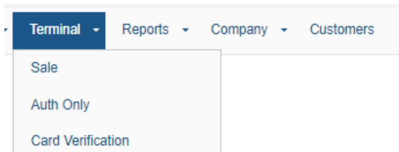
TranSafe VT Guide

Virtual Terminal

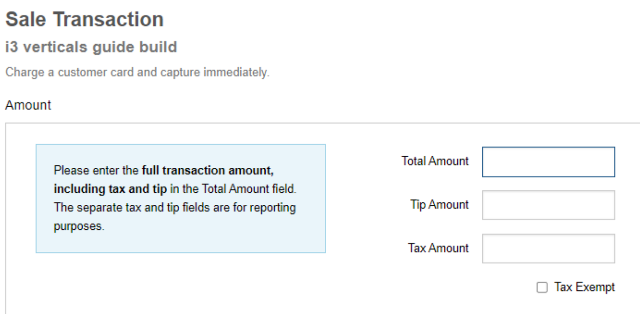
The VT is the screen where you can run transactions.

Sale

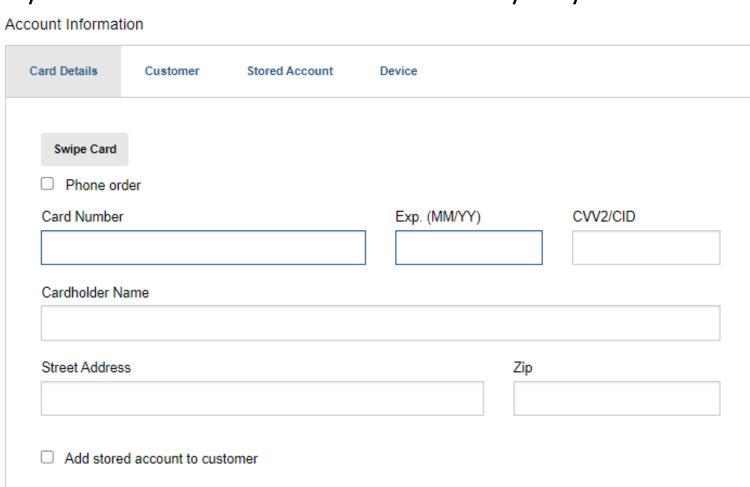
1. Click **Terminal** and then **Sale**



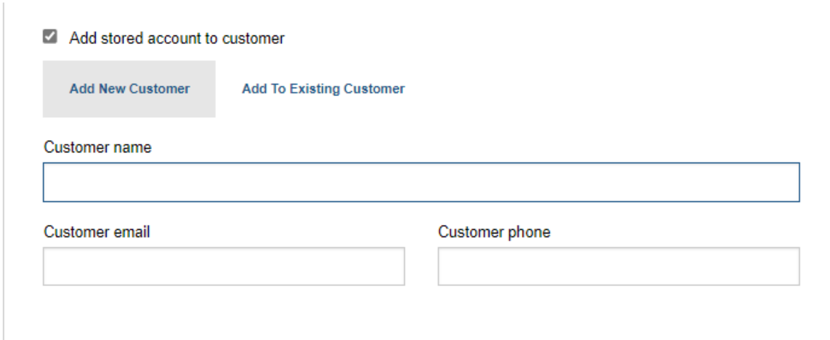
2. Enter the **Total Amount** of the sale you want to run. The **Tip amount** and **tax Amount** are for reporting purposes only on the VT. Select the Tax Exempt box if you do not wish to enter tax.



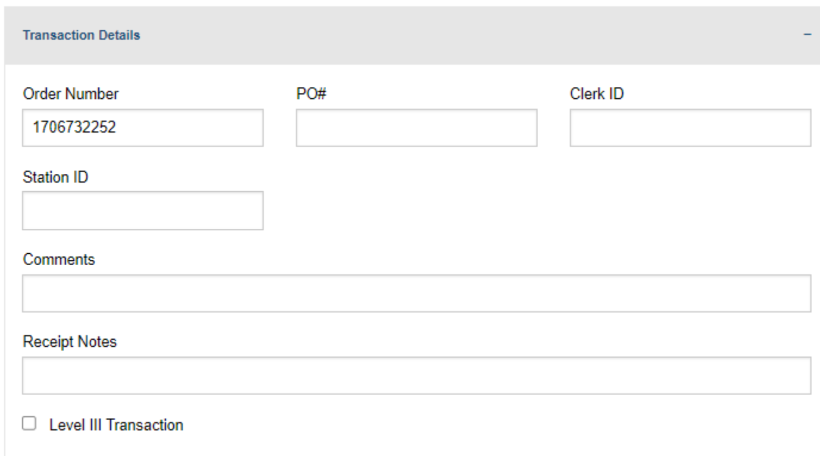
3. You can choose **Card Details**, **Customer**, **Stored Accounts**, or **Device** depending on how the card will be taken. The **Card Details** are used for keyed sales, and **Devices** are used to trigger a pin pad to insert or tap a card. The **Customer** and **Stored Account** tab pulls from their respective databases for the card numbers. The fields in *blue* are *required,* while the others are optional. It is recommended to enter the address and zip for the best rates and CVV for fraud prevention on keyed sales. The cardholder names are only for your records.



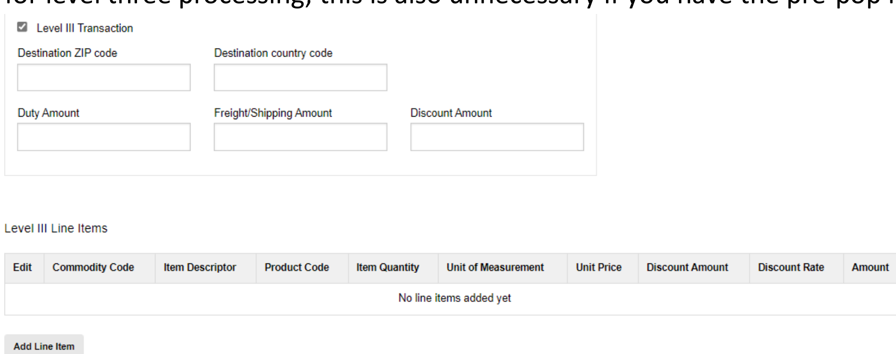
4. If you need to add the customer, click **Add stored account to customer.** This will allow you to add the card information to a new or existing customer.



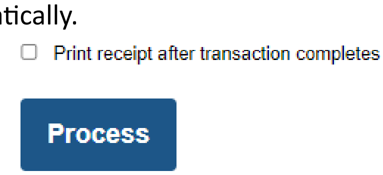
5. You can also fill in any of the additional **Transaction Details** shown below. You can request custom fields to be added by Tech support.



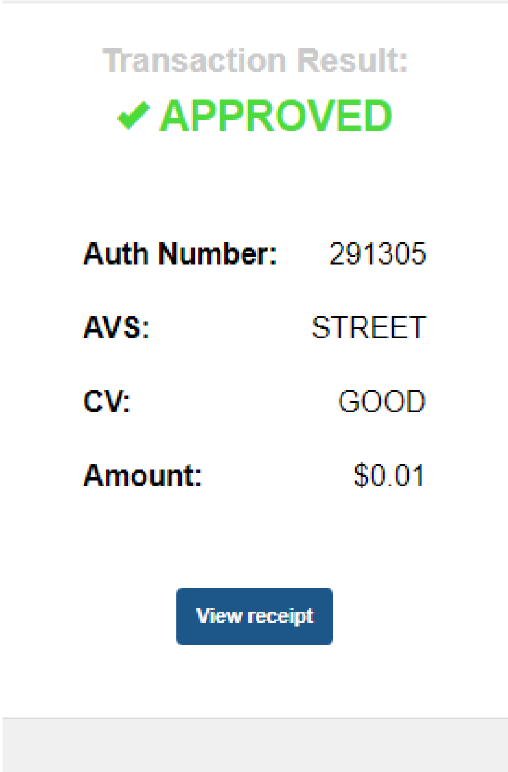
6. If you want to add line items manually, you can do so by pressing the **Level III Transaction**. This is for level three processing; this is also unnecessary if you have the pre-pop level three enabled.

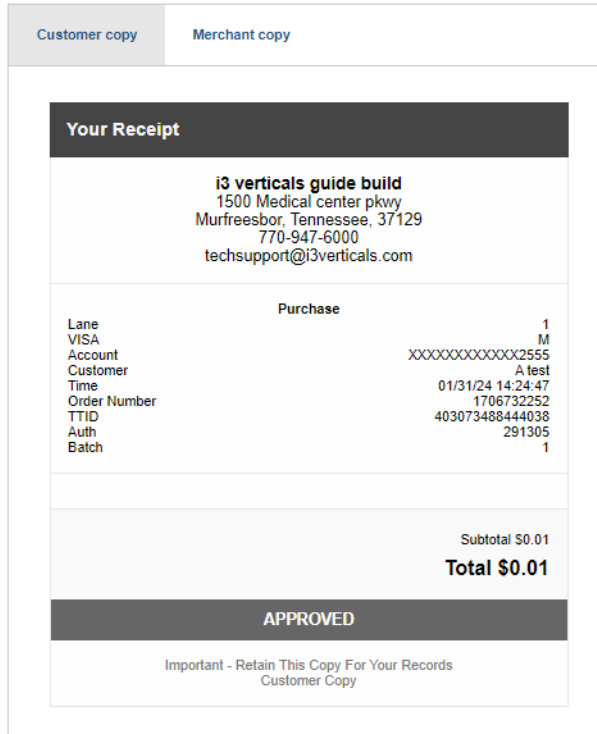


7. Once you have completed filling in your information, press the **Process** button to run your transaction. If you have a Move pin pad, you can select the option to print the receipt automatically.

