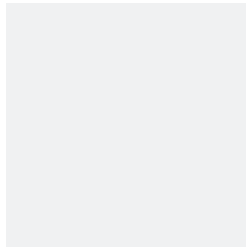
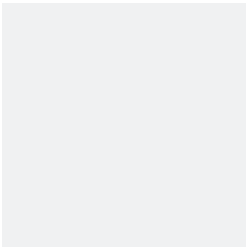


## Virtual Terminal Quick Reference Guide

### Getting Started



# What You Need

- Internet-enabled laptop or computer
- Virtual Terminal URL
- Store Number
- Username
- Password

You should receive your Virtual Terminal URL, Store Number, Username and Password through emails from Fiserv as part of your onboarding process. If you have not, please contact your local support team whose details can be found at the end of this document.

## Logging in

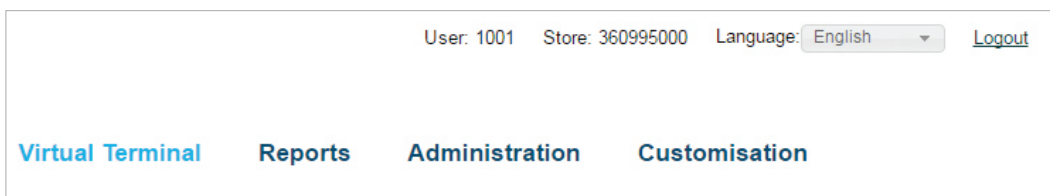
**Follow the steps below to log into the Virtual Terminal.**

**Note:** If you are logging into the administrator user account for the first time, it is important that you change your password from the temporary one that we provide. Instructions on how to change your password can be accessed via this document or the full Virtual Terminal User Guide.

1. Access the Virtual Terminal URL which we provide you via email as part of the onboarding process.
2. Enter in your storename (store ID), username and password.
3. If you want your Storename (store ID) auto-populated the next time you log in, tick the Remember me box.
4. Click Log in.

## Logging Out

To log out of the Virtual terminal, click Logout in top right hand corner.



Please note, your session will expire after 30 min of inactivity and you will need to log back in again if you want to continue using the Virtual Terminal.

## Setting up Your Receipt

You have the option of customising the header and footer of the receipt your customers receive after you enter orders into the Virtual Terminal.

**To customise your receipt, follow the steps outlined below:**

1. Click on **Customisation** on the Main Menu Bar.
2. Click on **Customise your Receipts**.

## Receipt

Enter header and footer text which will be displayed within transaction receipts you can open in the Point of Sale or the Order Detail view.

**Header**

Enter up to 24 characters in this text box. This text will appear towards the top of your receipt.

**Footer**

Enter up to 24 characters in this text box. This text will appear at the bottom of your receipt.

3. Enter up to 24 characters in the Receipt Header textbox. This text will appear toward the top of your receipt.
4. Enter up to 24 characters in the Receipt Footer textbox. This text will appear at the bottom of your receipt.
5. Click on the **Submit** button.

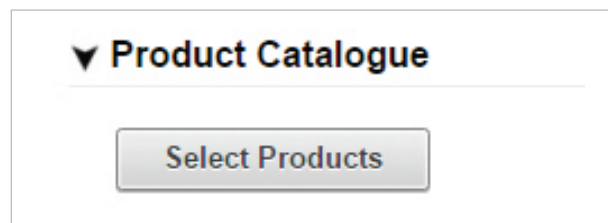
Whenever you return to this screen, your current customised text should appear in the Receipt Header and Receipt Footer text boxes.

