

User Guide

Global Payments

Virtual Terminal – Portico



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1–Overview

The Virtual Terminal – Portico is a “virtual terminal” that processes credit cards over a secure internet connection. Virtual Terminal – Portico records the card information and dollar amount, then transmits this information to the host for further processing. The host then contacts the credit card issuer, receives an authorization, and displays the issuer’s authorization response. Additionally, the Virtual Terminal – Portico provides easy-to-use reporting.

Virtual Terminal – Portico offers some great benefits:

- Secure online transactions
- Auto close (batch settlement)
- Level 2 B2B (use of business and corporate credit cards)
- Simple navigation
- Easy setup
- Versatile reporting
- Credit
- Batch upload
- Recurring / subscription billing (via PayPlan)

Virtual Terminal – Portico can be used to process the following transactions:

Table 1-1 Transactions Types

Transaction Types	Transactions	Notes
Credit Card	<ul style="list-style-type: none">• MOTO (manual only)• Authorization• Return• Account verify• Tip adjustment• Void	These transactions can be manually entered

The following reports are available in the Virtual Terminal – Portico:

Table 1-2 Reporting Batch Type

Reporting Batch Type	Description
Current Batch Summary	<ul style="list-style-type: none"> • Displays a summary of the current batch – a total of all card types. • Sort the current batch by Card Type, Credit Amount, Credit Count, Debit Amount, Sale Amount, Sale Count, Return Amount, Return Count, Total Amount, Total Count, and Gratuity Amount.
Current Batch Details	<ul style="list-style-type: none"> • Provides a list of transactions in the current batch. • Provides the ability to export the current batch transactions to XML, PDF, CSV, Tab Delimited, or Excel. • Provides the ability to print the report. • Displays specific transactions within the current batch to reprint the transaction receipt, email the transaction receipt, or void the transaction. • Provides the ability to adjust a transaction, attach a document to the transaction, and close the batch.
Transactions Summary	<ul style="list-style-type: none"> • Allows you to search for specific transactions by transaction number or other search criteria including Start Date, End Date, Batch ID, Batch Sequence Number, and Clerk ID. • Provides a list of transactions that match the search criteria.
Find Transactions Details	<ul style="list-style-type: none"> • Allows you to search for specific transactions by transaction number or other search criteria including transaction date, status, card type and other criteria. • Displays specific transactions to reprint the transaction receipt, email the transaction receipt, void the transaction or return the transaction. • Provides the ability to void or return the transaction based on the batch status of the transaction. • Provides the ability to adjust a transaction or attach a document to the transaction.
Historical Batch	<ul style="list-style-type: none"> • Displays a summary of the closed batch—a total of all card types. • Allows you to search for batches by Start Date and End Date. • Provides the ability to export the closed batch transactions to XML, PDF, CSV, Tab Delimited, or Excel. • Allows you to sort the historical batch by Device ID, Batch ID, Batch Sequence Number, Batch Status, Open Date, Close Date, Open Transaction Number, Batch Transaction Amount, and Batch Transaction Count. • Displays specific transactions within the selected batch to reprint the transaction receipt, email the transaction receipt, or return the transaction.

System Requirements (Online)

The following is a list of required hardware and software components to run the Virtual Terminal – Portico:

Table 1-3 System Requirements (Online)

Type	Compatible
Hardware	<ul style="list-style-type: none">● Laptop<ul style="list-style-type: none">○ Internet connection● PC<ul style="list-style-type: none">○ Internet connection○ Keyboard○ Mouse○ Monitor
Operating Systems	<ul style="list-style-type: none">● Windows 7, 8.1, 10 or 11● Mac OS X El Capitan or higher
Browsers	<ul style="list-style-type: none">● Internet Explorer 10 or 11● Google Chrome● Microsoft Edge● Safari

Menu structure

Upon logging into the Virtual Terminal – Portico, the Card Payment screen is the default landing screen. Credit transactions can be run from this screen. The default selection is **Credit > MOTO**.

To expand the main menu, click the **three bars** (we call it the hamburger) immediately to the right of the Global Payments logo.

The screenshot shows the Global Payments Virtual Terminal interface. At the top, there is a header with the logo, a hamburger menu icon, and user information: "PVT TRAINING CANADA - 3381 STEELES AVE E." and "3337 - KENT GIFT SHOP". On the right, there are language and location dropdowns: "ENGLISH" and "KENT". Below the header is a navigation bar with tabs: "TRANSACTIONS", "SALE", "RETURN", "VERIFY", and "UPLOAD BATCH". The main content area is split into two panels. The left panel is titled "Checkout" and contains input fields for "CHARGE AMOUNT*" (\$0.00), "TAX AMOUNT" (\$0.00), and a "TOTAL:" of \$0.00. There is a "Clear" button and a "TAX EXEMPT" checkbox. The right panel is titled "Credit Payment" and shows "AMOUNT DUE \$0.00". A "MOTO" button is highlighted with a green box. Below this are fields for "CARD NUMBER*", "SECURITY CODE*", "INVOICE NUMBER(S)", "CUSTOMER INFORMATION" (including "CUSTOMER ID", "STREET*", "PHONE", "FIRST NAME", "CITY", "LAST NAME", "STATE / PROVINCE", "EMAIL"), and "DESCRIPTION". There are also checkboxes for "AUTH ONLY" and "ALLOW DUPLICATE", and a "Process" button.

Click the **x** to close the menu.

This screenshot shows the same interface as the previous one, but with the main menu expanded. The menu is located on the left side of the screen and includes the following items: "Transactions" (with a red 'x' close button), "Sale", "Return", "Verify", "Upload Batch", "PayPlan", "Reports", "Admin", "User Management", and "Support". The background content is dimmed, showing the "Credit Payment" screen with the "MOTO" option still highlighted.

2–Procedures

General tasks

Once you have access to the Virtual Terminal – Portico per the welcome email you received, you should be able to log in and begin using the service.

Login

1. Navigate to <https://terminal.globalpay.com/vt/auth/login>
2. Type your user name and password in the corresponding fields.
3. Click **Sign In**.

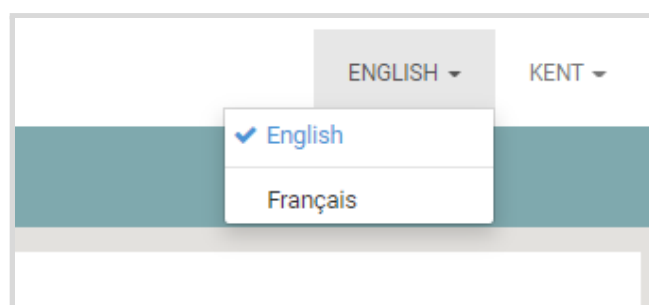
Password requirements

To comply with industry standards, the Virtual Terminal – Portico requires a strong password that complies with all of the following guidelines:

- Is between eight (8) and 16 characters
- Contains at least one number
- Contains at least one letter
- Contains at least one special character (@ # \$ % ^ & * - _ + = [] { } | \ : ' , ? / ` ~ " () ;)
- Has not been recently used (not one of the last 10 passwords used)

Language toggle

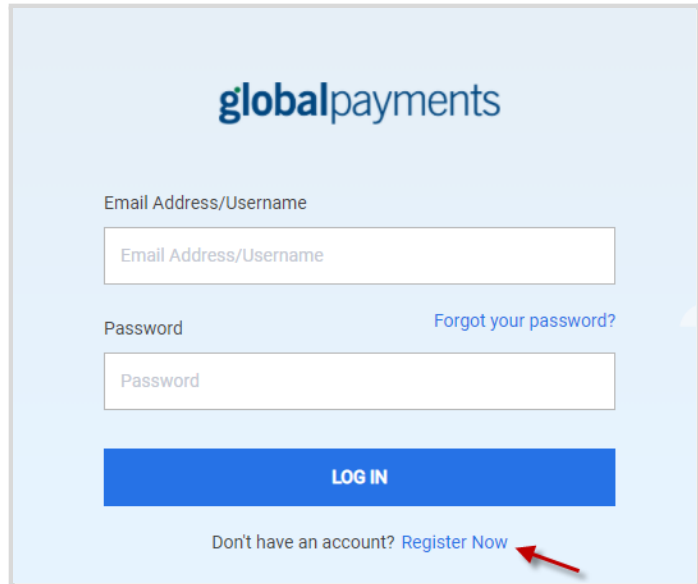
Virtual Terminal – Portico supports both English and French. To toggle between languages, use the dropdown menu at the upper right-hand corner of the screen.