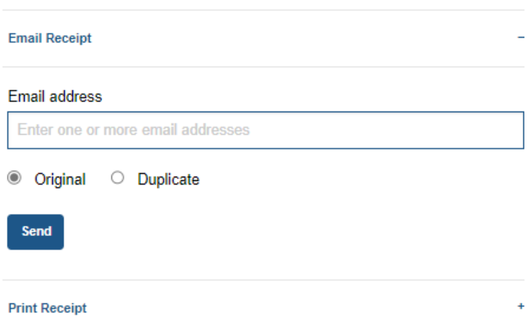


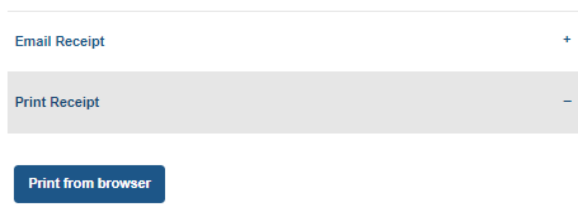
8. Once the sale is approved or declined, you can view the receipt by clicking the **View Receipt** button. All transactions are given a **TTID,** which is a **TranSafe Token ID.**





9. Then, you will see the options to either **Email Receipt** or **Print Receipt**.





Auth Only

1. The **Auth only** transaction is run the same as the sale; however, this transaction will only place the funds on hold until you **Capture** the sale under the **Uncaptured Transactions** Report.

Card Verification

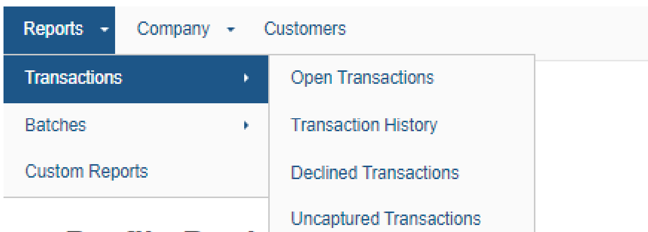
1. The **Card Verification** Transaction is used to verify AVS information on a card.

Reports

The reports can be classified into three types: open, settled, and declined. The reports for transactions in an open batch are the **Open Transactions, Open Batches,** and **Uncaptured Transactions** reports. Then, the settled sales are seen in the **Settled batches** and **Transaction History** reports**.** Then there is the **Declined Transactions** report that lists any TranSafe or Host declines/errors.

Transactions

- **Open Transactions**: show transactions in the open batch
- **Transaction History**: shows transactions that have been settled.
- **Declined Transactions**: show the declined transactions.
- **Uncaptured Transaction**: show the auth-only sales, these can be captured.

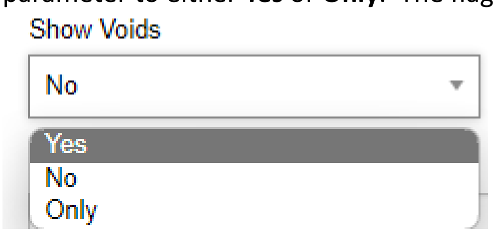


Advance options

When pulling reports up under **Transactions** you will have **Advanced options** that will allow you to search by different parmerters: **Date range,** Batch, Route, **User, Order Number, PO#, TTID, clerk ID, Station ID, or filter by Card type, TranSaction type, or transaction flag**.

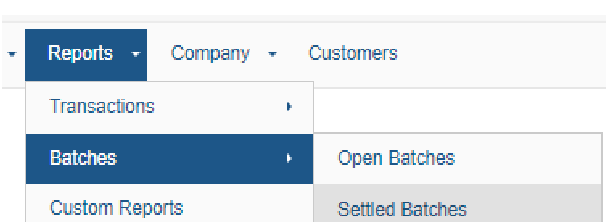
Voided sales

If you want to see voided sales you must come in **Advance options** and change the **Show Voids** parameter to either **Yes** or **Only**. The flag defaults to **No**



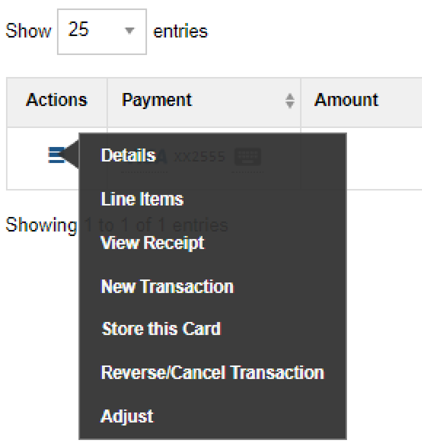
Batches

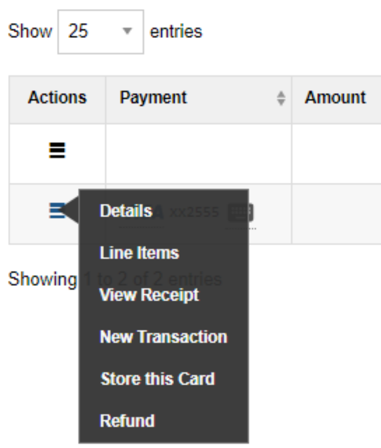
- **Open Batches**: show the current open batch
- **Settled Batches**: Show the past closed batches in a summary,



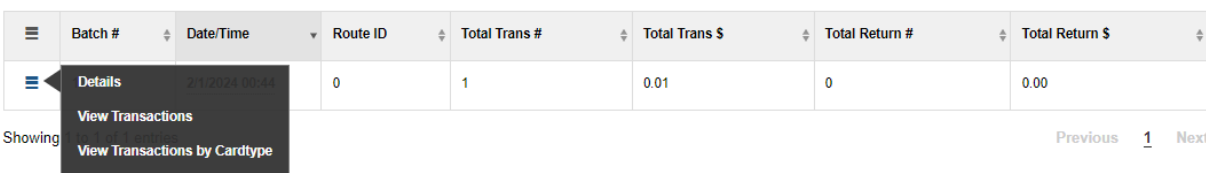
Actions menu

When looking at a sale or specific items in TranSafe, you will have three lines that will allow you to pull up an **Actions** menu. You will see different options depending on the item you are looking at. For example, when the sale is in an open batch, you can **Adjust** a sale and have the option to void the sale with the **reverse/cancel transaction** button. However, once the batch closes, that option turns to **Refund**. The **Details** will allow you to see details of the sale and **Line Items** the line items you added to the sale. **View Receipt** will allow you to view, email, or print the receipt. You can also run a sale using the same card info with the **New Transaction** button as well as save the card with **Store this Card**.



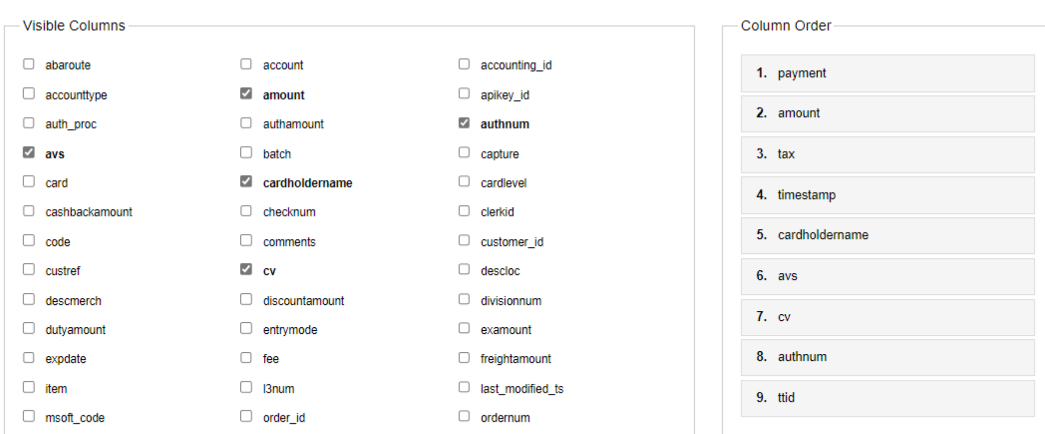


When looking at the Settled Batches, you can view the individual transactions by batch by selecting **View Transactions** in the menu. **Details** will only give you the details of that batch.