# Processing Transactions

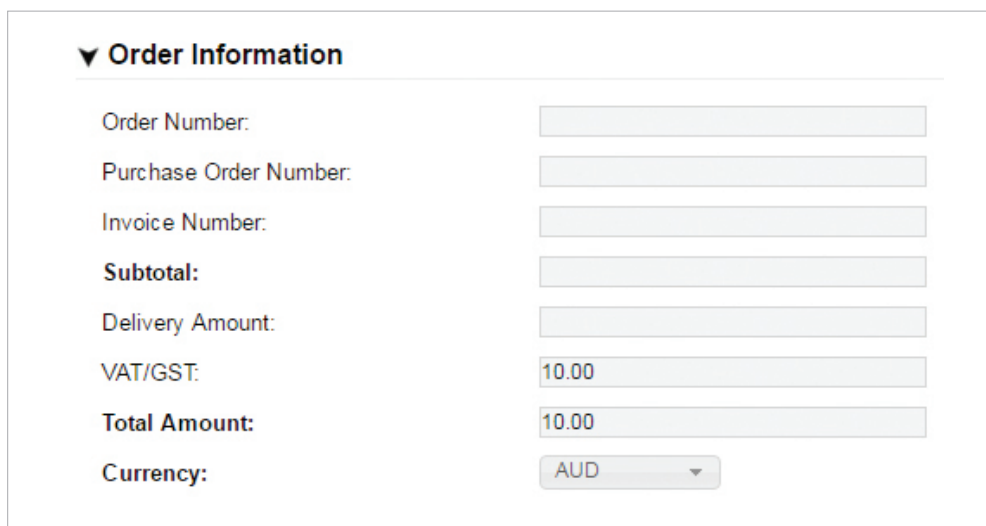
## Sale

To process a Sale transaction, you will need to have access to the Virtual Terminal section. For information on which user permissions allow this, please refer to the Administration section of this Quick Reference Guide.

1. Click on Virtual Terminal on the Main Menu Bar.
2. If you have set up a product catalogue, click select products. For more information on how this works, please refer to the full Virtual Terminal User Guide.



3. Enter Order Information. Only Total Amount is a mandatory field. You may wish to enter a delivery/shipping amount and GST. If Subtotal, Delivery Amount or GST are entered, the Total Amount field will automatically add them together.



A screenshot of a web form titled "Order Information" with a downward-pointing triangle icon to its left. The form contains several input fields and a dropdown menu. The fields are: "Order Number:" with an empty text box; "Purchase Order Number:" with an empty text box; "Invoice Number:" with an empty text box; "Subtotal:" with an empty text box; "Delivery Amount:" with an empty text box; "VAT/GST:" with a text box containing "10.00"; "Total Amount:" with a text box containing "10.00"; and "Currency:" with a dropdown menu showing "AUD" and a downward arrow.

4. Select card type from the drop-down box.
5. Select the origin of your transaction from the next drop-down box.

6. Select Transaction Type as Sale. Sale transactions charge the customer's card immediately. For more information on other transaction types, please refer to the full Virtual Terminal User Guide.

▼ **Card** Credit/Debit Card

Select card type:

Supported Card Types:  

Transaction Origin:

Transaction Type:

Card number:

Expiry date:  /

Card Security Code:

Debit / Credit:

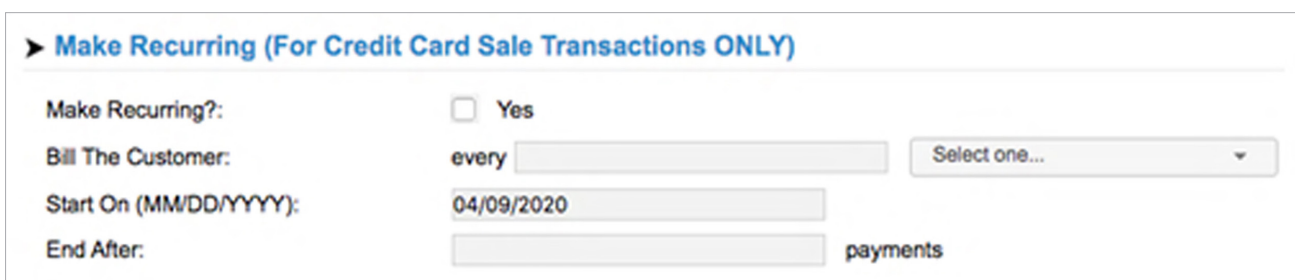
7. Continue filling out the card number, expiry date and card security code.
8. You may opt to fill in other information in Customer Details and Delivery Information or Comments. These are all optional fields. If you have enabled email notifications and you enter in an email address for your customer, they will receipt a copy of their transaction receipt via email. For instructions on how to enable email notifications, please refer to the full Virtual Terminal User Guide.
9. Click on the **Continue** button at the bottom of the page to proceed.
10. If there are data entry errors or any required fields are missing, the same page will reappear with an error message at the top and all incorrect/ missing fields flagged with a warning graphic. Make any necessary corrections, then click the **Continue** button again.
11. Please Confirm page will appear if your previous page was filled out correctly.
12. Review the details; make corrections if needed by clicking on the **Back** button, then click the Submit button.
13. A Transaction Result page will appear.