Registration

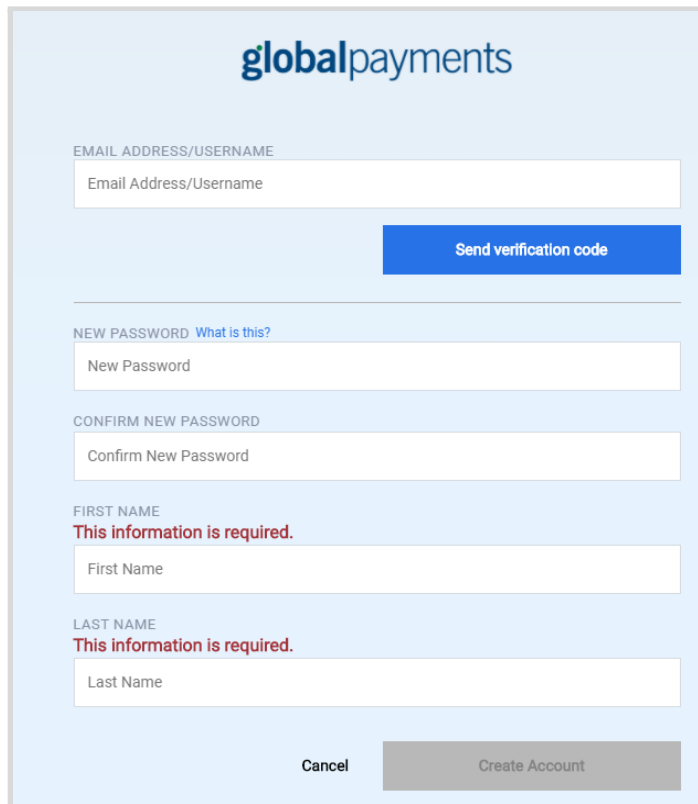
During initial login, if you do not already have a username and password, you will need to register.

1. Click **Register Now**



The screenshot shows the Global Payments login page. At the top is the 'globalpayments' logo. Below it are two input fields: 'Email Address/Username' and 'Password'. To the right of the password field is a link that says 'Forgot your password?'. Below these fields is a blue button labeled 'LOG IN'. At the bottom of the page, there is a link that says 'Don't have an account? Register Now', which is highlighted with a red arrow.

2. Input your username (email address) and click **Send verification code**



The screenshot shows the Global Payments registration page. At the top is the 'globalpayments' logo. Below it is an input field for 'EMAIL ADDRESS/USERNAME' with the placeholder text 'Email Address/Username'. To the right of this field is a blue button labeled 'Send verification code'. Below this is a section for 'NEW PASSWORD' with a link 'What is this?' and an input field for 'New Password'. Below that is a section for 'CONFIRM NEW PASSWORD' with an input field for 'Confirm New Password'. Below that are two sections for 'FIRST NAME' and 'LAST NAME', each with a red error message 'This information is required.' and an input field for the respective name. At the bottom right, there are two buttons: 'Cancel' and 'Create Account'.

3. Check your inbox for the verification code. Enter it in the Verification Code field and click **Verify code**

The screenshot shows the 'globalpayments' logo at the top. Below it is a form with two input fields: 'EMAIL ADDRESS/USERNAME' containing 'Testemail@test.com' and 'VERIFICATION CODE' containing 'Verification code'. At the bottom, there are two buttons: 'Send new code' and 'Verify code'.

4. With your email now verified, key in the following:

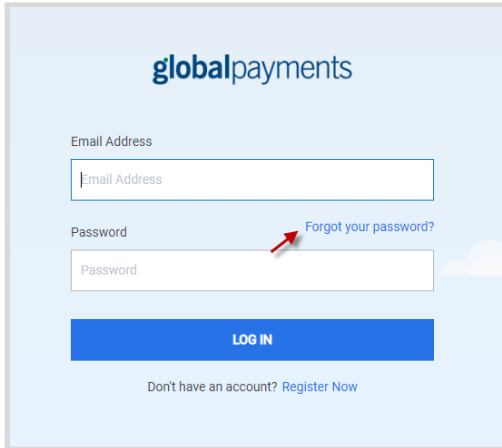
- a. New Password
- b. Confirm New Password
- c. First Name
- d. Last Name
- e. Click **Create Account**

The screenshot shows the 'globalpayments' logo at the top. Below it is a form with the following fields and elements: 'EMAIL ADDRESS/USERNAME' containing 'Testemail@test.com', a green checkmark and message 'E-mail address verified. You can now continue.', a 'Change e-mail' button, 'NEW PASSWORD' with a 'What is this?' link, 'CONFIRM NEW PASSWORD', 'FIRST NAME' with a red error message 'This information is required.', and 'LAST NAME' with a red error message 'This information is required.'. At the bottom, there are 'Cancel' and 'Create Account' buttons.

Reset password

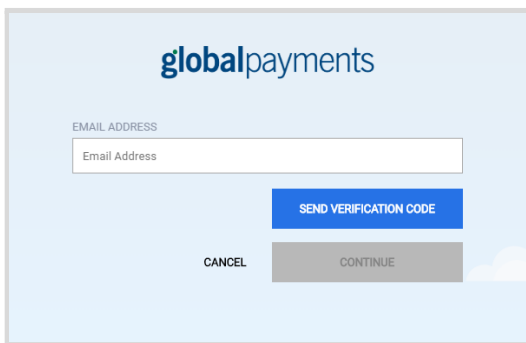
NOTE: If you input an incorrect password 5 times, your account will be locked. If this occurs, you will follow these steps to reset your password:

1. Click **Forgot your password?**



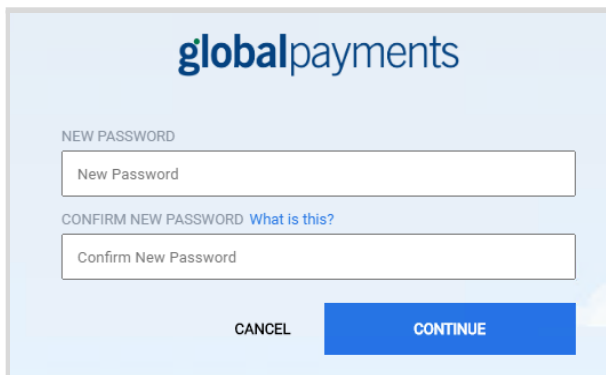
The screenshot shows the Global Payments login interface. At the top is the 'globalpayments' logo. Below it are two input fields: 'Email Address' and 'Password'. To the right of the 'Password' field is a blue link that says 'Forgot your password?'. A red arrow points to this link. Below the input fields is a blue 'LOG IN' button. At the bottom, there is a link that says 'Don't have an account? Register Now'.

2. Type the Email Address and click **Send Verification Code**



The screenshot shows the 'Forgot your password?' screen. At the top is the 'globalpayments' logo. Below it is an input field labeled 'EMAIL ADDRESS' with the placeholder text 'Email Address'. To the right of the input field is a blue button labeled 'SEND VERIFICATION CODE'. Below the input field and button are two buttons: 'CANCEL' and 'CONTINUE'.

3. Key in the Verification Code, then click **Continue**
4. Key in your New Password and Confirm New Password, click **Continue**



The screenshot shows the 'New Password' screen. At the top is the 'globalpayments' logo. Below it are two input fields: 'NEW PASSWORD' with the placeholder text 'New Password' and 'CONFIRM NEW PASSWORD' with the placeholder text 'Confirm New Password' and a blue link that says 'What is this?'. Below the input fields are two buttons: 'CANCEL' and 'CONTINUE'.