Custom reports

You can save any report as a custom report. Once you give it a name, you can select **Edit** to customize and show the information you need in the order you want it by changing the **Column Order.**

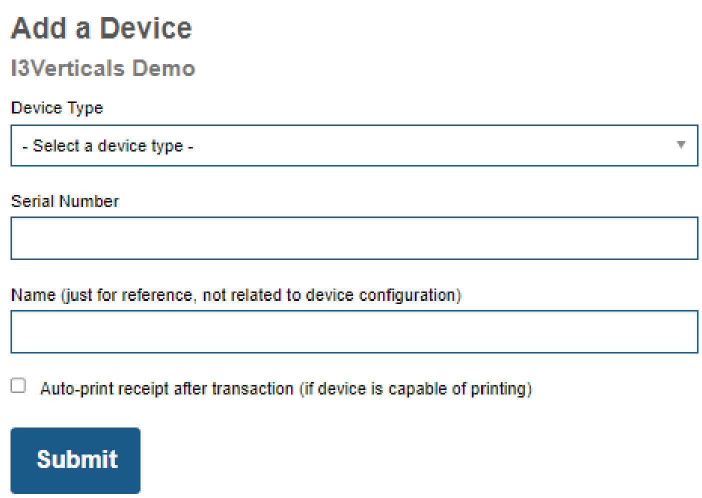


Devices

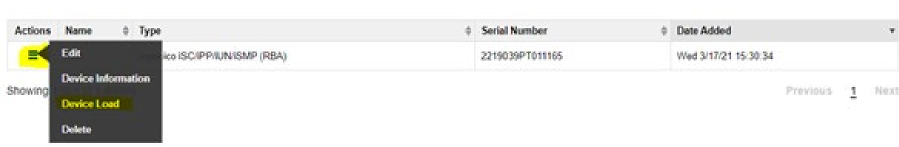
This is where you add devices you will use through the VT. If using an API, you can add the device through the endpoint system and will not see the device within the TranSafe portal with no issues.

1. From your Transafe Dashboard screen, hover over **Company** at the top of the screen and select **Devices**.
2. Once you are in the Devices screen, you will need to select **Add Device**.

3. Once you are on the screen to add your device, you will need to select the **Device Type**(which, depending on what you're using, depends on the option you're supposed to choose. i.e., Move5000 needs a device type of UPP, or iPP320 needs a device type of RBA.)



4. Next, you need to add the device's serial number.
5. To add the serial number, please press 0000 on your device, and down where it says Injected Serial Number, please add that to the **Serial Number** box in Transafe.
6. Next, you will need to add a **Name** for the device. The names are only to help you identify the device.
7. Then **Submit**.
8. Once you have submitted it, you should see the device added successfully.
9. Lastly, select the **Action menu** to the left of the device you just added and choose **Device Load**. This will complete the process of adding a device.



10. You can now run a transaction on the device.

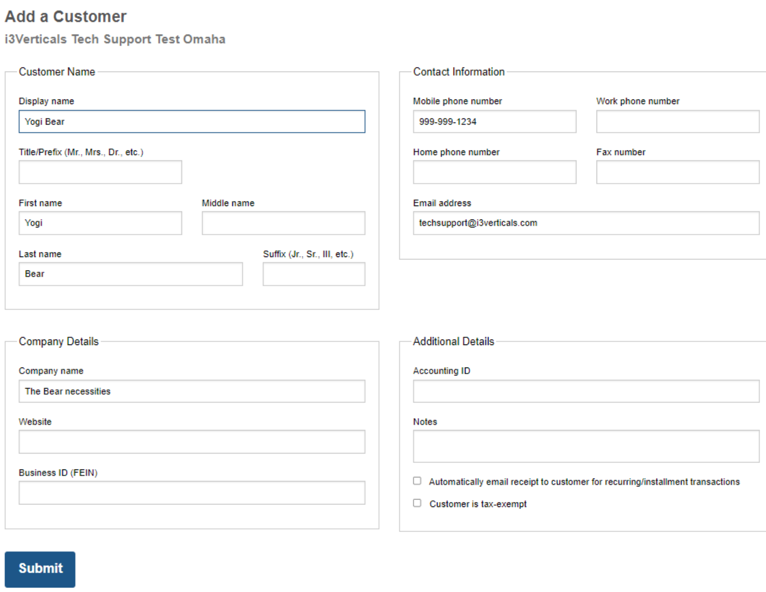
Customer Database

The Customer Databases allow you to hold multiple Stored Accounts or Addresses of a customer. It will also allow you to add an email address to the customer.

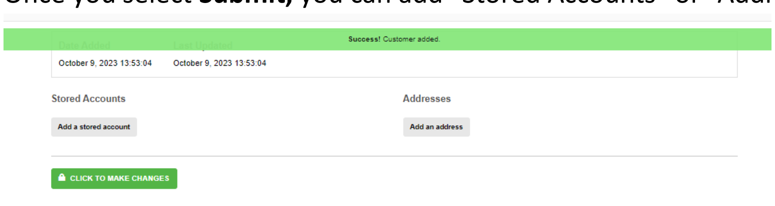
Customer

1. To add a customer, click **Customers**.

2. Fill in all the needed data for your customer; the only requirement is the "Display Name."

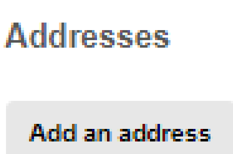


3. Once you select **Submit,** you can add "Stored Accounts" or "Addresses."

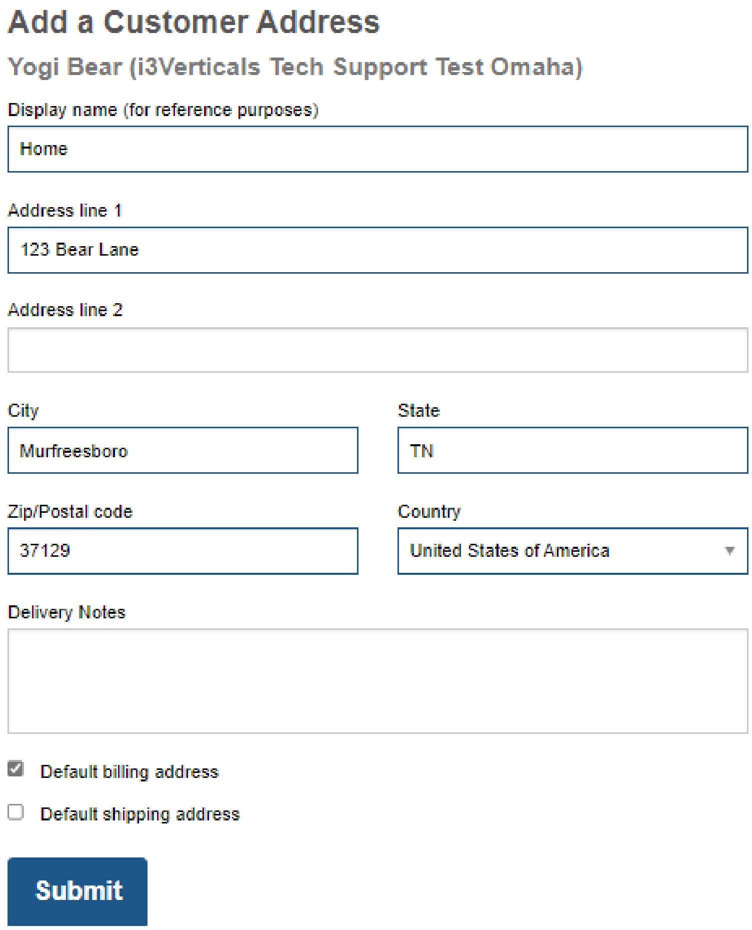


Addresses

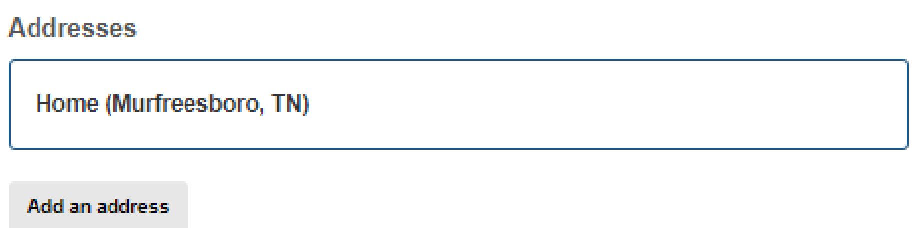
1. To add an address, select **Add an Address**.



