VIRTUAL LINKPOINT SM

USER'S MANUAL

FOR CUSTOMER SERVICE CALL:

(800) 456-5989, Extension 4000

Virtual LinkPoint User's Manual

Manual Version Number 2.0

Published: March 1999

Printed In The United States Of America.

Copyright © 1999 LinkPoint International, Inc. All Rights Reserved.

Under The Copyright Laws, No Part Of This Publication Confirmation May Be Copied, Distributed, Stored In A Retrieval System, Translated Into Any Language, Transmitted In Any Form Or By Any Means, Without The Prior Written Agreement Of LinkPoint International, Inc. LinkPoint International Reserves The Right To Make Changes To This Document And The Products It Describes Without Prior Notice. LinkPoint International Shall Not Be Liable For Inadvertent Technical Errors Or Omissions Made Herein, Nor For Incidental Or Consequential Damages Resulting From The Performance Or Use Of This Product.

Copyright © 1999 By Clearcommerce Corporation. All Rights Reserved. No Part of This Publication May Be Reproduced, Transmitted, Transcribed, Stored in A Retrieval System, Or Translated into Any Language in Any Form or By Any Means Without The Written Permission Of Clearcommerce Corporation.

Virtual LinkPoint Is A Service Mark (SM) Of LinkPoint International. Clearcommerce Is A Trademark Of Clearcommerce Corporation. All Other Products Or Services Mentioned In This Document Are Identified By The Trademarks Or Service Marks Of Their Respective Companies Or Organizations.

Contents

Chapter 1. Introducing Virtual LinkPoint^{sm}

Internet Commerce Offers An Unparalleled Opportunity For Merchants To Extend Existing Sales Channels Or Create New Sales Channels Over The Internet. But While Large Merchants Have The Resources To Create And Maintain Dazzling Web Sites With Complex Ordering Mechanisms, Merchants Wanting To Offer Just A Few Products For Sale Over The Internet Can't Justify The Expense Of Complex Solutions.

Virtual LinkPoint^{sm} Is A Virtual Web-Based Point-Of-Sale Terminal That Lets You Easily And Conveniently Process And Manage Credit Card And Electronic Check Transactions From A Standard Web Browser Via The Internet. The Product Provides Not Only Real-Time Credit Card Transaction Processing Capability And Once-Per-Day Batch Processing Of Electronic Check Transactions, But A System Of Reports And Tools To Track Sales And Otherwise Manage Transactions.

Locally Installed Terminal-Based Hardware Or PC-Based Software That Run Credit Card Transactions To Credit Card Processors Can Be Difficult To Install And Maintain. Software Must Be Frequently Updated On The Merchant's PC, And Configuring Modems To Dial Out With Proper Dial Strings To Credit Card Processors Can Be Challenging, Time Consuming And Frustrating. Electronic Check Authorization Has Only Been Available Through Specialized Processors Dealing Directly With The Automated Clearing House (ACH) And Not Available Online Through Internet Channels.

Choosing A Server-Based System Means That No Transaction Processing Software Resides On The Merchant's PC. The Software Runs On A Secure Server Maintained By LinkPoint, So There Aren't Any Configuration Or Upgrade Issues To Deal With On The Merchant's End. The Merchant Uses A Standard Web Browser (3.0 Or Higher) And An Internet Connection To Use The Software On The LinkPoint Secure Server. The Software On The Secure Server Communicates With The Card Processors Using A Fast Communication Connection, So Transactions Are Processed And The Results Returned To The Merchant Quickly And Efficiently.

There Is No Software To Install On Your Own PC. You Use Virtual LinkPoint By Accessing An Assigned URL Using A Standard Web Browser (3.0 Or Higher) And An Internet Connection.

Virtual LinkPoint Supports These Credit Cards: Mastercard®, Visa®, American Express®, Diners Club®/Carteblanche®, Discover®, And JCB™.

Implementation Road Map

These Are The Essential Steps To Use Virtual LinkPoint As Your Virtual Web-Based Point-Of-Sale Terminal:

1. Start Virtual LinkPoint On Your PC And Perform Initial Login Tasks. See Chapter 2. Logging In To Virtual LinkPoint
2. Use Virtual LinkPoint As Your Virtual Web-Based Point-Of-Sale Terminal to Easily And Conveniently Process And Manage Credit Card And Electronic Check Transactions. See Chapters 3-7 For Additional Information.
3. Manage Your Internet Sales From Merchant Reports And Tools. See Chapter 11. Using Merchant Reports And Tools For Details.

Getting Help

You Can Access The Help System And The Manuals By Clicking The Help Link In The Navigation Section Of Each Screen, Or By Opening The Following Uniform Resource Locator (URL) In Your Web Browser:

Https:/*Secure_host_name*/Vlphelp/welcome.HTML

The *Secure_Host_Name* Is The Machine On Which Virtual LinkPoint Is Running. Your “Welcome” E-Mail Includes The Full Help URL.

Navigating Help

The Main Help Topics May Expand When You Click Them To Display One Or More Subtopics. Some Second-Level Topics Also Expand To Display One Or More Subtopics. When You Need Help To Perform A Task, Expand A Topic, Then Select The Subtopic From The Navigation List.

Virtual LinkPoint Manuals

The Following Manuals Are Available To Virtual LinkPoint Customers:

- *Virtual LinkPoint*
- *Merchant Reports And Tools*
- *New Merchant Orientation*

You Can Use The Adobe® Acrobat® Reader To Read Or Print These Documents. Acrobat Reader Is Available As A Free Download From The Following Web Site:

http://www.adobe.com/prodindex/acrobat/readstep.HTMh

To Read Or Print A Manual, Open The Help System And Click The Name Of The Manual In The Welcome To Virtual LinkPoint Help Screen.

Chapter 2. Logging In To Virtual LinkPoint

When You Decide To Use Virtual LinkPoint As Your Virtual Web-Based Point-Of-Sale Terminal, A Sales Agent Or Sales Representative Will Contact You For The Information Needed In Order To Set Up Your Transaction Processing Account.

Upon Approval Of Your Merchant Account, You Will Receive An E-Mail With Your Initial Log-In URL And Information To Obtain Your Password Which Allows You To Access Virtual LinkPoint, As Well As Your Internet Store Reports And The Virtual LinkPoint Documentation And Help System.

Logging In

Initial Log-In

The First Time *Only* That You Log-In To Access Virtual LinkPoint, Here's The Sequence You'll Need To Follow:

1. Log In Using Your Assigned User Name (Found In Your "Welcome" E-Mail) And Temporary Password (Issued By Your Processor's Merchant Services).

2. Accept The License Agreement.

3. Change Your Temporary Password In The Initial Password Administration Screen. See The "Changing Your Password" Section Below For Details.

4. Once You Have Changed Your Password, Select The Task You Want To Perform From The Navigation Section Of The Screen That Displays. As Described In The "Changing Your Password" Section Below, You Must Log In Again Following Any Password Change.

Regular Log-In

Enter Your User Name And Personal Password; Then Click The **OK** Button. Following Successful Log-In, Select The Task You Want To Perform From The Navigation Section Of The Screen.

The First Screen Displayed After You Log In Allows You To Enter Information And Perform A Sale Transaction.

Forget Your User Name Or Password?

If You Forget Your User Name Or Password Call Your Processor's Merchant Services Department.

Changing Your Password

You *Must* Change Your Password The First Time You Log In To Virtual LinkPoint. In Addition, You May Change Your Password Any Time You Think It Is Necessary. This Is The Procedure:

1. In The Navigation Section Of The Screen, Click **Administration**. The Password Administration Screen Is Displayed.

Note: If This Is Your *First* Log-In To Virtual LinkPoint, The Initial Password Administration Screen Displays Automatically.

2. In The Old (Or Initial) Password Field, Enter Your Current Password.
3. In The New Password Field, Enter The New Password You Have Chosen. As A Security Feature, The Password Will *Not* Appear On The Screen As You Type.

   Note: The New Password Must Contain Between 1 And 20 Characters. Passwords Are Case-Sensitive (I.E., Password), So Remember It Exactly As Typed In.
4. In The Confirm New Password Field, Re-Enter The New Password. As A Security Feature, The Password Will *Not* Appear On The Screen As You Type.
5. When The Information In The Password Administration Screen Is Correct, Click The **Submit** Button At The Bottom Of The Page. If You Want To Delete The Information You Have Entered In All Fields, Click The **Clear** Button.
6. In The Password Confirmation Screen, Click The **Continue** Button.

After You Change Your Password, You Must Log In With Your User Name And New Password Before Virtual LinkPoint Will Allow You To Perform Any Other Tasks. This Is The Procedure:

1. Select A Task From The Navigation Section.
2. An “Authentication Failed. Retry?” Message Will Be Displayed. Click The **OK** Button.
3. Log In With Your User Name And New Password.

You Will Be Able To Perform All Tasks Linked From The Navigation Section.