5. Login with your username and new password

Multi-factor authentication

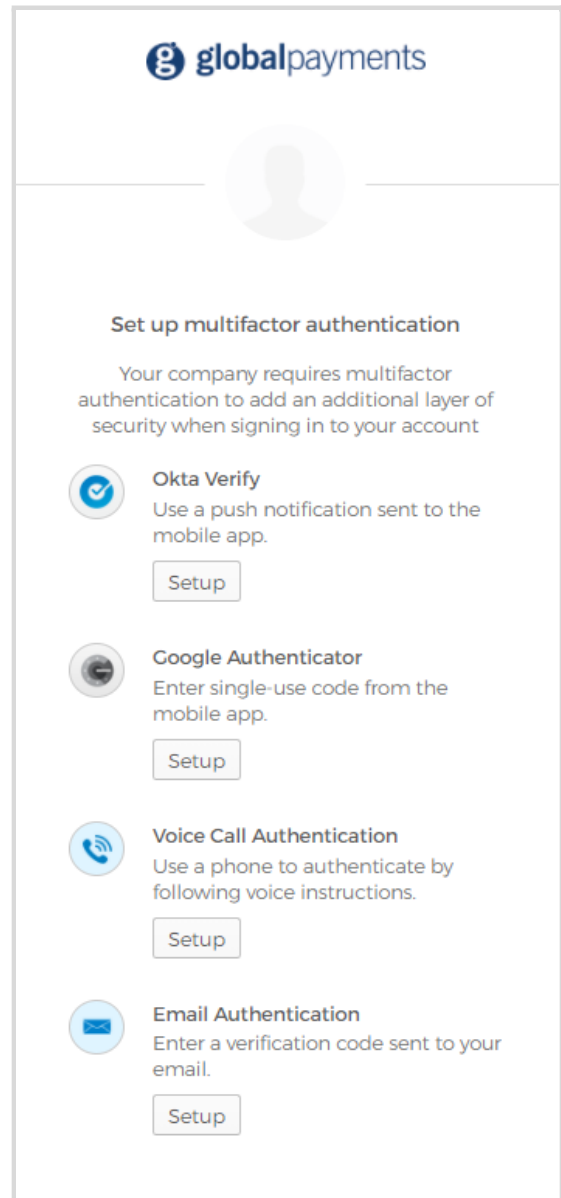
Virtual Terminal – Portico is enabled for multi-factor authentication. This is a mandatory step in order to allow user access.

Multi-factor authentication (or MFA) protects your account from unauthorized access, ensuring the user logging onto your Virtual Terminal – Portico account is in fact who they are.

Register for multi-factor authentication

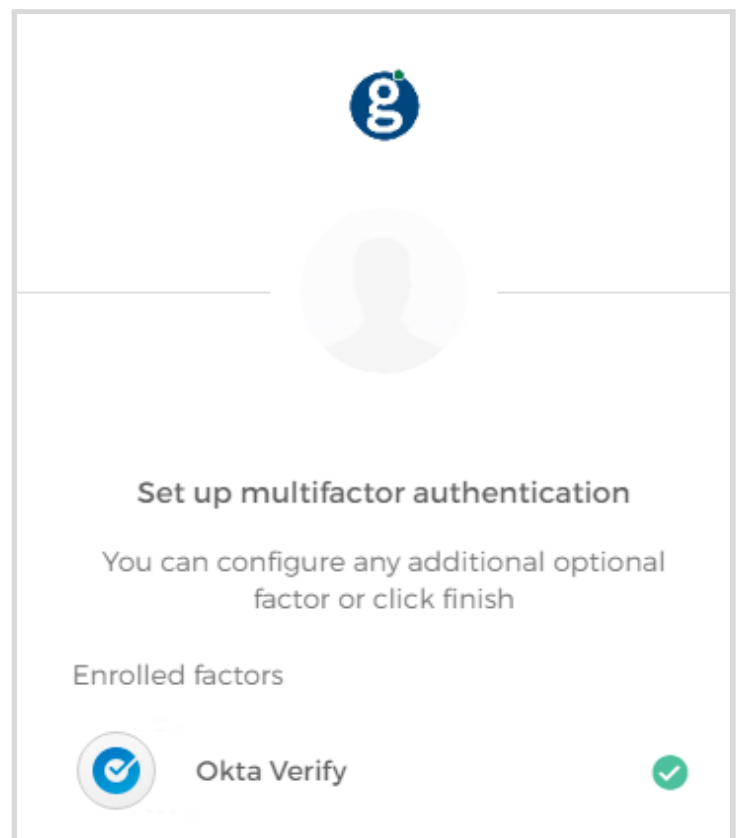
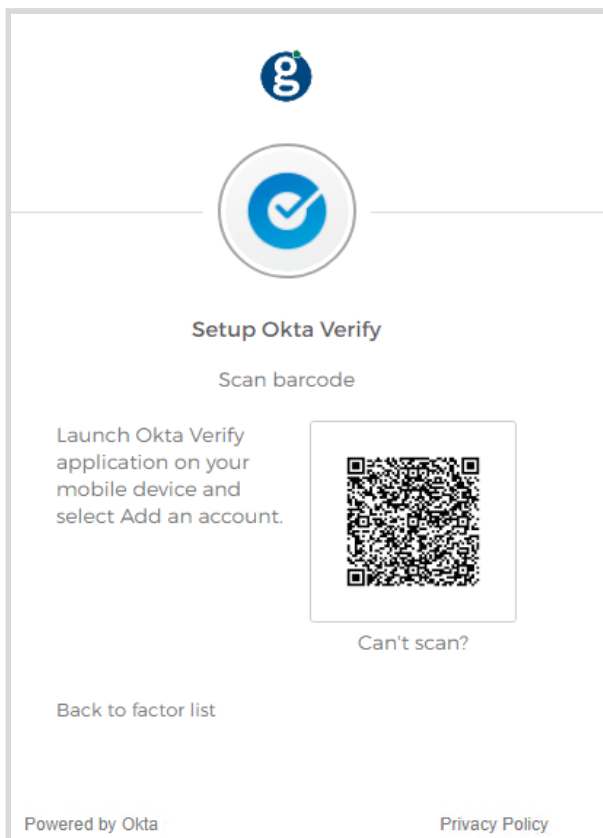
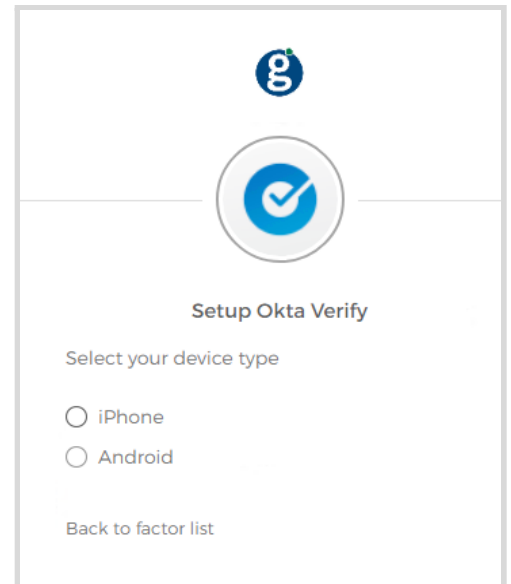
Upon logging in to Virtual Terminal for the first time, registration is required. You must sign up for one or more authentication options. We recommend you sign up for more than one authentication option. The following three methods are supported:

- Okta Verify mobile app
- Google / MS Authenticator mobile app
- Voice Call Authentication
- Email Authentication



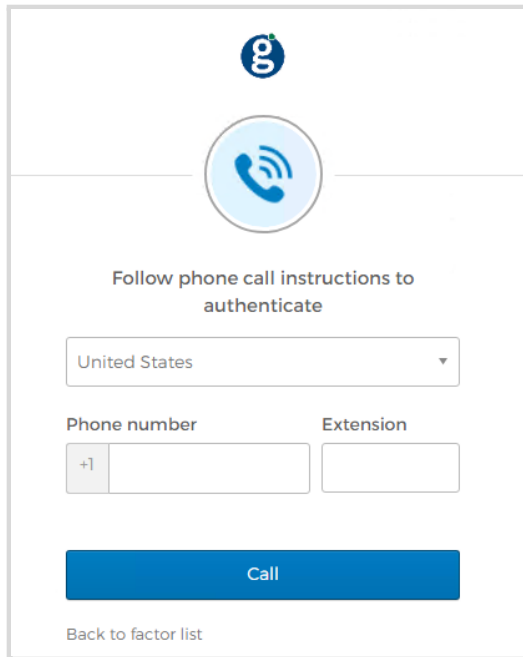
Register via Okta Verify / Google / Microsoft Authenticator mobile app

1. Select iPhone or Android
2. Download the Okta Verify (multi-factor authentication) mobile application from Google Play Store or the iOS App Store onto your mobile device. **Alternatively, you can also use other MFA applications such as the Microsoft or Google Authenticator app.
3. Scan the QR Code with your Mobile Device
4. Mobile app enrollment is successful.