2. The “Display Name” is only to reference the address; fill in the required fields in blue. Select **Submit.**

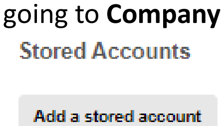


3. Once completed, it will look like the one below.

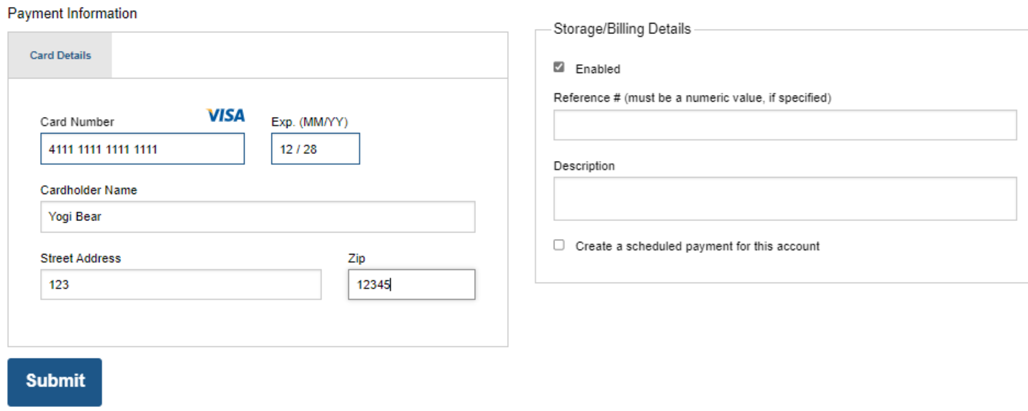


Stored Accounts

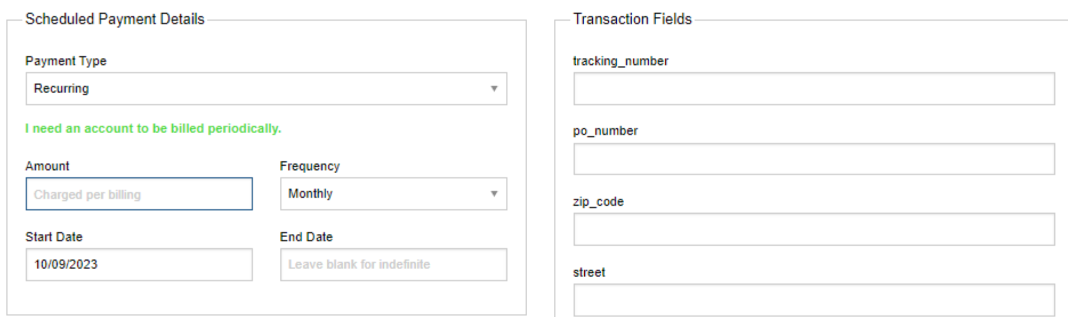
1. To add a stored account, select “**Add a stored account**.” You can do this from a customer or by going to **Company** and **Stored accounts**



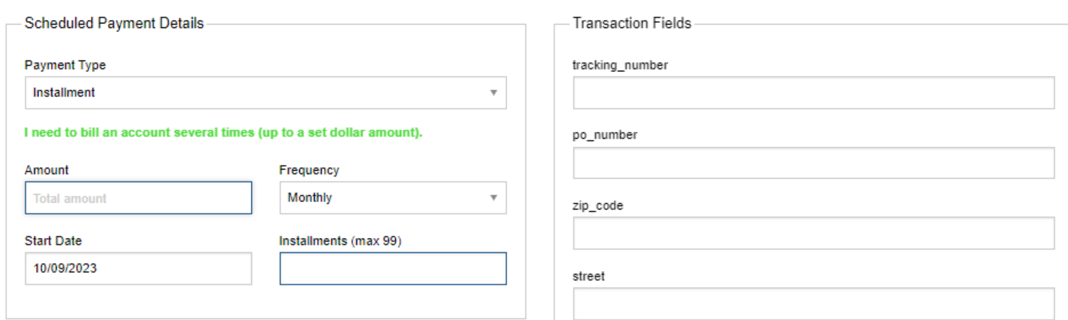
2. Then, you must fill in the Payment information; only the “Card Number” and Exp (MM/YY) are required fields.



3. To create a Recurring or Installment payment, select the check box. “**Create a scheduled payment for this account**”. Installments will end after so many payments while recurring payments will end on a date or go indefinitely if no date is selected. Select **Submit** when done.



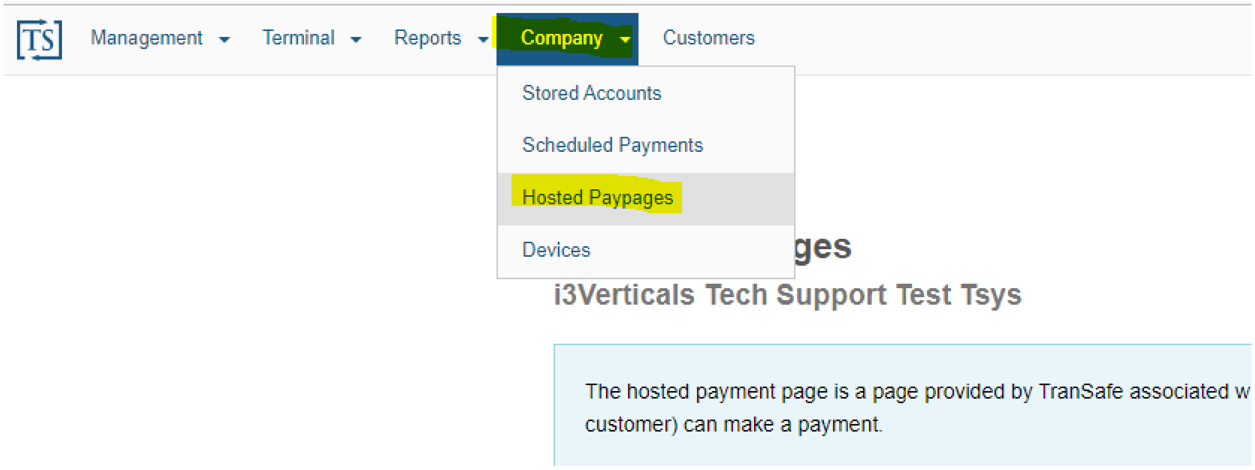
- or -



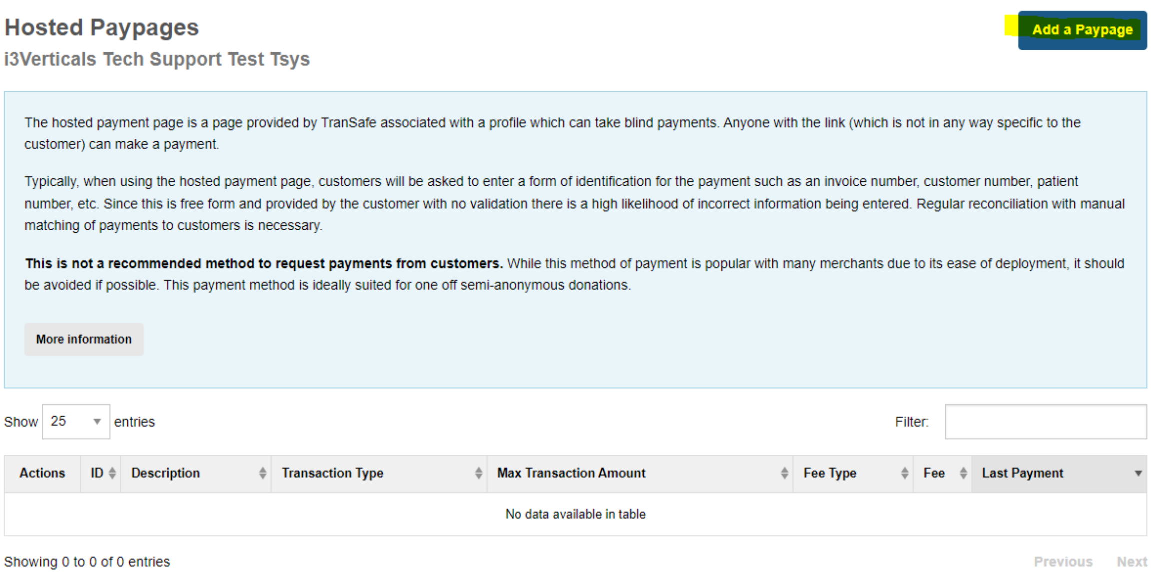
4. Once complete, this will take you to the stored account section and show any other stored accounts in the system.