## Recurring Payment

You can set up automatic schedules of future payments. This is especially suitable if you wish to avoid contacting your customers regularly to take their credit card details.

For information on how to modify or cancel your Recurring Payments, refer to the full Virtual Terminal User Guide.

1. Follow the instructions for processing a Sale transaction. The amount you enter in the Order Information section is how much you'll charge your customer or each recurring payment.
2. To set up a schedule, tick the **Yes** box for "Make Recurring?" in the Make Recurring (For Credit Card Sale Transactions Only) section.



The screenshot shows a form titled "Make Recurring (For Credit Card Sale Transactions ONLY)". It contains the following fields:

- Make Recurring?:** A checkbox labeled "Yes" which is currently unchecked.
- Bill The Customer:** A text input field containing "every", followed by a dropdown menu currently set to "Select one...".
- Start On (MM/DD/YYYY):** A text input field containing "04/09/2020".
- End After:** A text input field followed by the word "payments".

3. Decide how often you wish to charge your customer and in the Bill the customer fields, enter a number from 1 to 999 with no decimal point and select day, week, month or year in the drop-down box. For example, if you wish to charge the customer once a year, enter the number 1 and select "year" in the drop-down box. To charge the customer twice a year (once every six months), you would enter the number 6 and select month in the drop-down box.
4. Select the Day/Month/Year you wish to start charging the customer from the Start on field.
5. Enter the number of times to charge your customer in the End After field.

## Refund

Refunds can only be made on transactions previously made through the Virtual Terminal.

1. To process a refund to a customer, click on the Return link on the top right hand corner of the Virtual Terminal page.
2. A page will appear, with a field for the order number. You will need to enter the original order number. If you don't know your order number, you can find search for it in the Reports section.
3. Click on the **Retrieve Order** button after entering in the original order number. A page will appear showing all the existing information from that order.
4. Review these fields to ensure you have selected the correct order. (You may have to expand some of the sections at the bottom of the page to see all the fields you need to see). If this isn't the right order, click on your browser's Back button to return to the previous page and retrieve an alternate order.
5. Enter the amount to return in the Transaction Amount field. By default, the fields will be prefilled with the total amount available to be returned. You can amend the amount if you wish to make a partial amount refund. For example Original transaction was \$16 but you only wish to refund \$10.

6. Update any other optional fields such as Customer Contact Information, Payment Information or Comments.
7. Click the **Continue** button.
8. If all entries in the form were valid, another page will appear asking you to confirm the information.

The screenshot shows a web form titled "Return". At the top right, there are links for "Completion" and "Return". The form is divided into several sections:

- Order Information:** Contains fields for Order Number (1234), Purchase Order Number (empty), Invoice Number (empty), Transaction Amount (16.00 up to 16.00), and Currency (AUD).
- Card:** Includes a "Credit/Debit Card" tab, "Select card type" (MasterCard), a MasterCard logo, Card Number (514813...9595), Expiry Date (12 / 2020), and Cardholder Country (Australia).
- Customer Details:** A section with a right-pointing arrow.
- Comments:** A section with a right-pointing arrow and a text input area.

At the bottom right of the form, there are two buttons: "Back" and "Continue".

9. If everything is okay, click on the **Submit** button.
10. A final Transaction Results page will appear, indicating whether the transaction was approved or declined and reiterating all the transaction information.