Register via Voice Call

1. Key in Phone number and Extension (if applicable) and click **Call**.



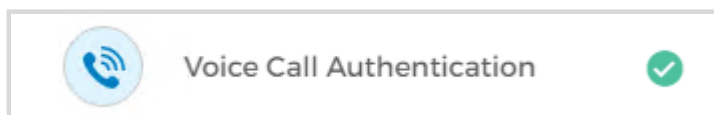
The screenshot shows a registration form for voice call authentication. At the top, there is a logo and a circular icon with a phone handset and signal waves. Below this, the text reads "Follow phone call instructions to authenticate". There is a dropdown menu currently set to "United States". Underneath, there are two input fields: "Phone number" with a "+1" prefix and "Extension". A large blue "Call" button is positioned below the input fields. At the bottom left, there is a link that says "Back to factor list".

2. Enter Code and click **Verify**



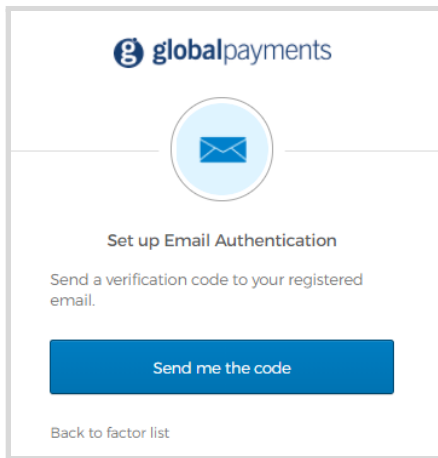
The screenshot shows a form titled "Enter Code". It features a single large text input field with a vertical cursor on the left. Below the input field is a large blue "Verify" button.

3. You have been successfully enrolled in Voice Call authentication



Register via Email Authentication

1. Click **Setup**, then click **Send me the code**.



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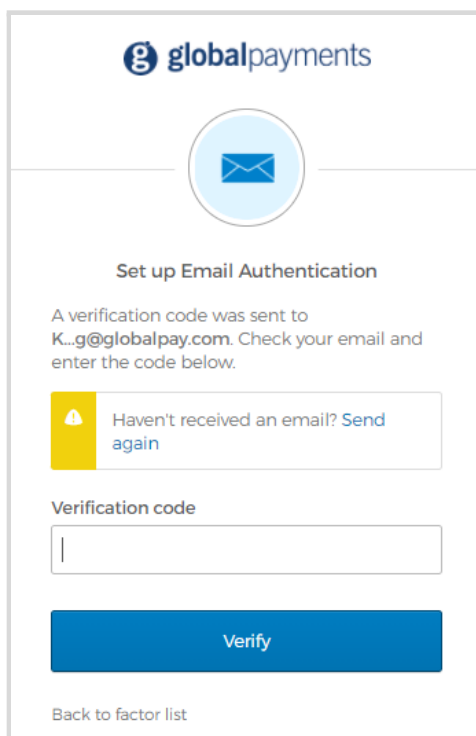
Set up Email Authentication

Send a verification code to your registered email.

Send me the code

Back to factor list

2. Obtain the code from your mailbox, then enter the code.



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Set up Email Authentication

A verification code was sent to K...g@globalpay.com. Check your email and enter the code below.

Haven't received an email? [Send again](#)

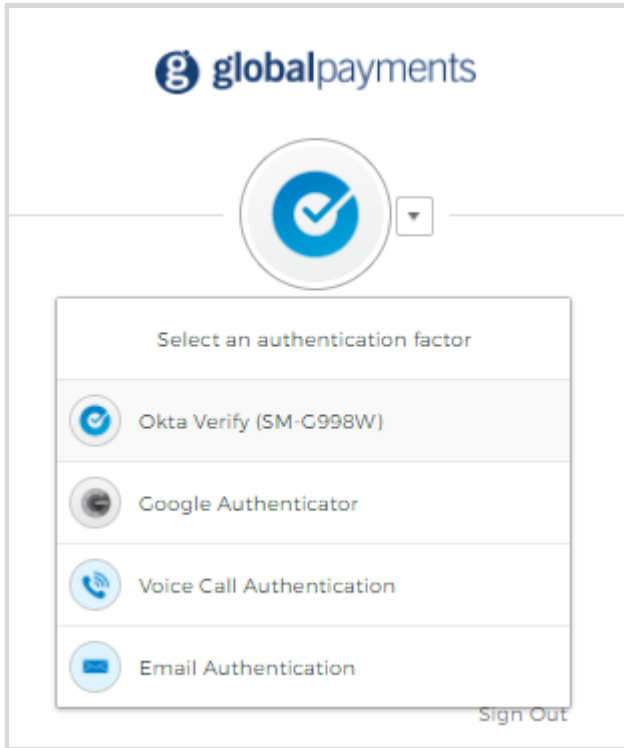
Verification code

Verify

Back to factor list

Multi-factor authentication challenge

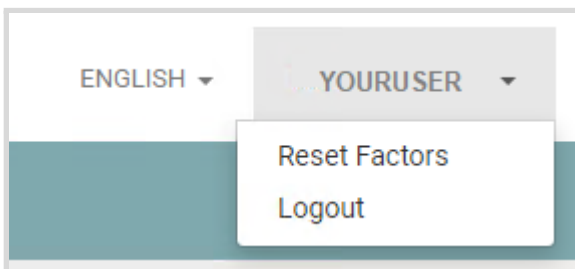
If you are enrolled in multiple factors, the screen defaults to the most recent factor used. click the down arrow to select the preferred authentication factor.



Reset Factors

This should be used to reset your MFA, if necessary. Please note, this resets all enrolled multi-factors.

1. Click your Username in the upper-right-hand corner of the screen, then select **Reset Factors**



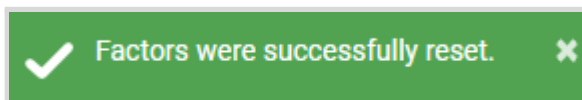
2. Check **I Agree** and click **Confirm**.

Confirm Factors Reset

⚠ Caution: This will reset all multifactor authentication methods associated with this user. You will be logged out immediately, and will need to set up new multifactor methods. This option cannot be undone. Do you wish to proceed?

I AGREE

3. If successful, you will receive confirmation of factor reset.



Enter card data

Throughout the Virtual Terminal – Portico user documentation, the step “Enter card data” refers to the following:

- Enter **card data** manually. For Credit Payment and PayPlan, manual entry of the credit card info can be done via a keyboard

AVS and CVV Actions

Virtual Terminal – Portico offers a fraud management feature to protect you from potential fraudulent activities.

If this feature is enabled, when the Issuer Response is received for a transaction, the AVS and CVV result values are screened by Portico. If the AVS and/or CVV information submitted do not match with the information at the issuing bank for the card, certain actions are automatically taken, including:

ACCEPT / DECLINE / PROMPT


- If any AVS or CVV response code is set at boarding to **DECLINE**, then the transaction will be declined.
- If any AVS response code is set at boarding to **PROMPT**, then a pop-up prompt displays asking whether the user wants to accept or decline the transaction. For PayPlan Add Credit Card, the user will be prompted whether they want to save the card. If saved, future one time transactions will continue to prompt due to AVS mismatch.
- If the user clicks Accept, the transaction result popup will display indicating the approval. If the user clicks Decline, a reversal message will be sent. If the reversal is successful, the transaction result popup will display indicating declined or reversed.
- If the reversal fails for any reason (this is unlikely), the user will see an error message. Click **OK**. The transaction approval will display; the void icon will be enabled at the top of the screen. The transaction will need to be voided.

*These features are disabled by default. If you wish to enable or change the above configuration, please contact our [support team](#).

Print a receipt

When you process any type of transaction, you are shown a transaction result page. This allows the option to print the transaction receipt.




1. To print the receipt, click the **Print Receipt** button  in the lower-left corner of the transaction result page.
2. To print customer and merchant copies (default setting), click **Print**. Step Result: Your computer's print dialogue is displayed.
3. Follow your computer's prompts to print a copy of the receipt. You can print the merchant copy, customer copy, or both.

Email a receipt

When you process any type of transaction, you are shown a transaction result page. Here you can choose to email a receipt instead of printing.