Hosted PayPages

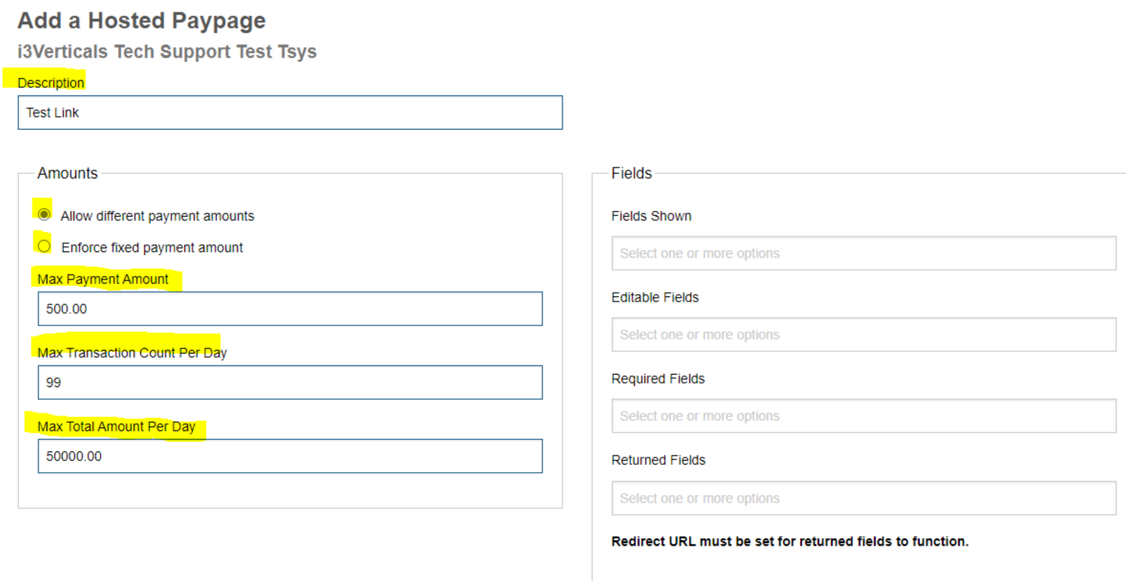
1. To create a hosted pay page, go to **Company** and then **Hosted Paypages.**



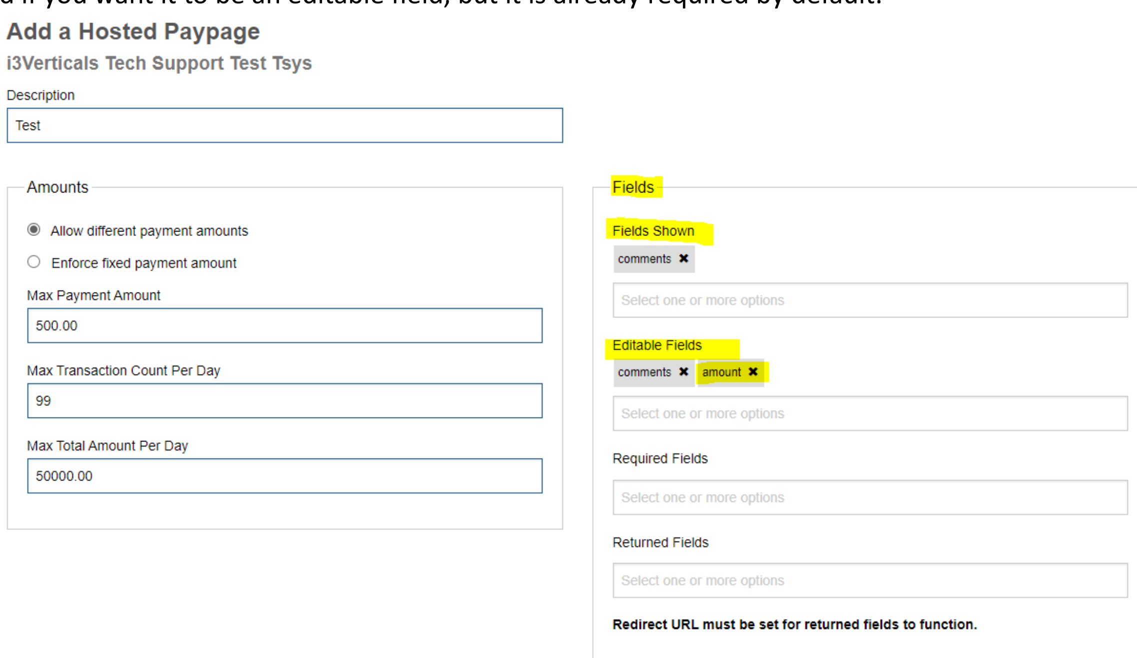
2. Select the button "**Add Paypage**" to start the creation.



3. From here, you will want to give your Hosted page a name in the “Description,” then select if you will allow **Different Payment amounts** or **Enforce fixed Payment amount**. You must also enter a **Max Payment amount**, **Max Transaction Count Per Day,** and **Max Total Amounts Per Day**.

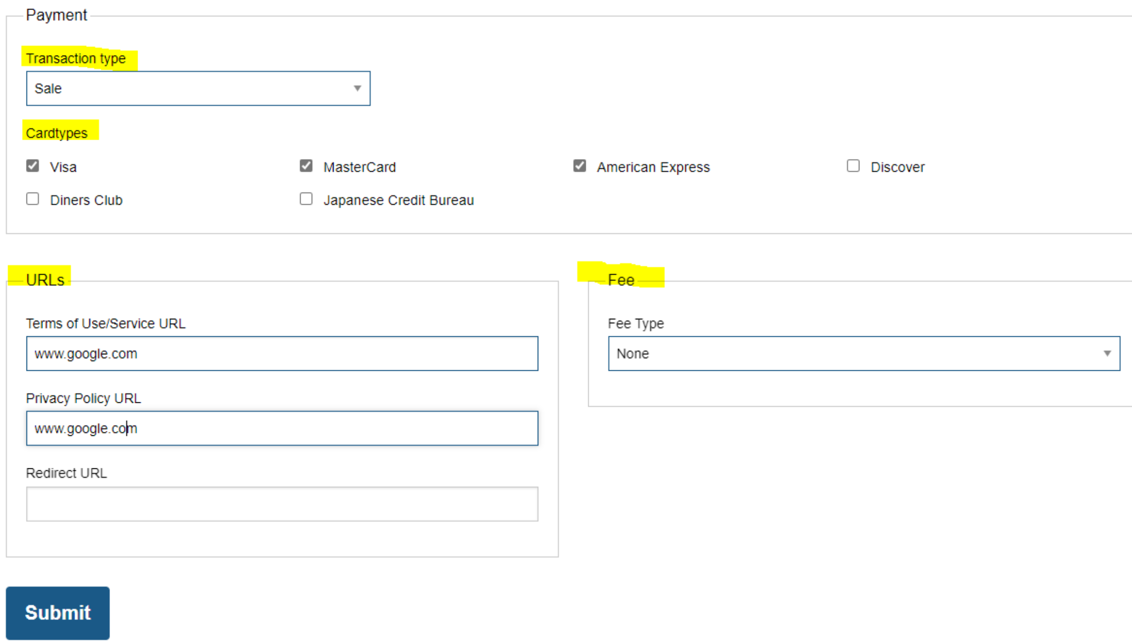


4. The Hosted Paypage default required fields are the *Amount, Card Number, Exp, CV, Card Holder Name, Street Address, Postal Code, and Email*. For other fields you want displayed on the page, select them under “Fields Shown.” If you wish to make those fields editable and/or required, select them under the “Editable Fields” or “Required Fields” sections. This includes the amount field if you want it to be an editable field, but it is already required by default.

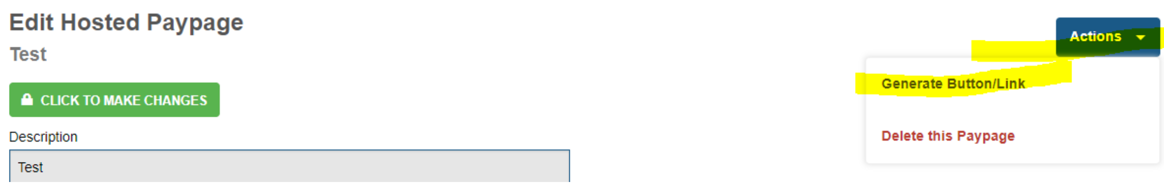


The “Returned Fields” send information back to the URL provided in “Redirect URL” (Devs only)

5. Then select the “Transaction type,” either “Sale” or “Preauth,” depending on what you want the transaction to run as, then select the “CardTypes” you want taken. The “Privacy Policy URL” and “Terms of Use/Service URL” are from the business directly. If a fee is wanted on the link, you will need to select the “Fee Type” of either “Percentage” or “Fixed Amount” and then enter a “Fee Amount” and a “Fee Name.” Then press **Submit**.



6. Now, the Hosted Paypage is created. Select the **Actions** menu if on the main “Hosted Paypages” screen or if on the “Edit Hosted Paypage” screen, press **Actions,** and then select “Generate Button/link.”