Chapter 3. Getting Around Virtual LinkPoint

Virtual LinkPoint Screen

This Is The Virtual LinkPoint Screen For A Credit Card Sale Transaction, Shown Here As An Example Of A Typical Virtual LinkPoint Screen. (The Functionality Of The Sale Screen Is Discussed Later.)

Figure 1. Sale Transaction Screen

Once You Have Successfully Logged In To Virtual LinkPoint, The Screens Displayed Contain Two Sections. The Left Section Of Each Screen Is For Navigation (Moving From Screen To Screen To Perform Different Tasks), While The Right Section Is For Content (Specific Information Related To The Active Topic Selected In The Navigation Section).

There Are Four Main Topics In The Navigation Section:

- Transaction Type
- Reports
- Administration
- Help

Topics May Contain Subtopics. To See The Subtopics Within A Main Topic, Click The Main Topic Once To Expand It. A List Of Subtopics Is Displayed, And The First Subtopic In The List Is Automatically Selected As The Active Subtopic. The Transaction Type Topic Expands To Display A Number Of Subtopics. The Administration Topic Currently Contains A Single Subtopic.

Main Topics May Also Launch New Browser Windows. The Reports And Help Topics Launch New Browser Windows When You Click On Them.

Note: When You Log In To Virtual LinkPoint, The Screen Displays The Transaction Type Main Topic Already Expanded To Show Its List Of Subtopics; The Sale Subtopic Is The Active Subtopic.

Screen Buttons

Many Forms Include These Buttons At The Bottom:

- The **Submit** Button Performs The Action Related To The Information Entered Into The Form. For Example, If You Want To Process A Sale Transaction, Enter Information In Required Fields In The Sale Form, Enter Information In The Optional Fields If You Wish, Then Click The **Submit** Button.
- The **Clear** Button Deletes All The Information Entered Into The Fields In The Form, And Continues To Display The Form. The **Clear** Function Is Not Reversible; You Must Re-Enter Information From The Beginning.

Chapter 4. Sale Transactions

Use A Sale Transaction To Authorize A Credit Card Sale. The Sale Transaction Does *Not* Apply To A Purchase By Electronic Check.

Figure 2. Virtual LinkPoint Sale Form

Enter The Following Information In The Credit Card Sale Form:

Field Name	Required/ Optional	Field Restrictions	Description
Order Number	Optional	Maximum Of 30 Characters, Alphanumeric Only	Enter A Unique Number For This Order. If You Do Not Enter An Order Number, A Unique Number Will Be Generated Based On IP Address And Current Date. If You Enter A Previously Assigned Order Number, You Will Be Prompted To Enter A New, Unique Number.
Amount	Required	Real Number, 1.00 To 30000.00	Amount Of The Transaction **Note**: Accepts Any Number Of Preceding Spaces And Zeros ("+" Sign Is Also Acceptable). If More Than Two Digits Follow The Decimal, It Will Round By The Rule.
Credit Card Number	Required	Maximum Of 20 Characters; 13-16 Digits, Plus Spaces And Dashes	Credit Card Number
Expiration Date	Required	Choose From Pull-Down Menus	Month And Year Credit Card Expires **Note**: Month Is One Of 1–12; Year Is One Of Current Year To Current Year +5.
Customer Name	Required	Maximum Of 30 Characters; May *Not* Contain Only Spaces	Customer's Name
Customer Address	Required	Two Lines Available; Maximum Of 30 Characters Each Line	Customer's Street Address **Note**: Use One Or Both Customer Address Lines.
City	Required	Maximum Of 30 Characters	Customer's City
State	Required	Choose From Pull-Down Menu	Customer's State Or U.S. Territory **Note**: List Includes 50 States And Three Territories.

Field Name	Required/ Optional	Field Restrictions	Description
Zip	Required	Five-Digit ZIP	Customer's ZIP Code
Phone Number	Optional	Maximum Of 20 Characters	Customer's Phone Number
Fax Number	Optional	Maximum Of 20 Characters	Customer's Fax Number
E-Mail Address	Optional	Maximum Of 45 Characters; No Spaces	Customer's E-Mail Address. This Is Not A Required Field, But If You Enter An E-Mail Address, It Must Be In Standard Format (E.G., Customer@Isp.Com). If An E-Mail Address Is Not Provided, The Customer Cannot Receive An E-Mail Receipt.
Comments	Optional	Maximum Of 256 Characters	Any Other Remarks, Information About The Transaction

When The Information In The Form Is Correct, Click The **Submit** Button At The Bottom Of The Page. If You Want To Delete The Information You Have Entered In All Fields, Click The **Clear** Button.

A Confirmation Of Entry Displays Containing Information Similar To This:

Credit Card Sale Transaction
Confirmation Of Entry

Transaction Status: **APPROVED**
Time: **Fri Aug 28 15:38:47 1998**
Merchant: **000001**
Approval Code: **Y:26TEST1eba000002:YNA**
Order Number: **246**
Amount: **15.29**

Credit Card Number: **1234...5678**
Expiration Date: **05/1999**

Customer Name: **John Smith**
Street Address: **1234 Main St.**

City, State, ZIP: **Austin, TX 12345**
Phone Number: **512-555-1212**
Fax Number: **512-555-1111**
E-Mail Address: **jsmith@Isp.com**

Comments: **Frequent Customer**

The Transaction Status Is Either APPROVED Or DECLINED. Time Is The Date And Time The Transaction Finished Processing. If The Transaction Was Approved, The Approval Code Is: Y:Approval Number:AVS Code (AVS Codes Are Described In The *Merchant*

Reports And Tools Publication And Help System). If Declined, The Approval Code Displays: N: Reason For Decline. All Other Data Displayed Reflects Information Entered On The Point-Of-Sale Form.

Note: To Enhance Security, The Credit Card Number Displayed In The Confirmation Of Entry Is Truncated To The First Four And Last Four Digits Only.

We Recommend That You Print The Confirmation Of Entry As A Record Of The Transaction.

Chapter 5. Return Transactions

Use A Return Transaction To Return Funds To The Customer's Credit Card. The Initial Return Form Prompts For A Sale Or Ticket Only Transaction Order Number For The Transaction That Is To Be Credited.

Online Returns Are *Not* Possible For Electronic Check Transactions. If A Customer Elects To Return Goods Paid For By Electronic Check, The Procedure Must Be Handled By The Merchant Outside The Virtual LinkPoint System.

Once You Have Entered A Valid Order Number, The Following Form Is Displayed:

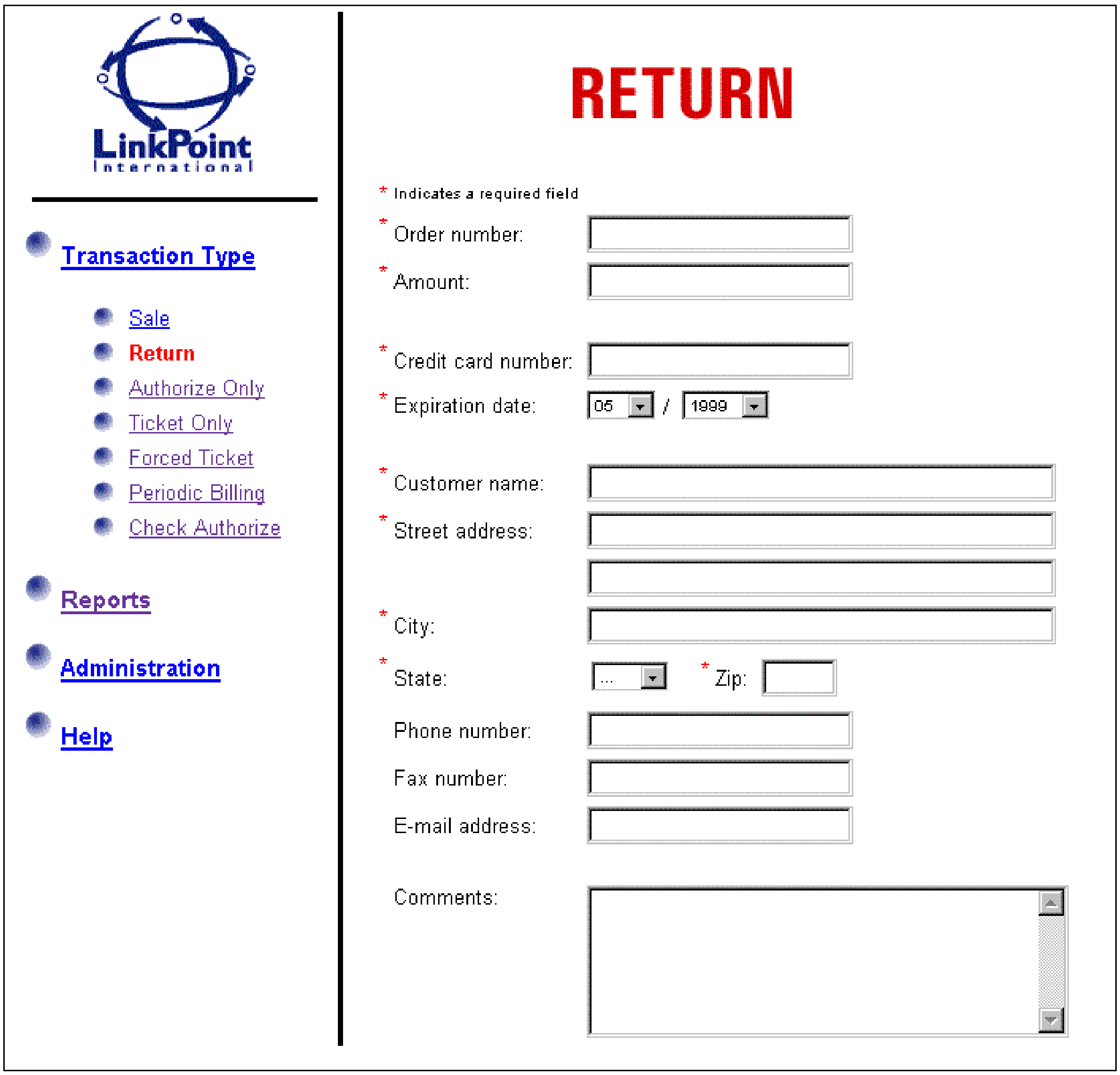

Figure 3. Virtual LinkPoint Return Form

Virtual LinkPoint Displays Values For Each Of The Fields Described Below From Information About The Order Previously Stored In The Database. You May Edit The Displayed Values If Necessary.

Field Name	Required/ Optional	Field Restrictions	Description
Order Number	Required	Maximum Of 30 Characters, Alphanumberic Only	This Is The Unique Number Associated With The Order For Which A Return Is Now Being Generated.
Amount	Required	Real Number, 1.00 To 30000.00	Amount Of The Transaction **Note**: Accepts Any Number Of Preceding Spaces And Zeros ("+" Sign Is Also Acceptable). If More Than Two Digits Follow The Decimal, It Will Round By The Rule.
Credit Card Number	Required	Maximum Of 20 Characters; 13-16 Digits, Plus Spaces And Dashes	Credit Card Number
Expiration Date	Required	Choose From Pull-Down Menus	Month And Year Credit Card Expires **Note**: Month Is One Of 1–12; Year Is One Of Current Year To Current Year +5.
Customer Name	Required	Maximum Of 30 Characters; May *Not* Contain Only Spaces	Customer's Name
Customer Address	Required	Two Lines Available; Maximum Of 30 Characters Each Line	Customer's Street Address **Note**: Use One Or Both Customer Address Lines.
City	Required	Maximum Of 30 Characters	Customer's City
State	Required	Choose From Pull-Down Menu	Customer's State Or U.S. Territory **Note**: List Includes 50 States And Three Territories.
Zip	Required	Five-Digit Zip	Customer's ZIP Code

Field Name	Required/ Optional	Field Restrictions	Description
Phone Number	Optional	Maximum Of 20 Characters	Customer's Phone Number
Fax Number	Optional	Maximum Of 20 Characters	Customer's Fax Number
E-Mail Address	Optional	Maximum Of 45 Characters; No Spaces	Customer's E-Mail Address. This Is Not A Required Field, But If You Enter An E-Mail Address, It Must Be In Standard Format (E.G., Customer@Isp.Com). If An E-Mail Address Is Not Provided, The Customer Cannot Receive An E-Mail Receipt.
Comments	Optional	Maximum Of 256 Characters	Any Other Remarks, Information About The Transaction

When The Information In The Form Is Correct, Click The **Submit** Button At The Bottom Of The Page. If You Want To Delete The Information You Have Entered In All Fields, Click The **Clear** Button.

A Confirmation Of Entry Displays Containing Information Similar To This:

Return Of A Credit Card Purchase Transaction
Confirmation Of Entry

Transaction Status: **APPROVED**
Time: **Fri Aug 28 15:38:47 1998**
Merchant: **000001**
Approval Code: **Y:Accepted**
Order Number: **246**
Amount: **15.29**

Credit Card Number: **1234...5678**
Expiration Date: **05/1999**

Customer Name: **John Smith**
Street Address: **1234 Main St.**

City, State, ZIP: **Austin, TX 12345**
Phone Number: **512-555-1212**
Fax Number: **512-555-1111**
E-Mail Address: **jsmith@Isp.com**

Comments: **Frequent Customer**

The Transaction Status Is Either APPROVED Or DECLINED. Time Is The Date And Time The Transaction Finished Processing. If The Transaction Was Approved, The Approval Code Is: Y: Accepted

Note: To Enhance Security, The Credit Card Number Displayed In The Confirmation Of Entry Is Truncated To The First Four And Last Four Digits Only.

We Recommend That You Print The Confirmation Of Entry As A Record Of The Transaction.

Chapter 6. Authorize Only Transactions

Use An Authorize Only Transaction To Authorize And Check Availability Of Funds On A Customer's Credit Card.

An Authorize Only Transaction Must Be "Completed" By An Associated Ticket Only Transaction Before The Customer's Credit Card Is Actually Charged. The Associated Ticket Only Transaction Can Be Created Using The Ticket Only Transaction Form Or By Using Merchant Reports And Tools To Confirm Shipment Of Goods.

The Authorize Only Transaction Does *Not* Apply To A Purchase By Electronic Check.

Figure 4. Virtual LinkPoint Authorize Only Form

Enter The Following Information In The Authorize Only Form:

Field Name	Required/ Optional	Field Restrictions	Description
Order Number	Optional	Maximum Of 30 Characters	Enter A Unique Number For This Order. If You Do Not Enter An Order Number, A Unique Number Will Be Generated Based On IP Address And Current Date. If You Enter A Previously Assigned Order Number, You Will Be Prompted To Enter A New, Unique Number.
Amount	Required	Real Number, 1.00 To 30000.00	Amount Of The Transaction **Note**: Accepts Any Number Of Preceding Spaces And Zeros ("+" Sign Is Also Acceptable). If More Than Two Digits Follow The Decimal, It Will Round By The Rule.
Credit Card Number	Required	Maximum Of 20 Characters; 13–16 Digits, Plus Spaces And Dashes	Credit Card Number
Expiration Date	Required	Choose From Pull-Down Menus	Month And Year Credit Card Expires **Note**: Month Is One Of 1–12; Year Is One Of Current Year To Current Year +5.
Customer Name	Required	Maximum Of 30 Characters; May *Not* Contain Only Spaces	Customer's Name
Customer Address	Required	Two Lines Available; Maximum Of 30 Characters Each Line	Customer's Street Address **Note**: Use One Or Both Customer Address Lines.
City	Required	Maximum Of 30 Characters	Customer's City
State	Required	Choose From Pull-Down Menu	Customer's State Or U.S. Territory **Note**: List Includes 50 States And Three Territories.

Field Name	Required/ Optional	Field Restrictions	Description
Zip	Required	Five-Digit ZIP	Customer's ZIP Code
Phone Number	Optional	Maximum Of 20 Characters	Customer's Phone Number
Fax Number	Optional	Maximum Of 20 Characters	Customer's Fax Number
E-Mail Address	Optional	Maximum Of 45 Characters; No Spaces	Customer's E-Mail Address. This Is Not A Required Field, But If You Enter An E-Mail Address, It Must Be In Standard Format (E.G., Customer@Isp.Com). If An E-Mail Address Is Not Provided, The Customer Cannot Receive An E-Mail Receipt.
Comments	Optional	Maximum Of 256 Characters	Any Other Remarks Or Information About The Transaction

When The Information In The Form Is Correct, Click The **Submit** Button At The Bottom Of The Page. If You Want To Delete The Information You Have Entered In All Fields, Click The **Clear** Button.

A Confirmation Of Entry Will Be Displayed Containing Information Similar To This:

Authorize Only
Confirmation Of Entry

Transaction Status: **APPROVED**
Time: **Fri Aug 28 15:38:47 1998**
Merchant: **000001**
Approval Code: **Y:16TEST1eba00000e:YNA**
Order Number: **246**
Amount: **15.29**

Credit Card Number: **1234...5678**
Expiration Date: **05/1999**

Customer Name: **John Smith**
Street Address: **1234 Main St.**

City, State, ZIP: **Austin, TX 12345**
Phone Number: **512-555-1212**
Fax Number: **512-555-1111**
E-Mail Address: **jsmith@Isp.com**

Comments: **Frequent Customer**

The Transaction Status Is Either APPROVED Or DECLINED. Time Is The Date And Time The Transaction Finished Processing. If The Transaction Was Approved, The Approval

Code Is: Y: Approval Number: AVS Code (AVS Codes Are Described In The *Merchant Reports And Tools* Publications And Help System). If Declined, The Approval Code Displays: N: Reason For Decline. The Ref. Number Is The 7th–16th Characters Of The Approval Code. All Other Data Displayed Reflects Information Entered On The Point-Of-Sale Screen.

> **Note**: To Enhance Security, The Credit Card Number Displayed In The Confirmation Of Entry Is Truncated To The First Four And Last Four Digits Only.