1. To email the receipt, click the **Email Receipt** button  in the lower left portion of the transaction result page. Step Result: An Email Receipt dialog is displayed with the email address associated with the transaction in the To: line (if one was added).


A screenshot of the 'Email Receipt' dialog box. It has a title bar 'Email Receipt' and a message: 'You may add up to 10 email address recipients'. Below this is a text input field with the placeholder text 'Enter email address...'. At the bottom, there are three buttons: 'Add +', 'Cancel', and 'Send'.

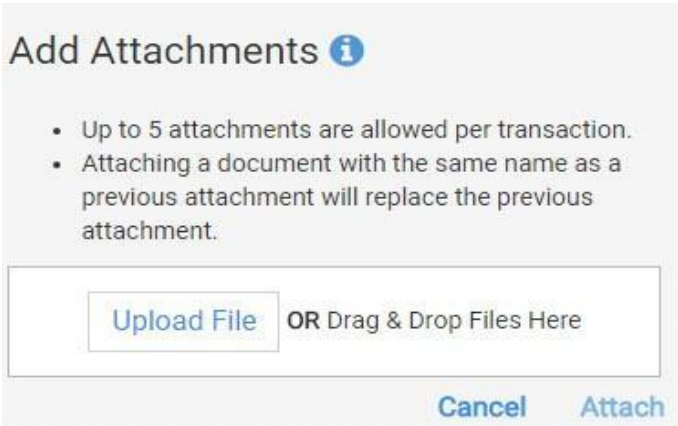
2. To add an email address, type it in the text box. To add additional email addresses, click the **Add+** link and type it in the additional text box.
3. When the appropriate email addresses is entered, click **Send**.

Attaching a document

Virtual Terminal – Portico provides the ability to attach a document to a transaction.



1. To attach a document to a transaction, click the  icon in the lower-left portion of the transaction result page. This will display the **Add Attachments** dialog.

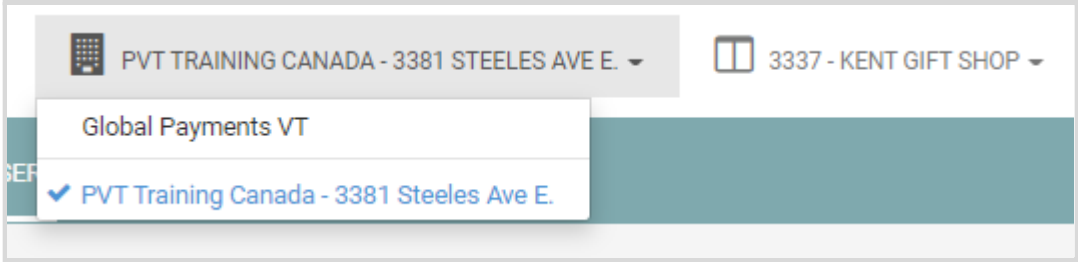


2. You can either click the **Upload File** button which will display the File Explorer window where you can navigate to the file that you want to attach -OR- you can drag and drop the selected file onto the **"Drag & Drop Files Here"** section of the **Add Attachments** dialog.
3. After you have selected the appropriate files (up to a maximum of 5 files), click **Attach**.

Switch merchant sites

Businesses with more than one location can establish multiple sites.

1. To switch between merchant sites, click the arrow for the Site drop-down list located in the header band at the top of the screen.



2. Select the desired site.

Switch terminal devices

Merchants with more than one terminal can register multiple devices for each site. This provides more control and better reporting.

1. To switch devices, click the arrow for the device drop-down list located in the header band at the top of the screen.



2. Select the desired device.

3–Credit card transactions

Use the Virtual Terminal – Portico to process credit card transactions.

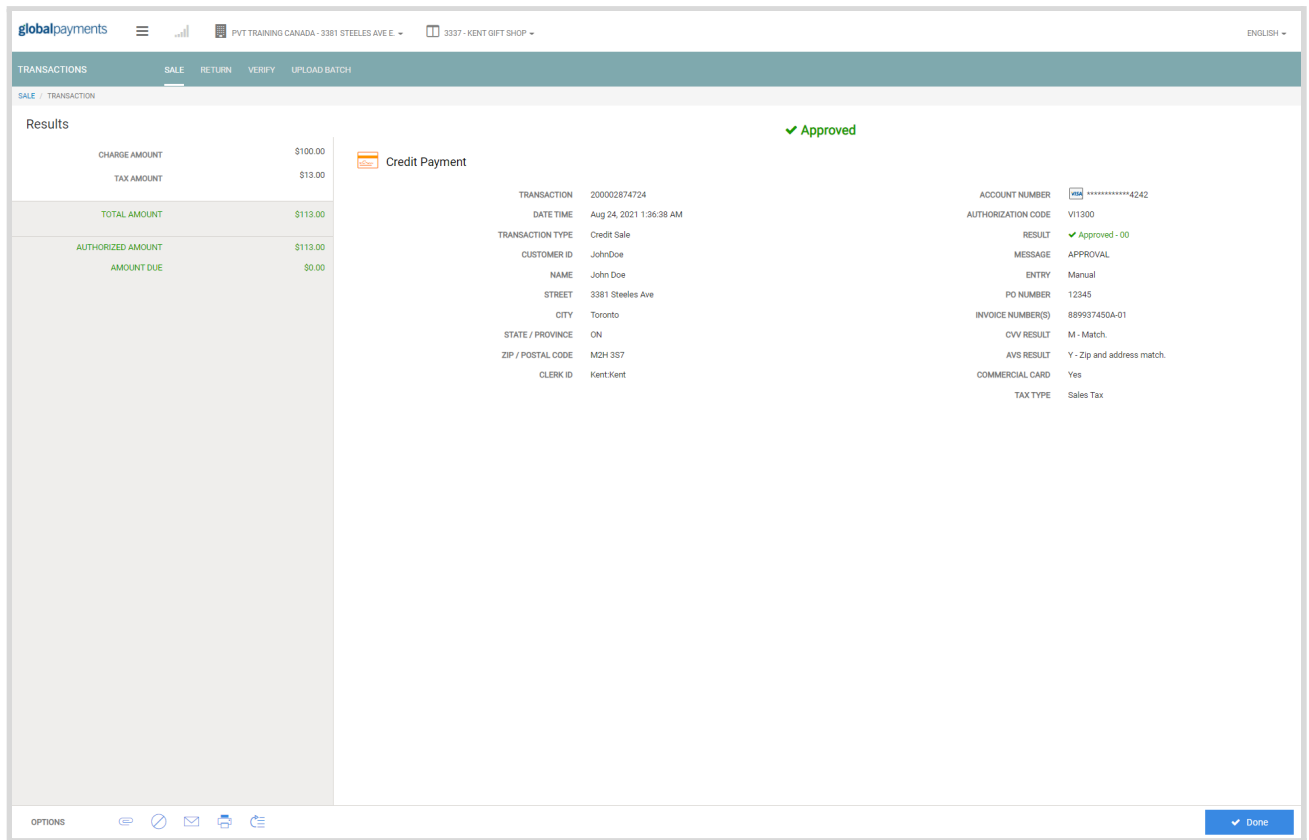
Process a MOTO sale

Use the MOTO (Mail Order Telephone Order) sale to process a mail / phone order.

The screenshot shows the Portico Virtual Terminal interface. At the top, there are navigation tabs: SALE, RETURN, VERIFY, and UPLOAD BATCH. The main area is titled "Credit Payment" and shows "AMOUNT DUE \$0.00". A "MOTO" option is selected and highlighted with a green box. Below this, there are several input fields: "CARD NUMBER *", "EXP DATE *", "ZIP / POSTAL CODE *", "CUSTOMER ID", "STREET *", "PHONE", and "DESCRIPTION". To the right, there are checkboxes for "AUTH ONLY" and "OFFLINE", and fields for "SECURITY CODE", "SECURITY CODE STATUS", "INVOICE NUMBER(S)", "PO NUMBER", "FIRST NAME", "CITY", "STATE / PROVINCE", and "EMAIL". At the bottom, there are "Clear All" and "Process" buttons, and a checkbox for "ALLOW DUPLICATE". On the left side, there is a "Clear" button and a list of checkout fields, each with a "\$0.00" value and a "TAX EXEMPT" checkbox.