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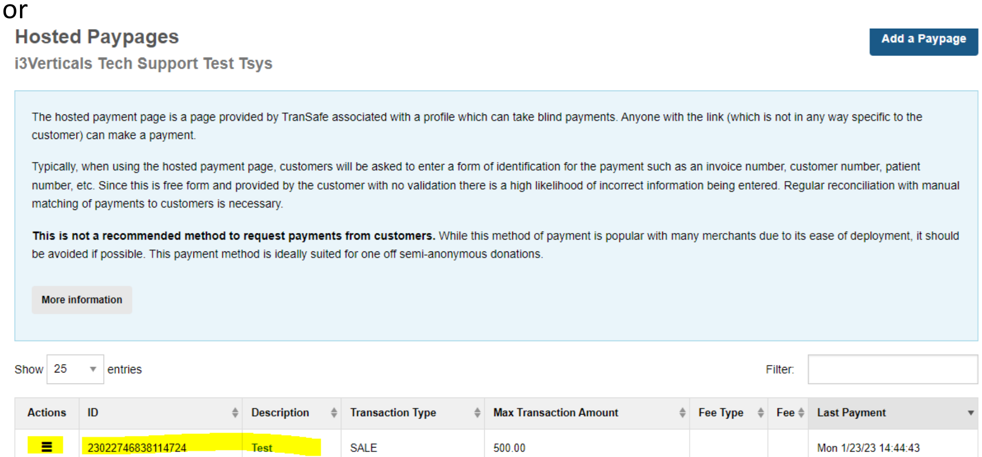
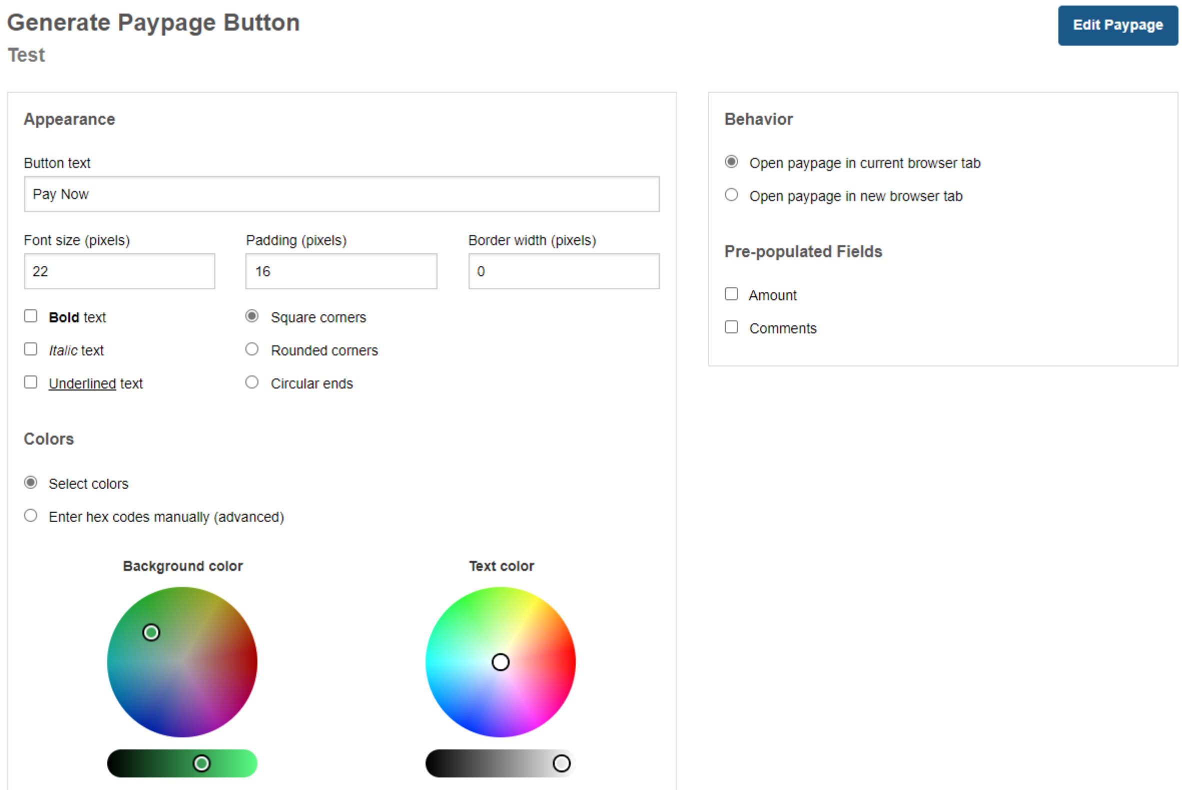
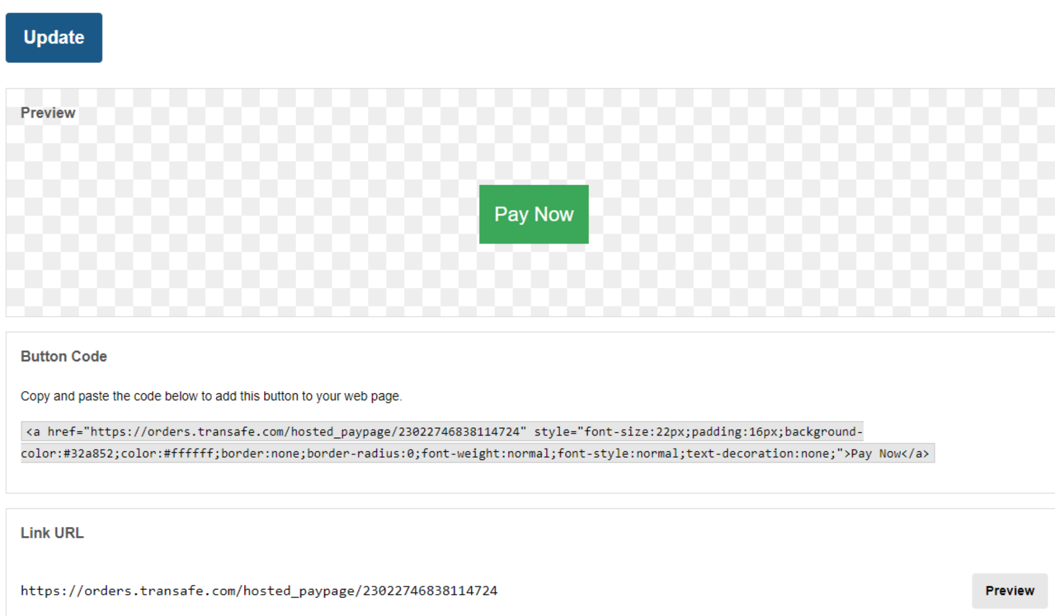


7. You will have the option to edit and update the look of the button or place pre-populated data in the fields of the Hosted Paypage, along with deciding if the link will launch in the current browser tab or a new tab.

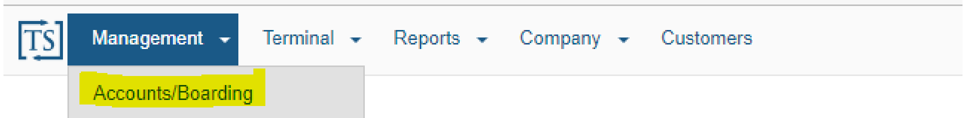


8. Once you have completed your edits to the Button and link, select **Update** to save your changes, and then you have the link or the button code at the bottom of the screen ready to use.



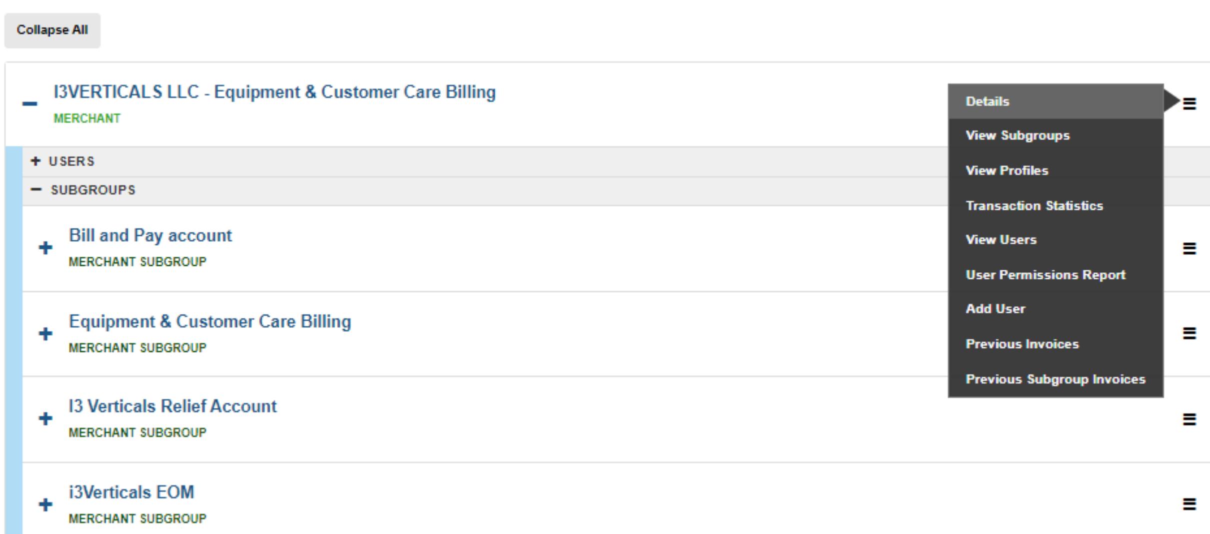
Users

1. Go to **Management** in the upper left-hand corner and select **Accounts/Boarding.** This can only be accessed if have permissions to User or . Please speak to the admin user of the account to add this permission for you.