We Recommend That You Print The Confirmation Of Entry As A Record Of The Transaction.

Chapter 7. Ticket Only Transactions

Use A Ticket Only Transaction To Complete An Authorize Only Transaction. The Initial Ticket Only Form Prompts For The Order Number For The Authorize Only Transaction That Is To Be Completed. Ticket Only Transactions Do *Not* Apply To Purchases Paid By Electronic Check.

> **Note**: If You Obtained A Voice Authorization Over The Phone, You Must Perform A Forced Ticket Transaction, Not A Ticket Only Transaction

Once You Have Entered A Valid Authorize Only Order Number, The Following Form Is Displayed:

Figure 5. Virtual LinkPoint Ticket Only Form

Virtual LinkPoint Displays Values For Each Of The Fields Described Below From Information About The Order Previously Stored In The Database. Values That May Be Edited Are Displayed With Text Entry Boxes; Other Values May Not Be Edited.

Field Name	Required/ Optional	Field Restrictions	Description
Order Number (Not Editable)	Required	Maximum Of 30 Characters; Alphanumeric Only	This Is The Unique Number Associated With The Authorize Only Transaction That Is Now Being Completed.
Amount	Required	Real Number, 1.00 To 30000.00	Amount Of The Transaction **Note**: Accepts Any Number Of Preceding Spaces And Zeros ("+" Sign Is Also Acceptable). If More Than Two Digits Follow The Decimal, It Will Round By The Rule.
Credit Card Number (Not Editable)	Required	Maximum Of 20 Characters; 13–16 Digits, Plus Spaces And Dashes	Credit Card Number
Expiration Date (Not Editable)	Required	Choose From Pull-Down Menus	Month And Year Credit Card Expires **Note**: Month Is One Of 1–12; Year Is One Of Current Year To Current Year +5.
Ref. Number (Not Editable)	Required	Maximum Of 6 Characters; Alphanumeric Only	Enter The Reference Number For The Authorize Only Transaction That Corresponds To This Ticket Only Transaction. The Reference Number Is The 7th-16th Characters Following The Initial "Y:" Of The Approval Code For The Authorize Only Transaction.
Customer Name (Not Editable)	Required	Maximum Of 30 Characters; May *Not* Contain Only Spaces	Customer's Name
Customer Address (Not Editable)	Required	Two Lines Available; Maximum Of 30 Characters Each Line	Customer's Street Address **Note**: Use One Or Both Customer Address Lines.
City (Not Editable)	Required	Maximum Of 30 Characters	Customer's City

State (Not Editable)	Required	Choose From Pull-Down Menu Of 51	Customer's State
Zip (Not Editable)	Required	Five-Digit ZIP	Customer's ZIP Code
Phone Number	Optional	Maximum Of 20 Characters	Customer's Phone Number
Fax Number	Optional	Maximum Of 20 Characters	Customer's Fax Number
E-Mail Address	Optional	Maximum Of 45 Characters; No Spaces	Customer's E-Mail Address. This Is Not A Required Field, But If You Enter An E-Mail Address, It Must Be In Standard Format (E.G., Customer@Isp.Com). If An E-Mail Address Is Not Provided, The Customer Cannot Receive An E-Mail Receipt.
Comments	Optional	Maximum Of 256 Characters	Any Other Remarks Or Information About The Transaction

When The Information In The Form Is Correct, Click The **Submit** Button At The Bottom Of The Page. If You Want To Delete The Information You Have Entered In All Fields, Click The **Clear** Button.

A Confirmation Of Entry Will Be Displayed Containing Information Similar To This:

Ticket Only
Confirmation Of Entry

Transaction Status: **APPROVED**
Time: **Fri Aug 28 15:38:47 1998**
Merchant: **000001**
Approval Code: **Y: Accepted**
Order Number: **246**
Amount: **15.29**

Credit Card Number: **1234...5678**
Expiration Date: **05/1999**

Customer Name: **John Smith**
Street Address: **1234 Main St.**

City, State, ZIP: **Austin, TX 12345**
Phone Number: **512-555-1212**
Fax Number: **512-555-1111**
E-Mail Address: **jsmith@Isp.com**

Comments: **Frequent Customer**

The Transaction Status Is Either APPROVED Or DECLINED. Time Is The Date And Time The Transaction Finished Processing. If The Transaction Was Approved, The Approval Code Is: Y: Accepted. All Other Data Displayed Reflects Information Entered In The Point-Of-Sale Screen.

> **Note**: To Enhance Security, The Credit Card Number Displayed In The Confirmation Of Entry Screen Is Truncated To The First Four And Last Four Digits Only.

We Recommend That You Print The Confirmation Of Entry As A Record Of The Transaction.

Chapter 8. Forced Ticket Transactions

Use A Forced Ticket Transaction To Complete A Voice (Phone) Authorization. Forced Ticket Transactions Do *Not* Apply To Purchases Paid For By Electronic Check.

> **Note**: If You Performed An Authorize Only Transaction Online, You Must Complete It With A Ticket Only Transaction, Not A Forced Ticket Transaction

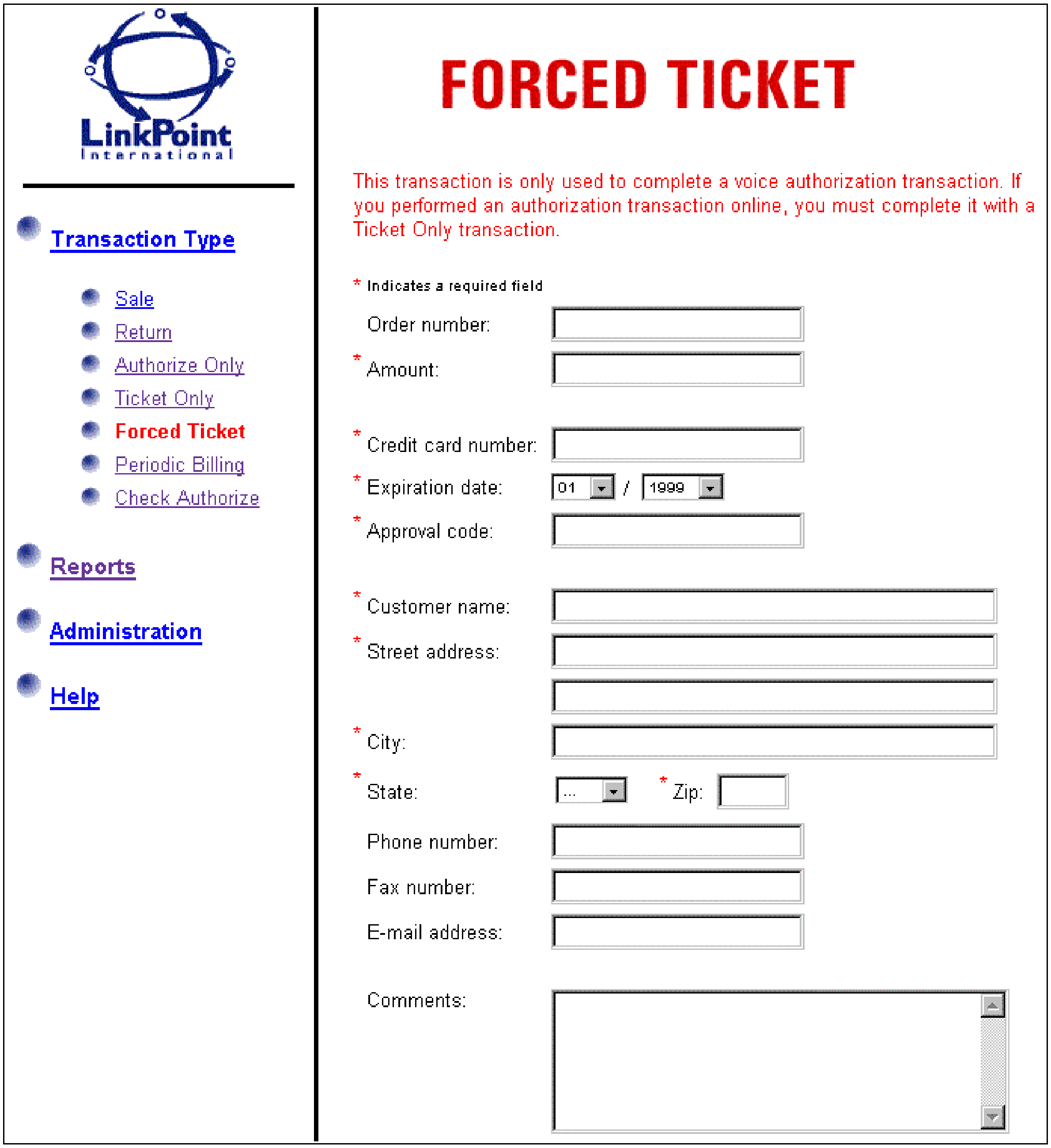

Figure 6. Virtual LinkPoint Forced Ticket Form

Enter The Following Information In The Forced Ticket Form:

Field Name	Required/ Optional	Field Restrictions	Description
Order Number	Optional	Maximum Of 30 Characters, Alphanumeric Only	Enter A Unique Number For This Order. If You Do Not Enter An Order Number, A Unique Number Will Be Generated Based On IP Address And Current Date. If You Enter A Previously Assigned Order Number, You Will Be Prompted To Enter A New, Unique Number.
Amount	Required	Real Number, 1.00 To 30000.00	Amount Of The Transaction **Note**: Accepts Any Number Of Preceding Spaces And Zeros ("+" Sign Is Also Acceptable). If More Than Two Digits Follow The Decimal, It Will Round By The Rule.
Credit Card Number	Required	Maximum Of 20 Characters; 13-16 Digits, Plus Spaces And Dashes	Credit Card Number
Expiration Date	Required	Choose From Pull-Down Menus	Month And Year Credit Card Expires **Note**: Month Is One Of 1–12; Year Is One Of Current Year To Current Year +5.
Approval Code	Required	6 Characters	Voice Authorization Approval Code
Customer Name	Required	Maximum Of 30 Characters; May *Not* Contain Only Spaces	Customer's Name
Customer Address	Required	Two Lines Available; Maximum Of 30 Characters Each Line	Customer's Street Address **Note**: Use One Or Both Customer Address Lines.
City	Required	Maximum Of 30 Characters	Customer's City
State	Required	Choose From Pull-Down Menu	Customer's State Or U.S. Territory **Note**: List Includes 50 States And

Field Name	Required/ Optional	Field Restrictions	Description
			Three Territories.
Zip	Required	Five-Digit ZIP	Customer's ZIP Code
Phone Number	Optional	Maximum Of 20 Characters	Customer's Phone Number
Fax Number	Optional	Maximum Of 20 Characters	Customer's Fax Number
E-Mail Address	Optional	Maximum Of 45 Characters; No Spaces	Customer's E-Mail Address. This Is Not A Required Field, But If You Enter An E-Mail Address, It Must Be In Standard Format (E.G., Customer@Isp.Com). If An E-Mail Address Is Not Provided, The Customer Cannot Receive An E-Mail Receipt.
Comments	Optional	Maximum Of 256 Characters	Any Other Remarks, Information About The Transaction

When The Information In The Form Is Correct, Click The **Submit** Button At The Bottom Of The Page. If You Want To Delete The Information You Have Entered In All Fields, Click The **Clear** Button.

A Confirmation Of Entry Will Be Displayed Containing Information Similar To This:

Forced Ticket Transaction
Confirmation Of Entry

Transaction Status: **APPROVED**
Time: **Fri Aug 28 15:38:47 1998**
Merchant: **000001**
Approval Code: **Y:Accepted**
Order Number: **246**
Amount: **15.29**

Credit Card Number: **1234...5678**
Expiration Date: **05/1999**

Customer Name: **John Smith**
Street Address: **1234 Main St.**

City, State, ZIP: **Austin, TX 12345**
Phone Number: **512-555-1212**
Fax Number: **512-555-1111**
E-Mail Address: **jsmith@Isp.com**

Comments: **Frequent Customer**

The Transaction Status Is Either APPROVED Or DECLINED. Time Is The Date And Time The Transaction Finished Processing. If The Transaction Was Approved, The Approval Code Is: Y:Accepted. All Other Data Displayed Reflects Information Entered In The Point-Of-Sale Form.

> **Note:** To Enhance Security, The Credit Card Number Displayed In The Confirmation Of Entry Is Truncated To The First Four And Last Four Digits Only.

We Recommend That You Print The Confirmation Of Entry As A Record Of The Transaction.

Forced Ticket Transactions Are Recorded In The Database And Displayed Through Merchant Reports And Tools As Authorization/Ticket Pairs. For Each Forced Ticket Transaction You Enter, You Will See An Authorization And A Ticket Only Transaction; You Will Not See In The Transactions Processed Report A Transactions Labeled Forced Ticket.

Chapter 9. Periodic Billing Transactions

Use Periodic Billing To Set Up A Recurring Credit Card Charge (For Example, A Monthly Subscription). The Customer's Credit Card Is Automatically Billed According To Specifications You Set. Periodic Billing Is *Not* Available For Payment By Electronic Check.

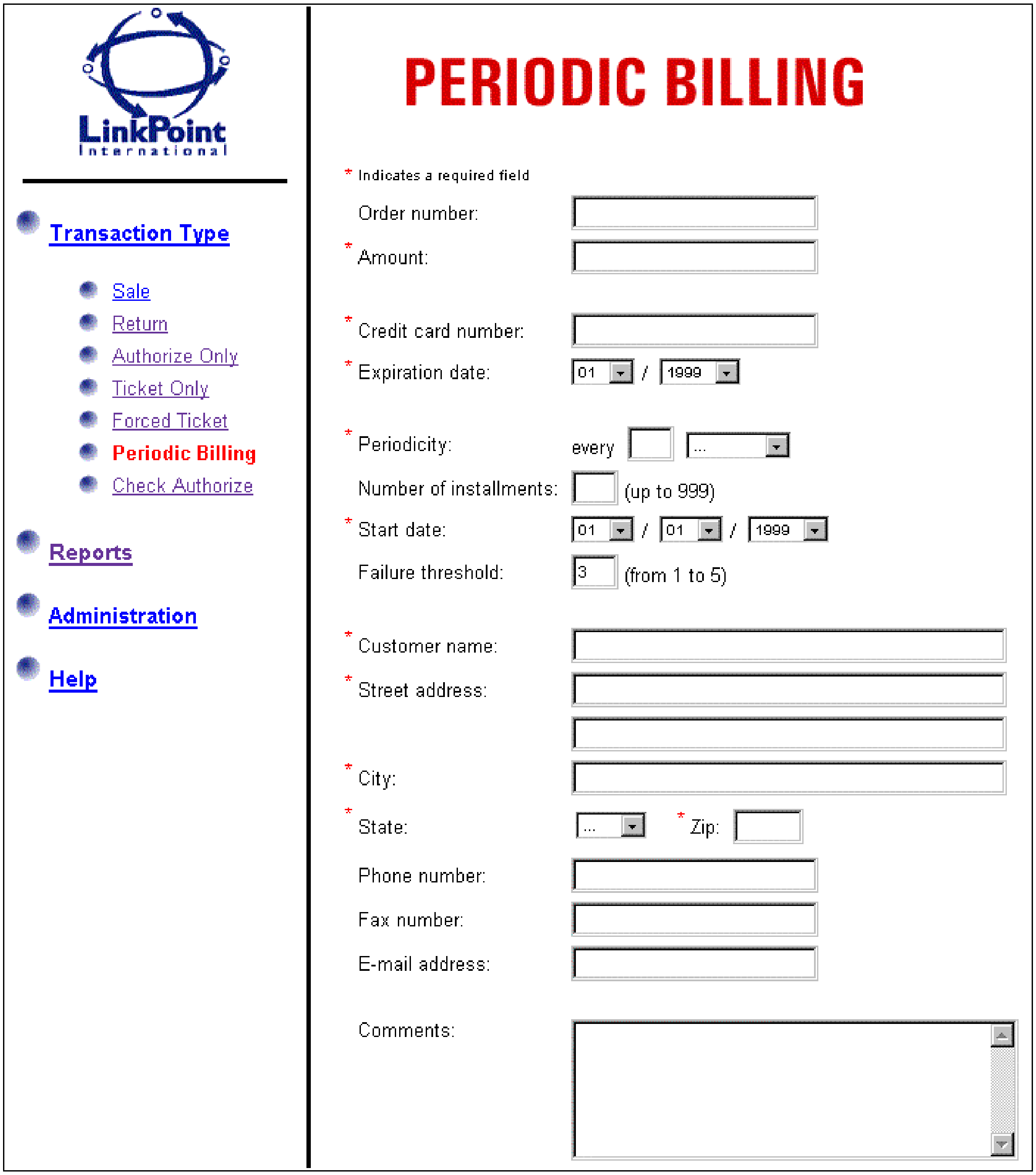

Figure 7. Virtual LinkPoint Periodic Billing Form

To Set Up Periodic Billing, Enter The Following Information In The Periodic Billing Form:

Field Name	Required/ Optional	Field Restrictions	Description
Order Number	Optional	Maximum Of 30 Characters	Enter A Unique Number For This Order. If You Do Not Enter An Order Number, A Unique Number Will Be Generated Based On IP Address And Current Date. If You Enter A Previously Assigned Order Number, You Will Be Prompted To Enter A New, Unique Number.
Amount	Required	Real Number, 1.00 To 30000.00	Amount Of The Transaction **Note**: Accepts Any Number Of Preceding Spaces And Zeros ("+" Sign Is Also Acceptable). If More Than Two Digits Follow The Decimal, It Will Round By The Rule.
Credit Card Number	Required	Maximum Of 20 Characters; 13-16 Digits, Plus Spaces And Dashes	Credit Card Number
Expiration Date	Required	Choose From Pull-Down Menus	Month And Year Credit Card Expires **Note**: Month Is One Of 1–12; Year Is One Of Current Year To Current Year +5.
Periodicity	Required	Maximum 999	Frequency With Which The Bill Should Be Charged To The Credit Card.
Number Of Installments	Optional	Maximum 999	Total Number Of Times The Bill Should Be Charged To The Credit Card.
Start Date	Required	Choose From Pull-Down Menus	Month/Day/Year When Bill Should First Be Charged To The Credit Card. **Note:** Start Date Must Fall After Current Date, But Before Credit Card Expiration Date.
Failure Threshold	Optional	One To Five Times	Number Of Sequential Failures Before An E-Mail Is Sent To The