1. To process a sale, click **Transactions > Sale** on the main menu, then click **MOTO** (selected by default).
2. Enter an amount in the **Charge Amount** field, located in the checkout section on the left window of the screen.
3. Optionally, you can also enter additional charges in the remaining Checkout fields (if applicable).
4. To process an authorization for a sale that should not include tax, check **Tax Exempt** (if applicable).
5. Enter the transaction information in the remaining fields on the Card Payment section of the screen. The fields displayed may vary depending on the merchant setup. Required fields are marked with an asterisk (*).
6. Optional: To process an authorization for the same card and amount, check **Allow Duplicate**. Without this indication, the current transaction will be rejected.
7. Optional: To process an authorization for a sale that should not include tax, check **Tax Exempt** (if available).

- Click **Process**. A **Transaction Results** screen is displayed, which looks similar to the one on the next page. It includes the issuer authorization response (for example, Approved), a Transaction ID, the current total amount displayed, and other information.



- Click **Done** to dismiss the transaction results screen.
- At the bottom left of the transaction results screen are icons that allow other actions to be taken from the transaction results screen including:
 - Adding an attachment (see [Attaching a Document](#))
 - Adding a tip (see [Add a Tip](#))
 - Voiding a transaction (see [Process a Credit Card Void](#))
 - Emailing a receipt for this transaction (see [Email a Receipt](#))
 - Printing a receipt for this transaction (see [Print a Receipt](#))

MOTO sale transaction fields

Table 3-1 Credit MOTO sale transaction fields

Field	Description
Charge Amount	Entered amount of the sale.
Tax Amount	Entered amount of the tax.
Tax Exempt	This option allows you to submit a transaction without having sales tax applied to the total.
Tip Amount	Entered amount of the tip (if enabled)
Shipping Fee	Entered amount of the shipping fee (if enabled)
Total Amount	Calculated total payment debited amount, which includes taxes, fees, etc.
Card Number	Card number obtained when the user inputs card data.
Expiration Date	Expiration Date of the card.
Security Code	The three or four digit number on the back or front (American Express) of the credit card used to verify the possession of the card.
Security Code Status	If you are unable to enter the security code, select a reason (Illegible, Not Present).
Postal / Zip Code	The customer's postal/zip code.
Invoice Number(s)	If applicable, enter the customer's invoice number.
PO Number	If applicable, enter the customer's purchase order number.
Customer ID	If applicable, enter the customer's ID.
First Name	Displays the cardholder's first name.
Last Name	Displays the cardholder's last name.
Street	The customer's street address (if provided).
City	Displays the cardholder's city of residence.
Province / State	Displays the cardholder's state of residence.
Phone	Enter the customer's home phone number.
Email	Enter the customer's email address.
Description	Enter a brief description of the product or services that were provided.
Allow Duplicate	This option allows you to submit a transaction with the same card number and amount as a previously entered transaction within the same batch on the same day. If this option is not selected, transactions with the same card number and amount will be declined. If the same card number, but different amount is processed, the transaction is approved.

Credit Card Transaction Results and Receipt Fields

Table 3-2 Credit card transaction results and receipt fields

Field	Description
Merchant Information	Merchant's Name, Street Address, City, Province/State, and Postal/Zip code.
Date and Time	The date and time of the transaction.
Transaction Type	Type of transaction: Credit Sale, Account Verify, etc.
Customer ID	Customer number (if provided)
Transaction Number	Unique transaction identifier.
Name	The customer's name (if provided).
Street	The customer's street address (if provided).
Postal / Zip Code	The customer's Postal / ZIP code (if provided).
Account Number	Last four digits of the card account number.
Card Type	Type of card (Visa, Mastercard, Amex, etc.)
Entry Method	Manual-Keyed
Authorization Code	Authorization number.
Result	APPROVED, DECLINED, PARTIALLY APPROVED, VERIFIED, CANCELED
Clerk ID	The user ID of the clerk who processed the transaction.
Subtotal	The amount of the sale.
Tax Amount	Sales tax (if provided).
Tip Amount	The amount of any tip added by the customer.
Shipping Amount	Any shipping cost added to the sale.
Convenience Amount	A fee applied to sale amount (not supported in Canada)
Total Amount	The entire amount of the sale.
Invoice Number	Customer invoice number (if provided).
PO Number	Customer purchase order number (if provided).
Commercial Card	Indicates if this is a commercial purchasing card.
Tax Type	Indicates the type of tax applied (if applicable).
CV Result	Indicates the result of the card verification.
AVS Result	Indicates the result of the address verification.

Card security code information

Visa, Mastercard, American Express and Discover use the card verification code to try to reduce fraud in Card-Not-Present transactions. This is used to verify that the person using the card has physical possession of the credit card.

Table 3-3 Card security code information

Security Code Type	Description
VISA CVV2	The CVV2 (Card Verification Value) consists of the last three (3) digits after the credit card number on the back of the card in the signature area.
Mastercard CVC2	The CVC2 (Card Validation Code) consists of the last three (3) digits after the credit card number on the back of the card in the signature area.
Discover CID	The CID (Card Identification) consists of the last three (3) digits after the credit card number on the back of the card in the signature area.
American Express CID	The American Express CID (Card Identification) consists for the four (4) digits printed on the front of the card, located above and to the right of the embossed credit card number.

Process a credit card using a Corporate Purchasing Card (CPC)

A CPC credit transaction is similar to a non-CPC transaction. The main difference is that certain fields are required on a CPC transaction that are optional on a non-CPC transaction.

***To process CPC / Level 2 Enhanced Data transactions, qualified merchants in eligible Merchant Category Codes may require additional registration with the card brands. Please contact your Global Payments sales representative for more information.**

1. To process a sale, click **Transactions > Sale** on the main menu, then click **MOTO** (it should be selected by default).
2. Enter an amount in the Charge Amount field, located in the Checkout section on the left window of the screen.
3. Optionally, enter additional charges in the remaining Checkout fields (if applicable).
4. To process an authorization for a sale that should not include tax, check **Tax Exempt** (if applicable).
5. Enter the transaction information in the remaining fields on the Card Payment section of the

screen. The fields displayed may vary depending on the merchant setup. Required fields are marked with an asterisk (*).

- Optional: To process an authorization for a sale that should not include tax, check **Tax Exempt** (if available).
- Click **Process**. A CPC transaction requires a PO Number and a Tax Amount (or an indication that the transaction is Tax Exempt). A prompt will appear if either of these fields were not entered prior to selecting the **Process** button.

Commercial Card

Entering or updating the Tax Amount here will not change the Authorized Amount

PO Number

Tax Amount

\$0.00

Tax Exempt

Process

- Click **Process**. Step Result: The transaction result page displays the issuer authorization response (for example, Approved).

Process a credit card authorization

Authorization reserves funds by placing a hold on a credit card. This ensures sufficient funds will be available when the authorization is completed. Use authorization for transactions that will be modified later (for example, adding a tip). This transaction type does not settle automatically.

NOTE: The authorization transaction must be added to a batch prior to making a tip adjustment or a settlement. See [Add to Batch from the Open Authorizations Report](#).

- To process a credit card authorization, click the **Auth Only** checkbox on the credit sale screen.
- Enter Card Data and the transaction information in the remaining fields. The fields displayed may vary depending on the merchant setup.
- To process an authorization for the same card and amount, check the **Allow Duplicate** checkbox at the bottom of the screen without this indication, the current transaction would be rejected.

The screenshot displays the Global Payments Virtual Terminal interface. At the top, the header includes the 'globalpayments' logo, a menu icon, and the store name 'PVT TRAINING CANADA - 3381 STEELES AVE. E.' with a location pin icon and '3337 - KENT GIFT SHOP'. The language is set to 'ENGLISH'. Below the header, there are navigation tabs: 'TRANSACTIONS', 'SALE', 'RETURN', 'VERIFY', and 'UPLOAD BATCH'. The main content area is divided into two sections:

- Checkout:** This section on the left contains a 'Clear' button, a 'CHARGE AMOUNT *' field with a value of '\$0.00', a 'TAX AMOUNT' field with a value of '\$0.00', and a 'TAX EXEMPT' checkbox. Below these fields is a 'TOTAL:' label with a value of '\$0.00'.
- Credit Payment:** This section on the right is titled 'Credit Payment' and shows 'AMOUNT DUE \$0.00'. It features a 'MOTO' button. The form includes several input fields: 'CARD NUMBER *', 'SECURITY CODE *', 'INVOICE NUMBER(S)' (with an 'Add Invoice Number' link), 'CUSTOMER ID', 'STREET *', 'PHONE', 'DESCRIPTION', 'AUTH ONLY' checkbox, 'SECURITY CODE STATUS *' (with a dropdown menu), 'PD NUMBER', 'FIRST NAME', 'CITY', 'EMAIL', 'EXP DATE *' (with a dropdown), 'LAST NAME', 'STATE / PROVINCE', and 'ZIP / POSTAL CODE *'. There are also 'Clear All', 'ALLOW DUPLICATE' checkbox, and 'Process' buttons.