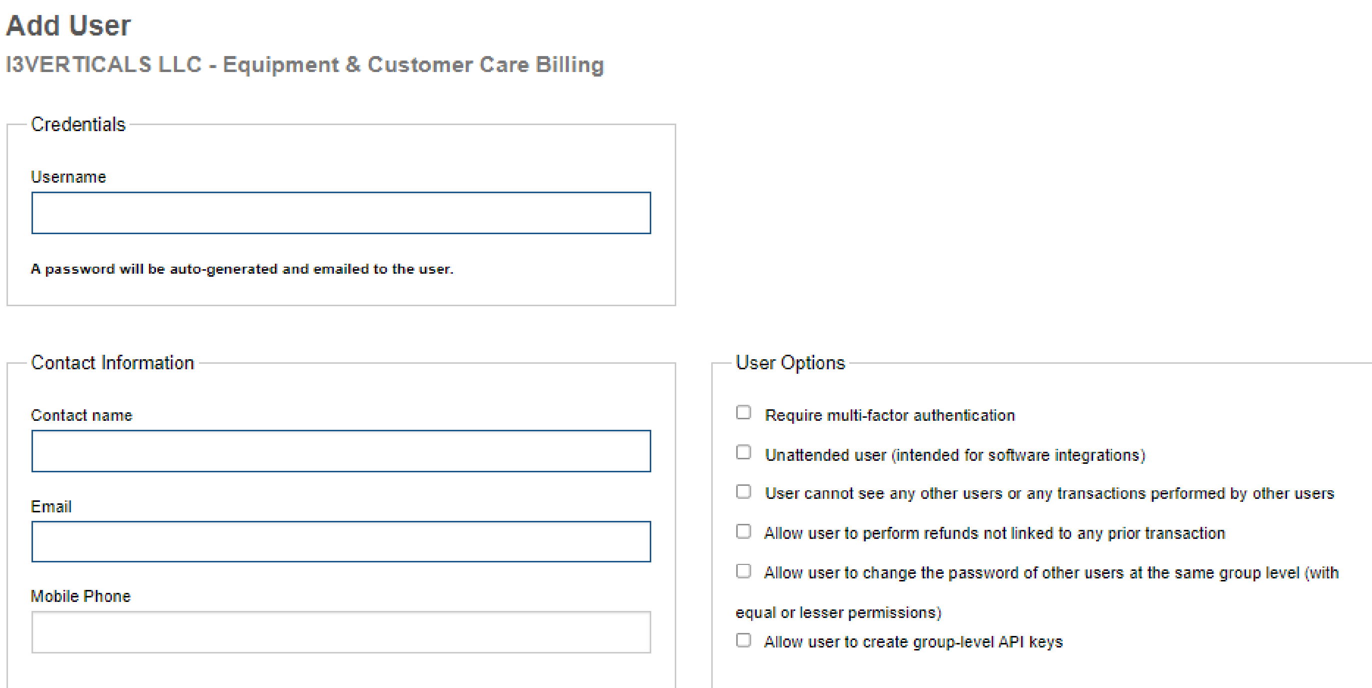


2. Depending on your access to multiple accounts, you may see a list of **Users, Merchants,** or **Merchant Subgroups**.

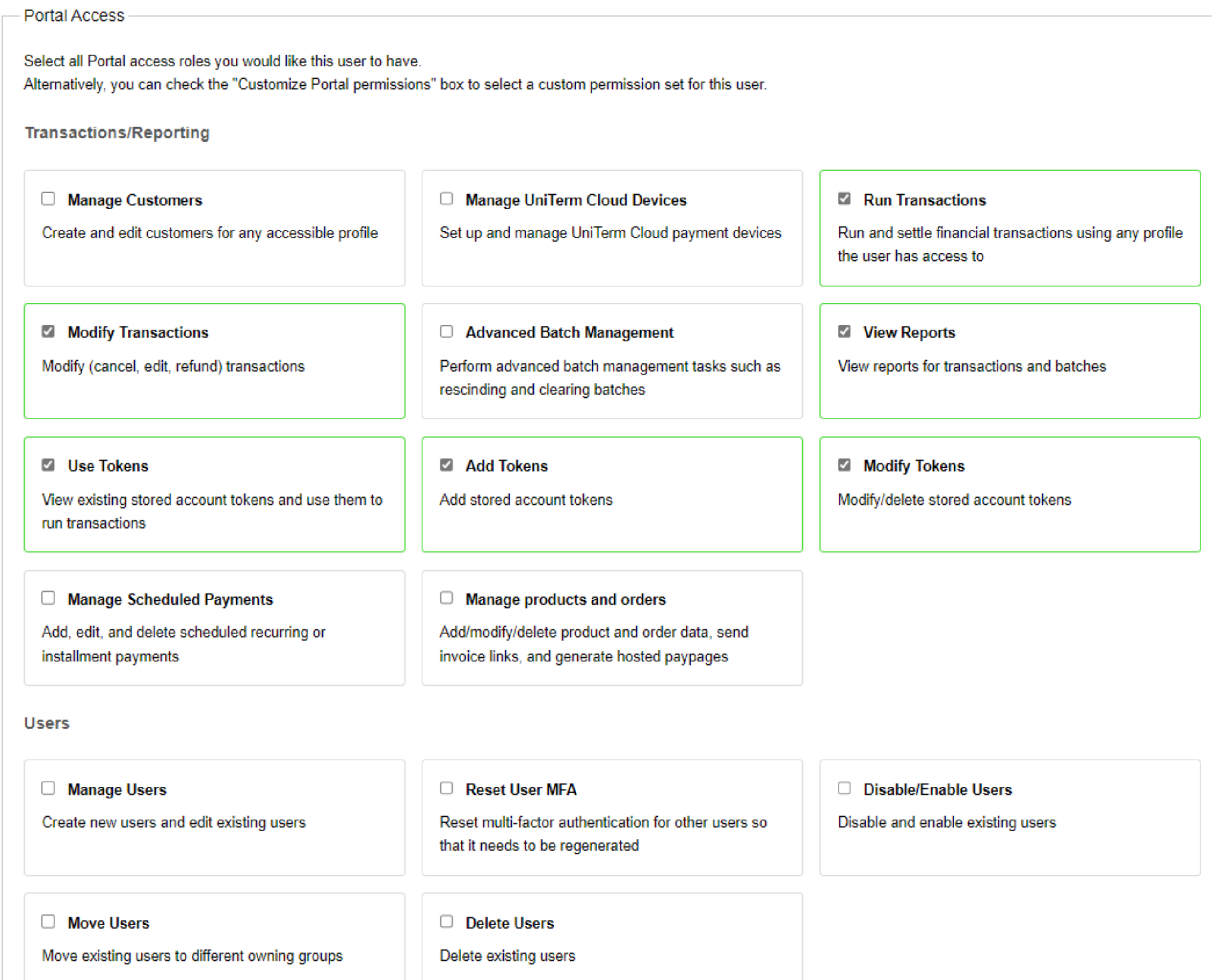
3. Select the Menu next to **Merchant** or **Merchant Subgroup** to access the option **Add User**. Not all accounts have subgroups; when you place users under a subgroup, they can only access the Profiles connected to that subgroup. If you create the User under the Merchant, they will have access to all the Subgroups and Profiles under that Merchant.



4. Once you are at the add user screen, the required fields are the Username, contact name, and email address. You will have some user options to the side, and here are the descriptions.
    a. **Require Multi-Factor Authentication**: turn on Multi-Factor Authentication on the user.
    b. **Unattended user**(Intended for software integration): This is designed for software integrations or possibly mobile apps; the passwords won't need to reset; however, the user cannot log in to the VT
    c. **User cannot see any other users or any transactions performed by other users**: User can only see their sales.
    d. **Allow user to perform refunds not linked to any prior transaction**: Gives access to Blind refunds (refunds without a corresponding sale)
    e. **Allow user to change the password of other users at the same group level (with equal or lesser permissions):** Allows user to change passwords of users with the same permissions and lower.
    f. **Allow user to create group-level API keys**: Allows the user to create API keys for the group.



5. Next, you will give the user access to what options you want them to have within the VT. The options highlighted in green are the defaults that pop up when you initially create a user. You can give the user access to the described options by checking the boxes.



Portal Access

Select all Portal access roles you would like this user to have.
Alternatively, you can check the "Customize Portal permissions" box to select a custom permission set for this user.