# Administration

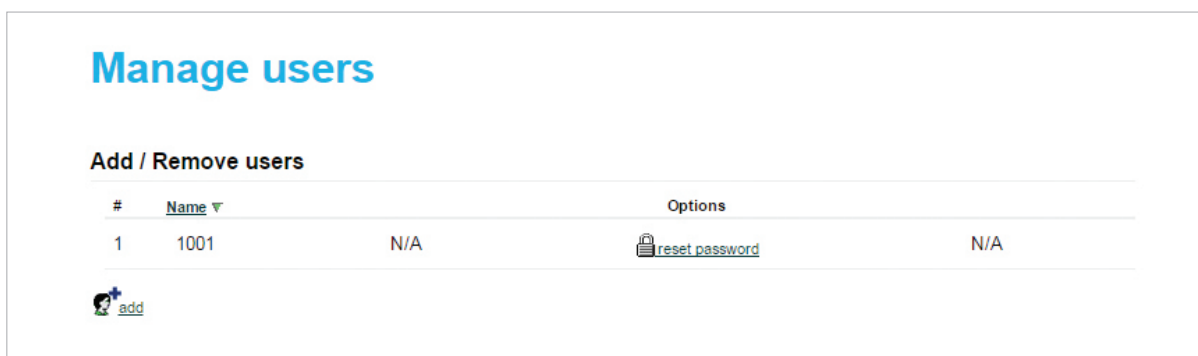
## Managing Users

You can have multiple users for one store, with various permissions. All users of one store can share the same client certificate.

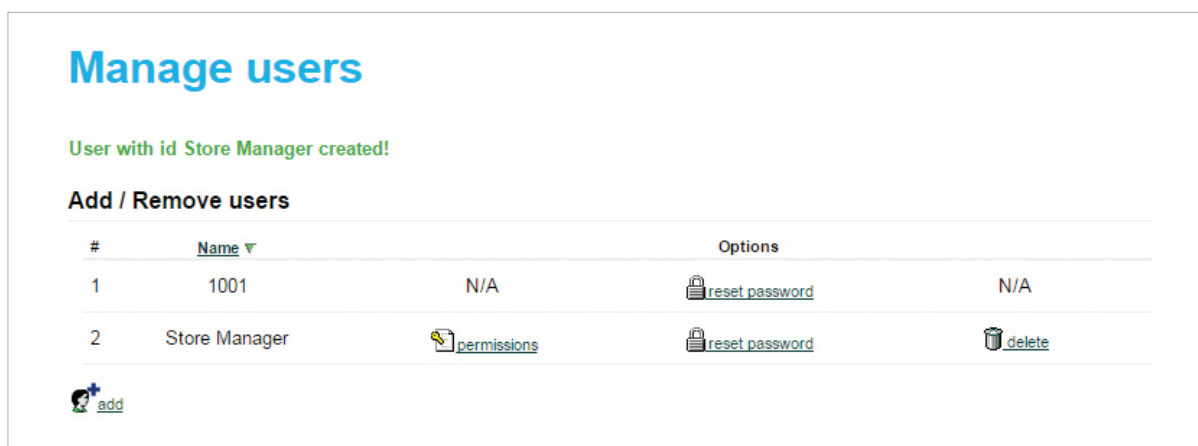
Only the administrator – the user ID and password that was provided when the store account was set up – can add or delete users and assign permissions.

## Adding Users

1. Log into administrator account (original user account).
2. Click on **Administration** on the Main Menu Bar.
3. Then click on **Add/Remove/Modify** user.
4. A list of current users will appear.
5. Click on the **Add** link located at the bottom of the page.