4. To process an authorization for a sale that should not include tax, check **Tax Exempt** (if available).
5. Click **Process**.
6. For all transactions, the transaction result page displays the issuer authorization response (For example: Approved) with the current total amount displayed.
7. To prepare to add a tip to the authorized amount, click the **Print Preview** icon on the top right-hand corner of the transaction result page. Step Result: The receipt print preview is displayed.
8. Click **Print**. Take the printed receipt to the customer to add a tip, total, and sign.

Process a credit card return

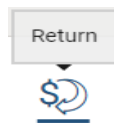
Use a return to refund money to the customer's credit card for returned items from a previously closed batch.

NOTE: The original transaction must be located before it can be returned. See [Find Transactions \(Transaction Detail Listing\)](#) for more information on locating transactions.

1. To process a return, click **Return** on the main menu, then select the **Credit** tab on the Return Transaction screen.
2. Enter card data and type the transaction information in the remaining fields. The fields displayed may vary depending on the merchant setup.
3. To process a return for the same card and amount, check **Allow Duplicate**. Without this indication, the current transaction would be rejected.
4. Click **Process**. Step Result: The transaction result page displays the issuer authorization response (for example, Approved).

Alternatively, you can also process a return from the transaction details page accessed by the [Find Transactions \(Transaction Detail Listing\)](#) report. To use this method, following these steps:

1. Click **Reports > Find Transactions** from the main menu.
2. Enter the Transaction ID (if known) or the date range of the transaction, then click the **Search** button.
3. Locate the transaction for which you want to do a return and click the **Transaction Number** link.



4. Click the **Return** transaction icon on the transaction results screen. Step Result: The return prompt is displayed.

A screenshot of a "Return" form. The form has a title "Return" at the top. Below the title, there are two input fields. The first is labeled "Card Number" and contains the text "*****1111". The second is labeled "Return Amount *" and contains the text "1.00". At the bottom right of the form, there are two buttons: "Cancel" and "Process".


Return	
Card Number	*****1111
Return Amount *	1.00
Cancel Process	

5. The total amount of the transaction will appear in the return prompt by default. You can do a return for either the full amount or for less than the full amount (for example, a partial return). If the return is a partial return, enter the amount in the Return Amount field.
6. Click **Process**. Step Result: A confirmation page is displayed.
7. Click **Yes**. Step Result: The transaction result page displays the issuer authorization response (for example, Approved).

Process a credit card void


Use void to cancel a credit card transaction stored in an open batch. Voiding a transaction removes it from the batch and updates the settlement amount to \$0.00. The void icon will not appear if the transaction is in a closed batch. In Virtual Terminal – Portico, this can be done either on the transaction results screen that appears immediately upon processing a credit card transaction or via the Find Transactions report.

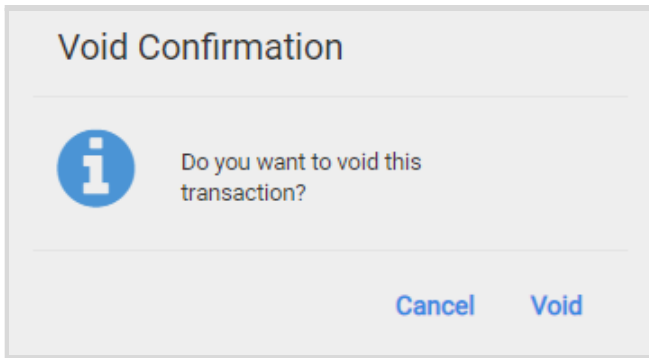
Void from the Transaction Results Screen

1. To perform a void from the transaction results screen, click the **Void**  icon.
2. Click **Void** on the Void Confirmation prompt. Step Result: The transaction results screen appears, displaying the issuer authorization response. A successful void displays Canceled.

Void from the find transactions report

1. When the transaction to be voided is located on the Find Transactions report, click on the **Transaction Number** link. This will display the transaction results screen for the selected transaction.

2. Click the **Void**  icon from the transaction results screen.
3. Click **Process** on the confirmation prompt. The transaction result page displays the issuer authorization response. A successful void displays Canceled.



Verify a credit card account

The credit account verify feature allows you to determine if a customer's card is in good standing prior to processing a sale without affecting the cardholder's account. The Account Verify feature:

- Does not protect you from chargebacks.
- Is not an authorization and is not meant to provide information to you or the issuer about the amount or type of the transaction.

An authorization is still required and supersedes the verification response for the same transaction. The account verify feature can be used for AMEX as well for validating the customer's Postal / Zip Code.

1. To process an account verify transaction, click **Transactions > Verify** on the main menu.
2. *Enter Card Data.* If you enter the number manually, please ensure you also enter the expiration date, cardholder name, and Postal/Zip Code (required for American Express).
3. Type the credit card and transaction information into the fields.
4. Click **Process**. Step Result: The transaction result page displays the issuer authorization response (for example, Verified).

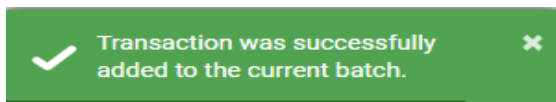
Add a transaction to a batch

When you process an authorization / pre-authorization, you need to add it to a batch for it to settle and be funded. You can add an authorization to a batch from either the transaction results screen or from the Find Transactions report.

Add to batch from the transaction results Screen



1. After processing an auth-only transaction, click on the **Add to Batch** icon at the bottom of the transaction results screen.
2. Click **Process** on the Add to Batch Confirmation prompt. Step Result: The transaction results screen appears and you will get a confirmation that the transaction was added to the batch.



3. If you need to [Add a Tip](#), you can do that from the transaction details page once the transaction is added to a batch.

Add to batch from the find transactions report

You can add a transaction to a batch from the transaction details page. The original transaction must be located before it can be added to a batch. See Find transactions for more information on locating transactions.

1. When the transaction that is to be added to a batch is located on the Find Transactions report, click on the **Transaction Number** link. This will display the transaction results screen for the selected transaction.



2. To add an authorization to a batch, click the **Add to Batch** icon on the transaction details page. Step Result: The Add to Batch dialog is displayed.
3. Click **OK**. If you need to [Add a Tip](#), you can do that from the transaction details page once the transaction is added to a batch.

Add a tip

Use Tip Adjustment to add a tip to a previously processed credit card payment.

NOTE: If a transaction is partially approved, a tip cannot be added or changed.

Authorizations must be added to the batch to enable Tip Adjustment. You need to have the transaction number to add a tip to a payment. Get the transaction number from the receipt printout or use the Current Batch Details report to find the transaction number.

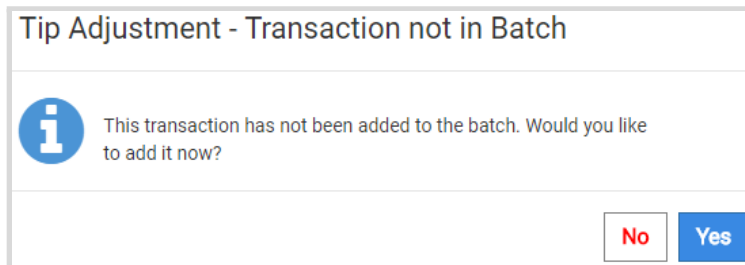
Add a tip from the transaction results screen

Use the transaction result screen to add a tip.

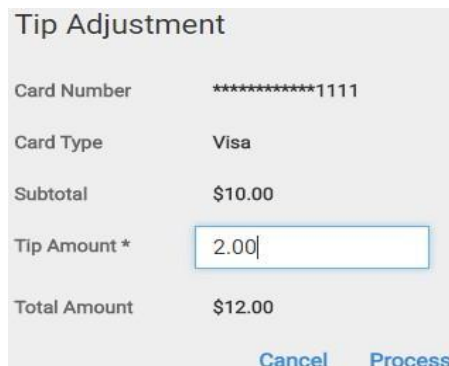
1. To add a tip from the transaction result screen of a just-processing transaction, click the **Tip Adjustment** icon.