Field Name	Required/ Optional	Field Restrictions	Description
			Merchant. **Note**: Default Is Three Failures.
Customer Name	Required	Maximum Of 30 Characters; May *Not* Contain Only Spaces	Customer's Name
Street Address	Required	Two Lines Available; Maximum Of 30 Characters Each Line	Customer's Street Address **Note**: Use One Or Both Customer Address Lines.
City	Required	Maximum Of 30 Characters	Customer's City
State	Required	Choose From Pull-Down Menu	Customer's State Or U.S. Territory **Note**: List Includes 50 States And Three Territories.
Zip	Required	Five-Digit ZIP	Customer's ZIP Code
Phone Number	Optional	Maximum Of 20 Characters	Customer's Phone Number
Fax Number	Optional	Maximum Of 20 Characters	Customer's Fax Number
E-Mail Address	Optional	Maximum Of 45 Characters; No Spaces	Customer's E-Mail Address. This Is Not A Required Field, But If You Enter An E-Mail Address, It Must Be In Standard Format (E.G., Customer@Isp.Com). If An E-Mail Address Is Not Provided, The Customer Cannot Receive An E-Mail Receipt.
Comments	Optional	Maximum Of 256 Characters	Any Other Remarks, Information About The Transaction

When The Information In The Form Is Correct, Click The **Submit** Button At The Bottom Of The Page. If You Want To Delete The Information You Have Entered In All Fields, Click The **Clear** Button.

A Confirmation Of Entry Will Be Displayed Containing Information Similar To This:

Periodic Billing
Confirmation Of Entry

Time: **Fri Aug 28 15:38:47 1998**
Merchant: **000001**
Order Number: **12345**
Amount: **15.29**

Credit Card Number: **1234...5678**
Expiration Date: **05/1999**

Periodicity: **M1**
Number Of Installments: **12**
Start Date: **01/01/1999**
Failure Threshold: **3**

Customer Name: **John Smith**
Street Address: **1234 Main St.**

City, State, ZIP: **Austin, TX 12345**
Phone Number: **512-555-1212**
Fax Number: **512-555-1111**
E-Mail Address: **jsmith@Isp.com**

Comments: **Frequent Customer**

We Recommend That You Print The Confirmation Of Entry As A Record Of The Transaction.

To View Currently Active Periodic Bills Or To Cancel A Periodically Occurring Bill, Use The View Active Periodic Bills Section Of Merchant Reports And Tools. Please See The *Merchant Reports And Tools* Publication Or Help For Details.

Chapter 10. Check Authorization Transactions

Use A Check Authorization Transaction To Authorize An Electronic Check Sale.

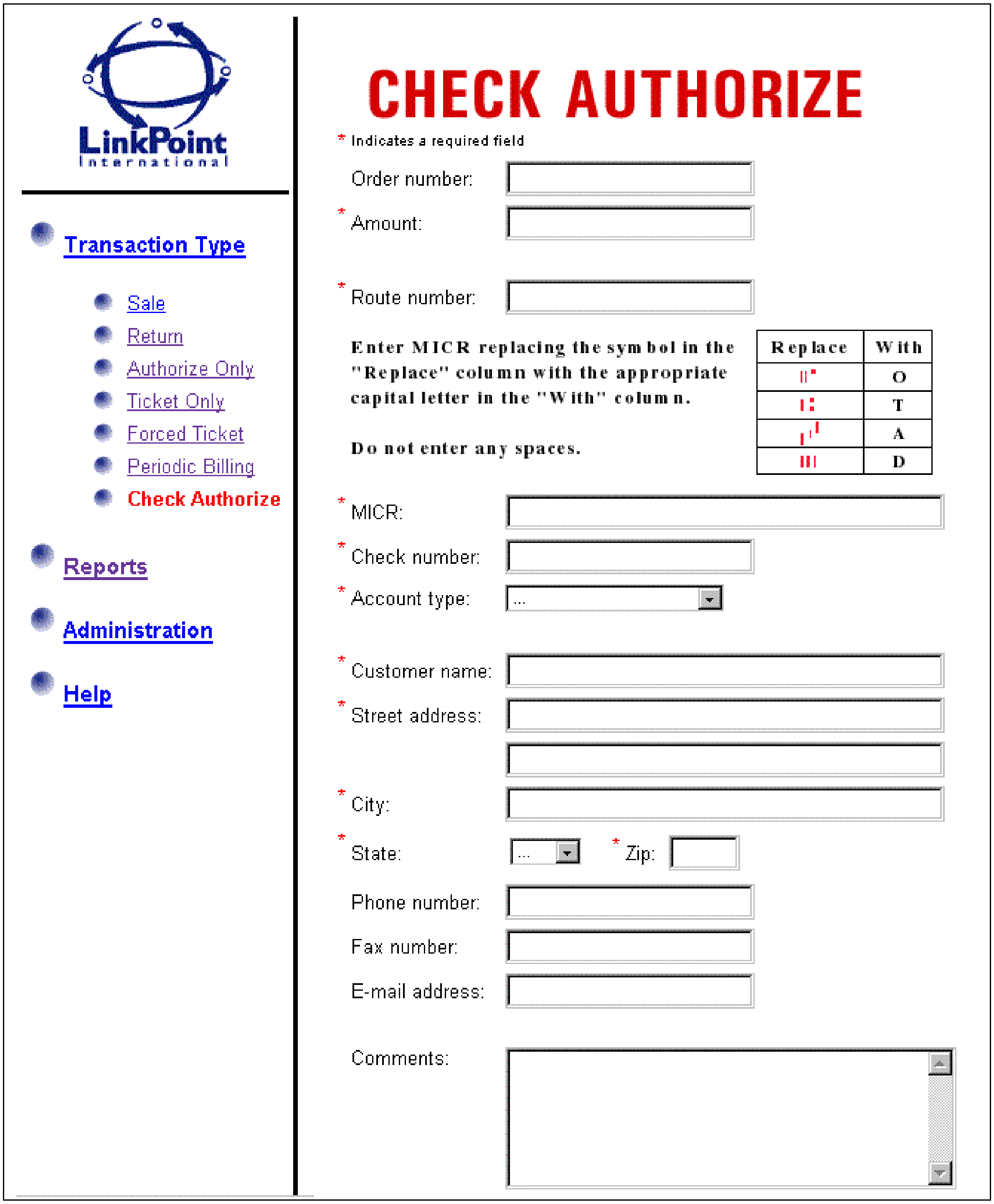

Figure 8. Virtual LinkPoint Check Authorize Form

Enter The Following Information In The Electronic Check Sale Form:

Field Name	Required/ Optional	Field Restrictions	Description
Order Number	Optional	Maximum Of 30 Characters, Alphanumeric Only	Enter A Unique Number For This Order. If You Do Not Enter An Order Number, A Unique Number Will Be Generated Based On IP Address And Current Date. If You Enter A Previously Assigned Order Number, You Will Be Prompted To Enter A New, Unique Number.
Amount	Required	Real Number, 1.00 To 5000.00	Amount Of The Transaction **Note**: Accepts Any Number Of Preceding Spaces And Zeros ("+" Sign Is Also Acceptable). If More Than Two Digits Follow The Decimal, It Will Round By The Rule.
Route Number	Required	9 Digit Number	Bank Transit Routing Number
Magnetic Ink Character Recognition (MICR)	Required	Includes The Account Number, Route Number, And Check Number As Displayed On The Referenced Paper Check. Letters Replace Special Symbols, Per The Chart On The Screen.	
Check Number	Required	No More Than 7 Digits	Sequential Check Number From Customer's Checkbook
Account Type	Required	Select From Pull Down Menu: Personal Or Business Checking Or Savings	Type Of Checking Account
Customer Name	Required	Maximum Of 30 Characters; May *Not* Contain Only Spaces	Customer's Name
Customer Address	Required	Two Lines Available; Maximum Of 30 Characters Each Line	Customer's Street Address **Note**: Use One Or Both Customer Address Lines.
City	Required	Maximum Of 30	Customer's City