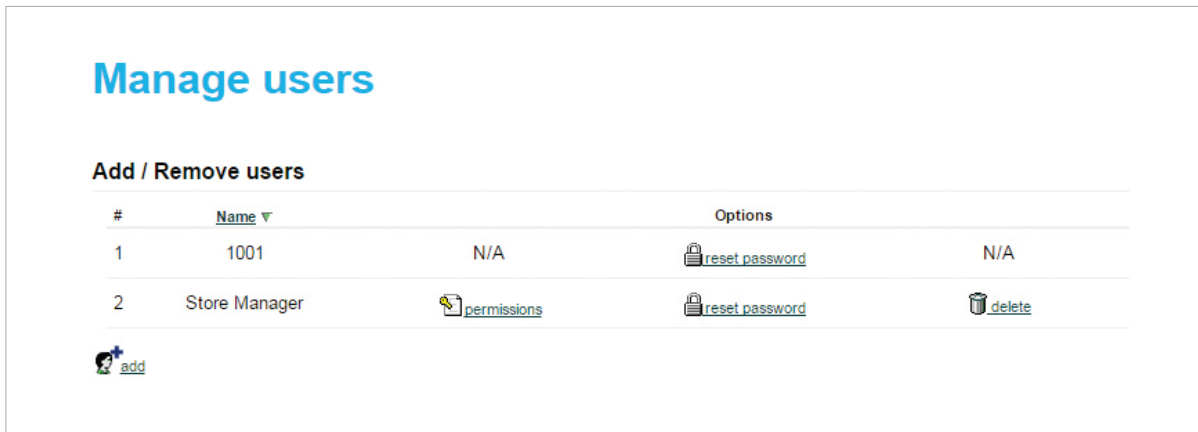
6. In the Add User screen, enter a unique Username for the new user and set a password for the user.
7. Click on the **Continue** button to create the new user.
8. The Current Users list will reappear, showing the new user on the list.



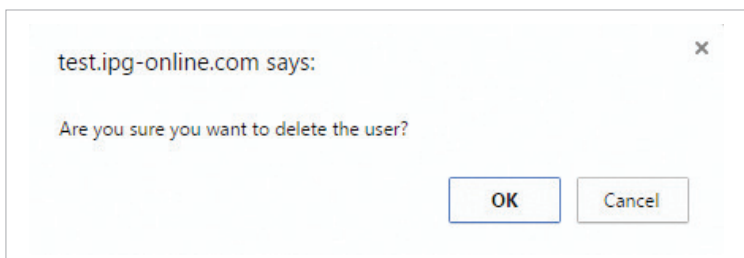
## Deleting Users

### To Delete a User

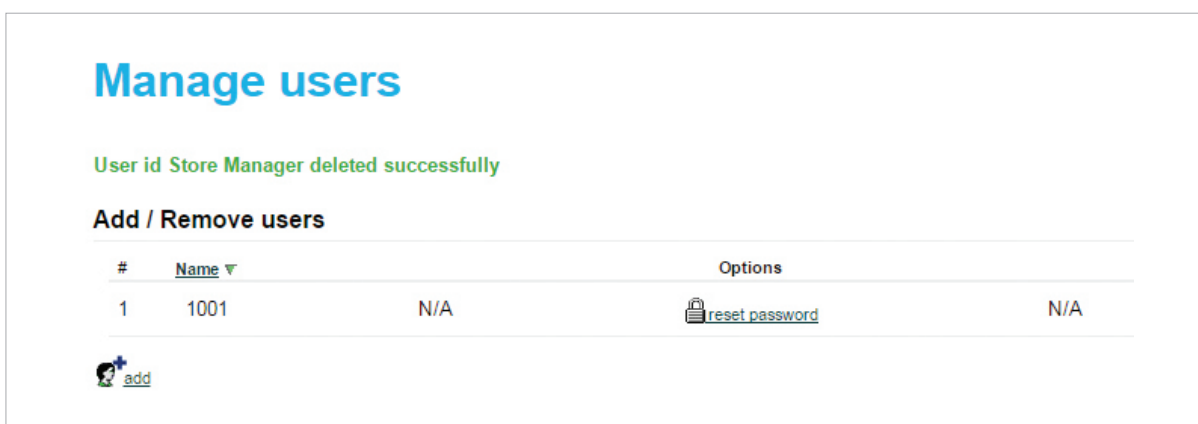
1. Click on the **Delete** link located next to the user you wish to delete.



2. A dialogue box will appear, stating that this operation will delete the selected user.



3. Click the **OK** button to delete the user or Cancel if you do not wish to delete the user.
4. Once the user is deleted, the Current Users screen will refresh, with the deleted user omitted from the list.







## Setting User Permissions

1. Click on the **Permissions** link for the user you wish to modify.

### Manage users

User with id Store Manager created!