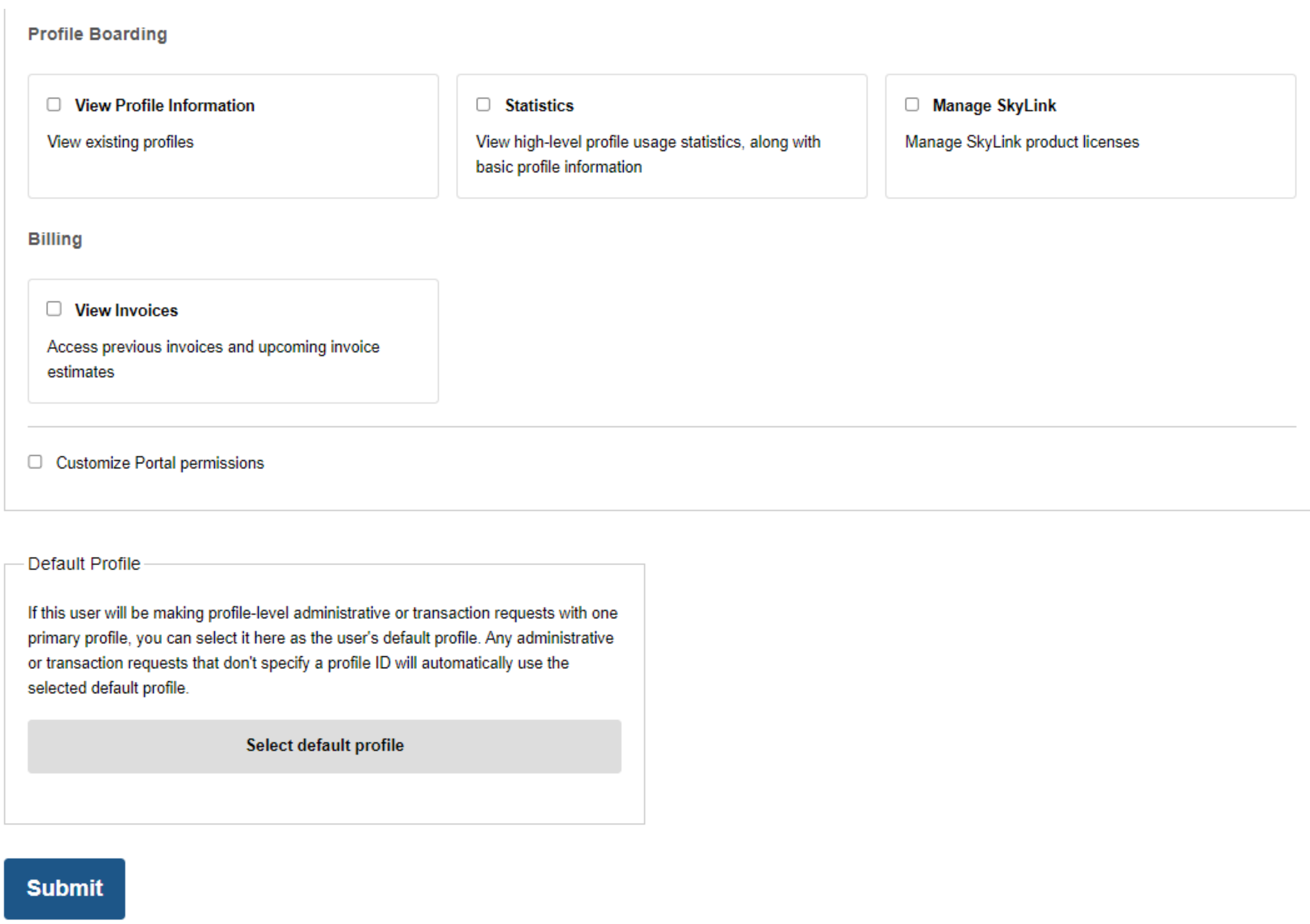
Transactions/Reporting

- [ ] **Manage Customers**
  Create and edit customers for any accessible profile
- [ ] **Manage UniTerm Cloud Devices**
  Set up and manage UniTerm Cloud payment devices
- [x] **Run Transactions**
  Run and settle financial transactions using any profile the user has access to
- [x] **Modify Transactions**
  Modify (cancel, edit, refund) transactions
- [ ] **Advanced Batch Management**
  Perform advanced batch management tasks such as rescinding and clearing batches
- [x] **View Reports**
  View reports for transactions and batches
- [x] **Use Tokens**
  View existing stored account tokens and use them to run transactions
- [x] **Add Tokens**
  Add stored account tokens
- [x] **Modify Tokens**
  Modify/delete stored account tokens
- [ ] **Manage Scheduled Payments**
  Add, edit, and delete scheduled recurring or installment payments
- [ ] **Manage products and orders**
  Add/modify/delete product and order data, send invoice links, and generate hosted paypages

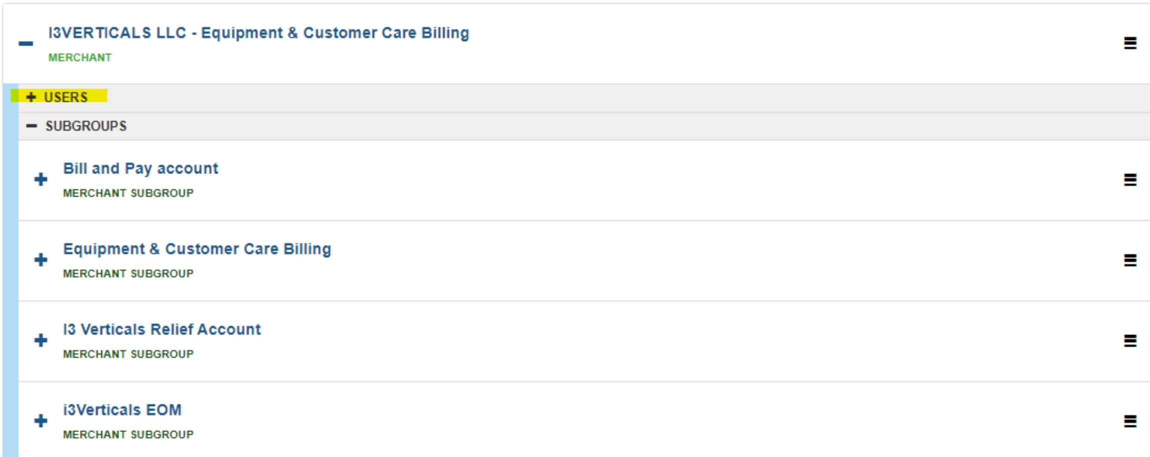
Users

- [ ] **Manage Users**
  Create new users and edit existing users
- [ ] **Reset User MFA**
  Reset multi-factor authentication for other users so that it needs to be regenerated
- [ ] **Disable/Enable Users**
  Disable and enable existing users
- [ ] **Move Users**
  Move existing users to different owning groups
- [ ] **Delete Users**
  Delete existing users

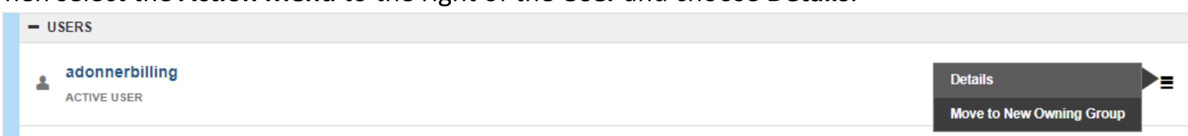
6. *(Multiple profiles only)* If creating a **User** who needing to see multiple **Profiles**, they must have **View Profile Information** permissions to switch between the profiles. Giving them access to **Statistics** will allow them to see the different profile statistics. The user will need to be built under the **Merchant** or **Merchant Subgroup,** depending on what profiles they need access to. If you attach a **Default profile** to that user they will immediately log in viewing that profile and must choose **Management** to see the other accounts.
7. If you are a merchant billed by TranSafe directly for gateway fees, you will have access to see your Transafe invoices, so you will have options to **View Invoices**.
8. There is a **Customize Portal Permission**" view that allows you to see the indivudual options that make up these groups to customize the users; however, that is recommended for developers or users familiar with the API as some options require selecting other options to function correctly. Once you have chosen your options, select **Submit.**



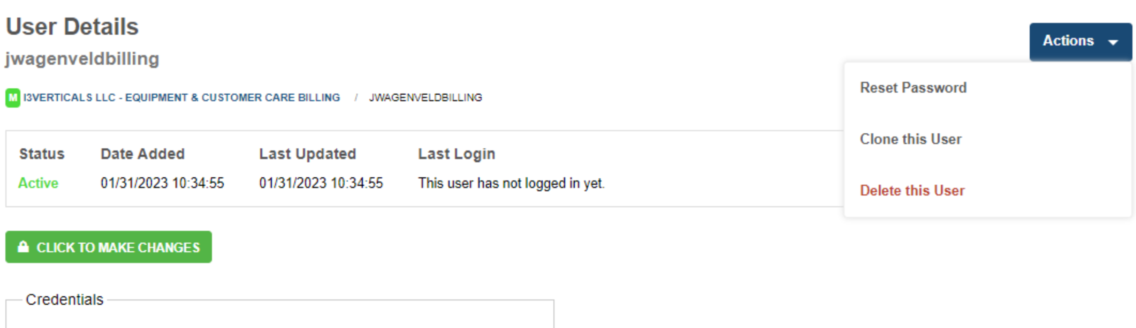
9. To edit a **User**, Select the plus next to **Users** to see the list of users.



10. Then select the **Action Menu** to the right of the **User** and choose **Details**.



11. You can change the user by clicking **Click to make changes**. Or, under **Actions,** you can **Reset Password**, **Clone this User**, or **delete the user**.



If you have issues, please contact us at 888-311-5203 or contact us at TranSafesupport@i3verticals.com