Field Name	Required/ Optional	Field Restrictions	Description
		Characters	
State	Required	Choose From Pull-Down Menu	Customer's State Or U.S. Territory **Note**: List Includes 50 States And Three Territories.
Zip	Required	Five-Digit ZIP	Customer's ZIP Code
Phone Number	Optional	Maximum Of 20 Characters	Customer's Phone Number
Fax Number	Optional	Maximum Of 20 Characters	Customer's Fax Number
E-Mail Address	Optional	Maximum Of 45 Characters; No Spaces	Customer's E-Mail Address. This Is Not A Required Field, But If You Enter An E-Mail Address, It Must Be In Standard Format (E.G., Customer@Isp.Com).
Comments	Optional	Maximum Of 256 Characters	Any Other Remarks, Information About The Transaction

To Help You Understand The Construction Of The MICR, Reference The Check Graphic Shown Below And At The Top Of The Check Authorize Form:

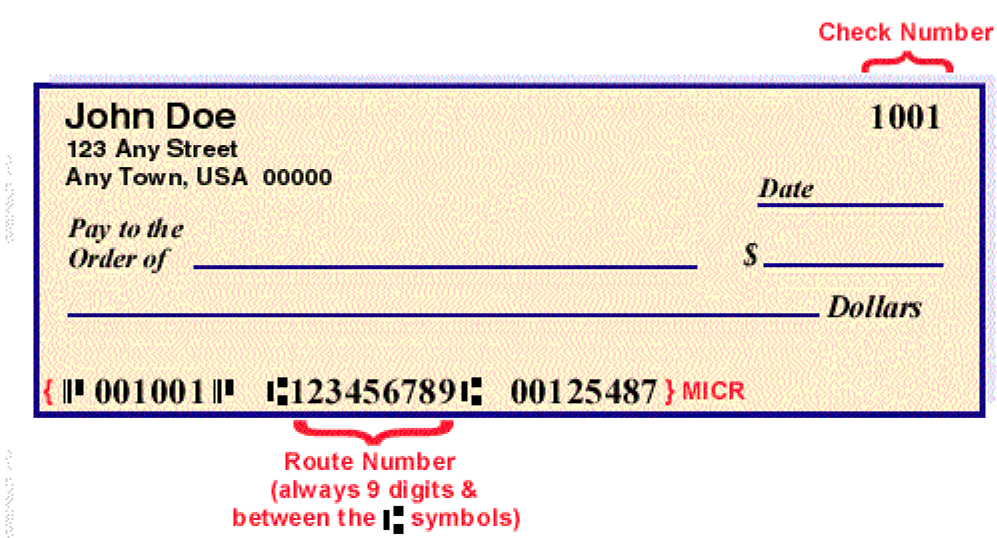

Figure 9. Check Example

It Is Important That Customers Buying Goods Realize That The Electronic Check Is The Online Version Of An Actual Paper Check From The Customer's Own Checkbook. The

Check Number Should Match The Next Sequential Check In The Customer's Checkbook, The Actual Check Should Be Voided, And The Amount Of Purchase Should Be Recorded In The Check Register As If An Actual Check Was Written.

When The Information In The Form Is Correct, Click The **Submit** Button At The Bottom Of The Page. If You Want To Delete The Information You Have Entered In All Fields, Click The **Clear** Button.

A Confirmation Of Entry Will Be Displayed Containing Information Similar To This:

Electronic Check Sale Transaction
Confirmation Of Entry

Time: **Fri Aug 28 15:38:47 1998**
Merchant: **000001**
Order Number: **246**
Amount: **15.29**

Route Number: **076401251**
MICR: **T076401251T000123D456O0201**

Check Number: **0000201**

Account Type: **Pc**

Customer Name: **John Smi0th**
Street Address: **1234 Main St.**

City, State, ZIP: **Austin, TX 12345**
Phone Number: **512-555-1212**
Fax Number: **512-555-1111**
E-Mail Address: **jsmith@Isp.com**

Comments: **Frequent Customer**

Time Is The Date And Time The Transaction Was Entered Into The System. All Other Data Displayed Reflects Information Entered In The Point-Of-Sale Form.

We Recommend That You Print The Confirmation Of Entry As A Record Of The Transaction.

It Is Important To Know When It Is Safe To Ship Product To A Customer Who Pays By Electronic Check. See “Checking The Status Of Credit Card And Electronic Check Transactions” On Page 35 For A Discussion Of The Progression Of A Check Authorization.

Chapter 11. Using Merchant Reports And Tools

Merchant Reports And Tools Is The Main Tool Available To Enable You To Track The Status Of Credit Card And Electronic Check Transactions And Otherwise Manage Your Online Store.

To Open Merchant Reports And Tools For Your E-Store, Click **Reports** In The Navigation Section Of Virtual LinkPoint Administration. A New Browser Window Will Be Launched, And The Main Reports Page For Your Store Will Be Displayed. Once Reports Is Launched, Click **Help** For Instructions On Generating Reports And Performing Management Tasks.

The *Merchant Reports And Tools* Publication And Help System Provide Full Details About Accessing Reports Information And Administration Tools. For Your Convenience, The Procedures To Do Several Frequently Performed Tasks Through Merchant Reports And Tools Are Included Here.

Note: Some Functionality Described Below Is Also Available Using The Virtual LinkPoint Point-Of-Sale Screens.

Tasks Performed Through Merchant Reports And Tools

Checking The Status Of Credit Card And Electronic Check Transactions

This Is The Procedure To View The Current Status Of Credit Card And Check Transactions:

1. Click **View Transactions** In The Main Reports Menu.
2. In The View Transactions Screen, Select Search Criteria, Select The Time Period, And Click The **Submit Query** Button.

The Approval Column On The Transactions Processed Report Is Especially Important To The Merchant. It Is Here That The Most Recent Status Of Transactions That Are Being Processed Is Displayed.

For Credit Card Transactions, The Response Is In The Following Format:

- If The Transaction Is Approved, The Response Is “Y” Followed By An Authorization Number And An Address Verification System (AVS) Code.
- If The Transaction Is Declined, The Response Is “N” Followed By A Reason For The Decline.

Since Credit Card Transactions Are Approved Or Denied Immediately, The Status Shown In The Approved Column Will Not Change.

For Electronic Check Transactions, The Response Appears In The Following Format:

Y/N:Account_Type_Check_Number:Status

- If The First Character Is “Y,” The Check Is Either Somewhere In Process Or Funded.

- If The First Character Is “N,” The Check Has Been Declined.
- The Account_Type Is : PC (Personal Checking); Ps (Personal Savings); Bc (Business Checking) And Bs (Business Savings)
- The Check_Number Is The Seven Digit Check Number (Right Justified And Padded With Zeros If Necessary)
- The Status Is One Of The Following:

  NEW – The Check Has Not Yet Been Sent To The Electronic Check Processor

  PENDING – The Check Is Being Processed By The Electronic Check Processor

  FUNDED – The Check Has Been Funded By The Electronic Check Processor

  “Text” – The Reason Why The Check Has Been Declined

Examining The Status Of Electronic Check Transactions Is Especially Important, Because You Will Want To Delay Shipment Of Goods Ordered Until The Status Of The Transaction Reaches FUNDED. This Is The Usual Sequence Of Check Authorization Status Events.

1. When A Check Authorization Is Submitted Through The Virtual LinkPoint Check Authorize Form, The Transaction Is Written To The LinkPoint Secure Payment Gateway Database. If You Were To Look At The Transactions Processed Report For Your Store, All Check Authorization Transactions Inserted In The Database During The Current Day Would All Display NEW Status.
2. At 12:01a.M. Daily, The LinkPoint Payment Transaction Engine Automatically Surveys The Database And Selects The Payment By Check Transactions That Have Been Entered In The Previous 24-Hour Period. This Sequence Is Fixed And Cannot Be Accomplished Manually. This NEW Batch Is Sent Off To The Electronic Check Processor, So That The Information Can Be Verified With The Actual Bank Checking Accounts Offered For Satisfaction Of Payment For The Online Purchase. During This Verification Process, Which May Require Up To Three (3) Business Days, The Transaction Is Flagged On The Transactions Processed Report As PENDING.

   As Long As The Transaction Is PENDING, No Funds Will Be Transferred To The Merchant's Account And The Merchant Should Not Consider Shipping The Goods That Have Been Purchased.
3. As Responses Are Received By The Electronic Check Processor (This Also Happens Once Each Day), Status Codes Are Updated In The Approval Field Of The Transactions Processed Report. Positive Confirmations Trigger The Approval Status FUNDED, Allowing Settlement Of The Transaction And Transferring The Amount Of The Purchase To The Merchant's Account.

   When An Electronic Check Transaction Is FUNDED, The Merchant May Confidently Ship The Goods That Were Purchased To The Customer.

   If Denials (For Example, "Insufficient Funds" Or "Payment Stopped") Are Received, The Reason For The Denial Is Displayed. You Are Encouraged To Have To Have A Procedure In Place (E-Mail, Telephone, Letter, Etc.) To Notify Customers When Payment Is Declined And Invite Them To Provide An Alternate Method Of Payment.

Note: An Electronic Check Transaction May Display FUNDED, Then Change To A Declined Value For Up To Sixty (60) Days Following Funding.