#### Add / Remove users

#	Name ▾		Options	
1	1001	N/A	 <a href="#">reset password</a>	N/A
2	Store Manager	 <a href="#">permissions</a>	 <a href="#">reset password</a>	 <a href="#">delete</a>



2. The Edit User Permissions page will appear.

### Manage users

#### Edit user permissions

Reports	<input checked="" type="checkbox"/>
Transactions	<input checked="" type="checkbox"/>
Credit	<input checked="" type="checkbox"/>

[Back](#) [Continue](#)

3. Click on the appropriate checkboxes to turn on or off permissions for this user. You can control the user's access to View Reports, Process Transactions and/or Issue Credits.
4. Click on the Continue button at the bottom of the page.
5. You will be returned to the Current Users listing. The words updated successfully should appear at the top of the page if the change was successful.

## Permission Levels

		Permissions			
		Transaction Processing	Reporting Access	Administration	Customisation
User Roles	Administrator	✓	✓	<ul style="list-style-type: none"> <li>Change own password</li> <li>Reset others' password</li> <li>User management</li> <li>Set fraud rules</li> <li>Set email notifications</li> </ul>	<ul style="list-style-type: none"> <li>Customise fields on virtual terminal page</li> <li>Customise receipt</li> <li>Manage product catalogue</li> </ul>
	Reports	✗	✓	Can only change own password. Cannot reset own password.	✗
	Transactions	✓	✗	Can only change own password. Cannot reset own password.	✗
	Credit	✓	✗	Can only change own password. Cannot reset own password.	✗

## Changing Your Own Password

1. Log into Virtual Terminal.
2. Select **Administration** on the Main Menu Bar.
3. Click on **Change Password** link.
4. This will bring up the Change Password page.
5. Enter in your old password.
6. Enter in your desired new password twice.
7. Click **Submit**. If you did accidentally mistype your new password you will be advised that there is an error and asked to reenter the information.

## Forgotten Password Reset








Only the administrator – the user ID and password that was provided when the store account was set up – can reset forgotten passwords for other users.


1. Log into administrator account on Virtual Terminal.
2. Select **Administration** on the Main Menu Bar.
3. Click **Add/Remove/Modify** user.
4. Click on the reset password link for the appropriate user.

5. Enter in new temporary password twice.

## Manage users

**Add / Remove users**

#	Name ▾		Options	
1	1001	N/A	 <a href="#">reset password</a>	N/A
2	Store Manager	 <a href="#">permissions</a>	 <a href="#">reset password</a>	 <a href="#">delete</a>
3	Store Staff	 <a href="#">permissions</a>	 <a href="#">reset password</a>	 <a href="#">delete</a>

 [add](#)

6. Click **Submit**. If you did accidentally mistype your new password you will be advised that there is an error and asked to reenter the information.

7. The user can log in with temporary password and change their password if they wish.

# Reconciling Your Transactions/Reporting

Only users with Reports access or the administrator can view and download transaction reports.

## Viewing Reports

To view the reports, click on the Reports button on the Main Menu Bar.

### Key Reports That May Interest You Include:

- **Dashboard:** Displays summary of card sales.
- **Transactions:** Search for transactions using a variety of parameters.
- **Transaction Summary:** Displays summary of approved and/ or declined Auth and Sale transactions by card type.
- **Active Periodic Bills:** Shows information about recurring transactions you have set up and allows you to modify them.

For more information on all the reports available and how to use them, please refer to the full Virtual Terminal User Guide.

## Downloading Report Data

1. Follow the instructions for viewing reports to open the reporting which contains the data you wish to download.
2. Locate the **Export All Data** button at the bottom of the page.
3. Select your desired format from the drop-down list. Choose either CSV (Comma delimited) or XML format. CSV lists are suitable for importing into most common spreadsheets or databases. XML format is helpful for applications that allow you to import XML.
4. Click on the **Export All Data** button to download the data and either open or save it.

# Support Contacts

Visit the “[Client Support](#)” page at [FirstData.com.au](#)

A comprehensive user guide to the Virtual Terminal can be downloaded on our website. The site is equipped to keep you up to date with news, forms and guides, security and fraud prevention information, access to our online reporting tool and much more.

Or call **1800-243-444**

Our dedicated team of experts can assist you over the phone 24/7 with questions, problem resolution and extra training. Keep your merchant ID number handy when you call, this will help speed up your enquiry.



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