Important: It Is Important That Merchants Follow Good E-Commerce Business Practices And Carefully Check All Pending Orders Before Fulfilling Them.

Confirming Shipment Of Hard Goods For A Credit Card Authorization

If An Order Is Submitted As An Authorize Only (Not A Sale) Transaction, The Order Is In "Authorized" State Once The Credit Card Processor Has Accepted It. This Means That The Amount Of Money That Was Charged Has Been Reserved For You, But The Money Cannot Be Collected By You Until You Confirm That The Product(S) The Customer Bought Have Been Shipped.

To Complete The Order, You Must Confirm Shipment Of The Item. Confirming Shipment Moves The Sale To "Captured" State; The Funds Previously Reserved Are Actually Charged To The Account Following Capture. You Can Do This By Initiating A Ticket Only Transaction From The Virtual LinkPoint Ticket Only Form, Or By Using Merchant Reports And Tools.

Important: It Is Important That Merchants Follow Good E-Commerce Business Practices And Carefully Check All Pending Orders Before Fulfilling Them And Confirming Shipment.

If You Want To Confirm Shipment And Initiate Capture From Merchant Reports And Tools:

1. Click **View Orders** In The Main Reports Menu.
2. On The View Orders Screen, Select Search Criteria, Select The Time Period, And Select The **Only Show Unshipped Orders** Check Box And Click The **Submit Query** Button.
3. On The Orders Received Screen, Select The Check Box In The **Select** Column Beside The Unshipped (Indicated By “N” In The **Shipped** Column) Order Or Orders You Want To Work With, And Click The **Work With Selected Orders** Button.

   Note: If You Did Not Select The **Only Show Unshipped Orders** Check Box In The View Orders Screen, The Orders Received Screen Will Display Both Shipped (Indicated By “Y”) And Unshipped (Indicated By “N”) Orders For The Specified Time Period.

4. In The Selected Orders Menu Screen, Select **Confirm Shipment Of Merchandise**, And Click The **Submit Query** Button.

Important: Authorization Reserves Funds For Varying Periods, Depending On The Issuing Credit Card Company’s Policy. This Period May Be As Little As Three Days Or As Long As Several Months. For Your Protection, We Strongly Suggest That You Confirm Shipment As Soon As Possible After Authorization. If You Ship Goods, Then Discover That The Authorization Has Expired, Contact Your Credit Card Processor For Instructions.

Fully Crediting A Credit Card Purchase

You Can Credit An Order Paid By Credit Card By Initiating A Return Transaction From The Virtual LinkPoint Return Form, Or By Using Merchant Reports And Tools.

If You Want To Credit An Entire Order From Merchant Reports And Tools:

1. Click **View Orders** In The Main Reports Menu.
2. On The View Orders Screen, Select Search Criteria, Select The Time Period And Click The **Submit Query** Button.
3. On The Orders Received Screen, Select The Check Box In The **Select** Column Beside The Order Or Orders You Want To Credit.

Important: Be Aware That When You Work With A Group Of Orders, The Whole Group Of Selected Orders Is Affected When Any Changes Are Made. For Example, If You Issue A Credit To One Customer In A Group Of Orders, The Whole Group Is Credited.

4. On The Selected Orders Menu Screen, Select **Credit The Entire Amount Of The Order**.
5. Click The **Submit Query** Button.

You Cannot Credit A Check Transaction From The Virtual LinkPoint Interface Or From Merchant Reports And Tools. You Must Address The Refund The Online Check Authorization System.

Partially Crediting A Credit Card Purchase

You Can Credit Part Of An Order Paid By Credit Card By Initiating A Return Transaction From The Virtual LinkPoint Return Form, Or By Using Merchant Reports And Tools.

If You Want To Credit Part Of An Order Through Merchant Reports And Tools:

1. Click **View Orders** In The Main Reports Menu.
2. On The View Orders Screen, Select Search Criteria, Select The Time Period And Click The **Submit Query** Button.
3. To See The Details Of An Individual Order, In The Orders Received Screen, Click An Order Number In The **Order #** Column. The Order Number Receipt For That Order Displays.
4. At The Bottom Of The Order Number Receipt Is An Option To Credit All Or Part Of The Order Back To The Customer. To Issue A Credit, Enter The Amount To Be Credited In The Dialog Box, And Click The **Credit Order** Button.

   Note: If A Credit Is Issued, The Dollar Amount Of The Credit Is Subtracted From The Original Sale Amount. If You Return To The Orders Received Screen Later, It Is Possible For An Order To Be Associated With A Zero Dollar Amount. This Occurs When The Full Sale Amount Has Been Credited Back To The Customer By The Merchant. Orders Cannot Be Removed From The Reports.

Generating A Batches Report For Credit Card Or Electronic Check Transactions

Use The Batches Screen To Select Search Criteria And Generate A Batch Report For Credit Card Or Electronic Check Transaction Batches.

Note: A Credit Card Batch And A Check Batch Are Not Equivalent (A Credit Card Batch Is Being Readied For Settlement, While A Check Batch Is Being Readied For Processing), But The Procedure To Generate A Report Is Very Similar.

1. Click **View Credit Card Batches** Or **View Check Batches** In The Main Reports Menu.
2. Select The Time Period For Which You Want To Generate The Report By Selecting One Of The Radio Buttons. If You Select "The Last __ Days," Fill In The Number Of Days You Want To Include (Maximum Is 999). If You Select "From ___ To ___," Use The Menus To Select The Range Of Dates For Which You Want To Generate A Report.
3. Click The **Submit Query** Button To Generate The Report.

The Batches Report Shows The Count Of Transactions Included In The Batch Closing Specified, The Response ("Y" Or "N") And The Total Amount. Click The Total For Detail On The Transactions Included In The Batch.

Voiding A Credit Card Or Electronic Check Transaction

Voids Are Initiated From A Report On The Current (Unsettled) Batch. A Void Reverses A Transaction That Has Not Yet Been Settled (In The Case Of Credit Card Transactions) Or Transmitted (In The Case Of Check Transactions).

This Is The Procedure To Issue A Void:

1. Click **View Credit Card Batches** Or **View Check Batches** In The Main Reports Menu.
2. Select Any Time Period That Includes Today's Date (For Example, Choose **This Month** Or **Today**, But Not **Last Calendar Month**), Then Click The **Submit Query** Button.
3. From The Credit Card Batches Or Check Batches Reports Generated, Click **Current Batch** To Display A Report Similar To The One Displayed Below.

Batch

Select	Order #	Date	User ID	Type	Card Number	Exp. Date	Approval	Amount
☐	EDA000	11/05/98 14:12		PostAuth	4005...0019	12/1999	Y:Accepted	1.00
☐	EDS000	11/05/98 14:09		Sale	4005...0019	12/1999	Y:55TEST5f62000014:YNA	1.00
☐	EDS000	11/05/98 14:10		Credit	4005...0019	12/1999	Y:Accepted	1.00
☐	EDS001	11/05/98 14:10		Sale	4005...0019	12/1999	Y:24TEST5f62000015:YNA	1.00
☐	EDS002	11/05/98 14:10		Sale	4005...0019	12/1999	Y:48TEST5f62000016:YNA	1.00
5 Transactions Listed								3.00

Void Selected Transactions

Figure 10. Current Batch Report Detail

4. All Transactions Included In The Current Open Batch Are Displayed. The Display Includes A Check Box In The Select Column For Each Transaction Available To Be Voided. Select The Check Box For The Transaction Or Transactions To Void, Then Click The **Void Selected Transactions** Button.

If You Prefer To See The Detail About A Transaction Before Deciding Whether To Void It, Click The Order Number To Display The Order Number Receipt. At The Bottom Of The

Order Number Receipt, A List Of All Transactions Associated With The Order Number Is Displayed. Transactions That Are Available To Be Voided Display A **Void** Button In The Left Column. Click The **Void** Button To Void The Transaction.

Setting Credit Card Batch Time

Settlement Of Credit Card Transactions Is Initiated Automatically At The End Of Each Day. By Default, Settlement Is Initiated At 12:01 A.M. If You Prefer To Run Settlement Of A Credit Card Batch At A Different Time, You Can Select A New Batch Closing Time.

Closing Time Of Check Transaction Batches May *Not* Be Altered.

This Is The Procedure To Change The Credit Card Batch Settlement Time:

1. Click **Merchant Reports Administration** In The Main Reports Screen.
2. On The Merchant Reports Administration Screen, Select **Set Batch Time**.
3. On The Set Batch Time Screen, Select When Settlement Should Run From The Pull-Down Menus, And Click The **Change** Button.

Manually Running Credit Card Batch

Settlement (Or "Batch") Of Credit Card Transactions May Be Run Manually. Batches Of Check Transactions May *Not* Be Manually Run.

This Is The Procedure:

1. Click **Merchant Reports Administration** In The Main Reports Screen.
2. In The Merchant Reports Administration Screen, Select **Manually Run Batch**.

All Credit Card Transactions Accumulated Since The Last Time Batch Was Run Are Submitted For Settlement.

Index