NOTE: If the transaction has not been added to a batch, a message displays asking if you would like to add it. Click **Yes** to add the transaction to a batch.



2. Enter the amount of the tip in the Tip Amount field.



Tip Adjustment	
Card Number	*****1111
Card Type	Visa
Subtotal	\$10.00
Tip Amount *	<input type="text" value="2.00"/>
Total Amount	\$12.00
Cancel Process	

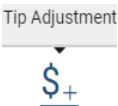
3. Click **Process**.

4. On the confirmation prompt asking if you want to proceed with the tip adjustment, click **Yes**. Step Result: The transaction result screen displays the issuer response (for example, Approved) with the subtotal, tip, and total amount.

Add a tip from the find transactions screen

Alternatively, you can add a tip to a transaction from the transaction details page accessed by the [Find Transactions \(Transaction Detail Listing\)](#) report. The original transaction must be located before it can be added to a batch. Locate the transaction that you want to do a tip adjustment on.

1. Click the **Transaction Number** link of the target transaction to display the transaction results screen.

2. Click the tip adjustment  icon.

NOTE: If the transaction has not been added to a batch, a message displays asking if you would like to add it. Click **Yes** to add the transaction to a batch.

Tip Adjustment - Transaction not in Batch



This transaction has not been added to the batch. Would you like to add it now?

No

Yes

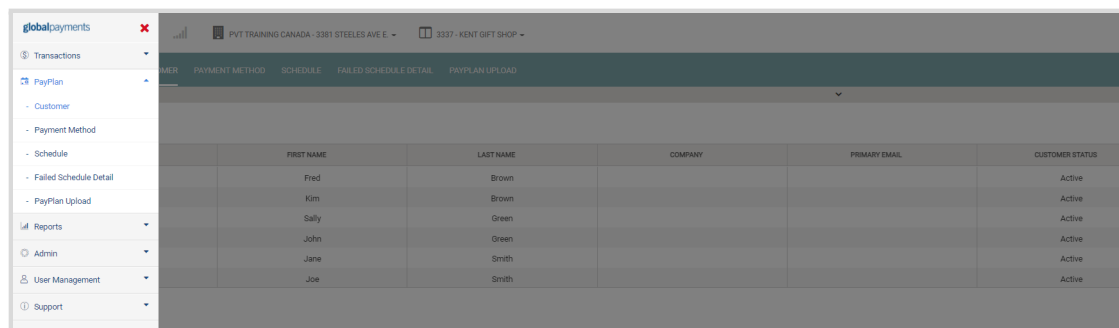
Tip Adjustment	
Card Number	*****1111
Card Type	Visa
Subtotal	\$10.00
Tip Amount *	<input type="text" value="2.00"/>
Total Amount	\$12.00
Cancel Process	

3. Enter the amount of the tip in the Tip Amount field.
4. Click **Process**.
5. On the confirmation prompt asking if you want to proceed with the tip adjustment, click **Yes**. Step Result: The transaction result screen displays the issuer response (for example, Approved) with the subtotal, tip, and total amount.

4– PayPlan transactions

PayPlan is the recurring/subscription billing component of the Virtual Terminal – Portico. It allows users to setup customers, save their credit cards for future use, and to setup recurring billing schedules.

PayPlan is enabled by default. Please note that PayPlan does not allow quotation marks in any text field.



The screenshot shows the Global Payments Virtual Terminal interface. On the left is a navigation menu with options: Transactions, PayPlan (expanded to show Customer, Payment Method, Schedule, Failed Schedule Detail, and PayPlan Upload), Reports, Admin, User Management, and Support. The main area displays a table of PayPlan customers with the following data:


FIRST NAME	LAST NAME	COMPANY	PRIMARY EMAIL	CUSTOMER STATUS
Fred	Brown			Active
Kim	Brown			Active
Sally	Green			Active
John	Green			Active
Jane	Smith			Active
Joe	Smith			Active

5–Customers

Add a customer

Use add customer to register a new PayPlan recurring payment customer.

Merchants within the Healthcare MCCs may only enter a max of eight digits in the Customer ID field.

1. To add a PayPlan customer, click **PayPlan > Customer** on the main menu.
2. Click on the  icon
3. Key in the desired Customer ID, name, address, and contact information into the fields. Required fields are marked with an asterisk (*)."
4. Click **Save**. You will be redirected to the View Customer screen for your new Customer.

The View Customer page displays the information for the new customer and provides options to **Edit Customer**, **Add Payment Method**, and **Add Schedule**.



Field sizes for PayPlan add/edit customer

Table 7-1 Field sizes for PayPlan add/edit customer

Field Name	Maximum Length
Customer ID	50
First Name	24
Last Name	24
Company	50
Title	24
Department	26
Primary Email	100
Secondary Email	100
Address Line 1	100
Address Line 2	50
City	20

Find a customer


Use Find Customer to locate an existing PayPlan recurring payment customer. You can export the search results in a number of file formats.

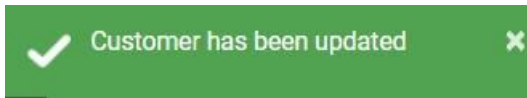
1. To find a PayPlan customer, click **PayPlan > Customer** on the main menu.
2. Type the Customer ID or click  **Show More Options**.
3. Fill in the fields you would like to search by.
4. Click **Search**. A search results list is displayed with customer records matching the search criteria and provides a link to View Transaction History.
5. To export the list, click  icon in the top right-hand corner and select the file format for the export (CSV, PDF).
6. To see details about the customer, click the **Customer ID**.

The View Customer page displays the information for the new customer and provides options to View Payment History, Edit a Customer, Add Payment Method, and Add Schedule.

Edit a Customer

Use Edit Customer to modify the information of an existing PayPlan recurring payment customer. The option to edit a customer is found on the View Customer page. To access that page, follow the following steps to [Find a Customer](#):

1. To edit a PayPlan customer, click the **Edit**  icon from the View Customer page.
2. Type any updates to the name, address, and contact information into the fields.
3. Click **Save**. Step Result: A result message is displayed.




4. The View Customer page displays the updated information for the customer.

Delete a customer

Use the delete option to delete a customer in PayPlan.

The option to delete a customer is reached from the View Customer page. To get to that page, follow the steps to [Find a Customer](#).

1. To delete a PayPlan customer, click the trash can  icon from the View Customer Page.
2. Click **Delete**. A Delete Confirmation message asks if you are sure you want to delete the customer. This cannot be undone.
3. Click **Yes**. A status message is displayed. If the customer has active schedules, you will be informed that deleting the customer will also delete all their payment methods and schedules.

6–Payment methods

Add a payment method

Use Payment Method or View Customer to associate a new payment method to an existing PayPlan customer.

To add a payment method, you need to have the Customer ID number. If you don't know the Customer ID, use [Find a Customer](#).

You are able to add a new payment method from the View Customer page as a part of the find process.

1. To add a payment method to a PayPlan customer, click **PayPlan > Payment Method** on the main menu.
2. Type the **Customer ID**.
3. Click the **Customer ID** that you want to add a Payment Method to.
4. Click **Add Payment Method**.
5. To select a payment type, click **Credit Card**

For credit cards

1. Enter the card data. To make this card the default payment, check the **Preferred Payment Method** box.
2. To autofill the customer's address, click Copy Customer Address or type in the information.
NOTE: Billing ZIP/Postal code is required for AMEX cards.
3. To save the payment without processing an immediate payment, click **Later User Only**.
4. To process an immediate payment, click **Charge Now** and add the payment amount.
5. Click **Save**.
 - If you processed a payment, a transaction result page displays the issuer authorization response (for example: Approved).

- If the AVS or CVV setting is set to decline, you will not be able to save the payment method. If there is an AVS mismatch set to PROMPT, the user will be prompted whether they want to save the card.
- If saved, future one-time transactions will continue to prompt due to AVS mismatch.

NOTE: If the payment method is saved, then attached to a schedule, the AVS action of PROMPT will be ignored during schedule processing.

Field Sizes for PayPlan Add/Edit Credit Card

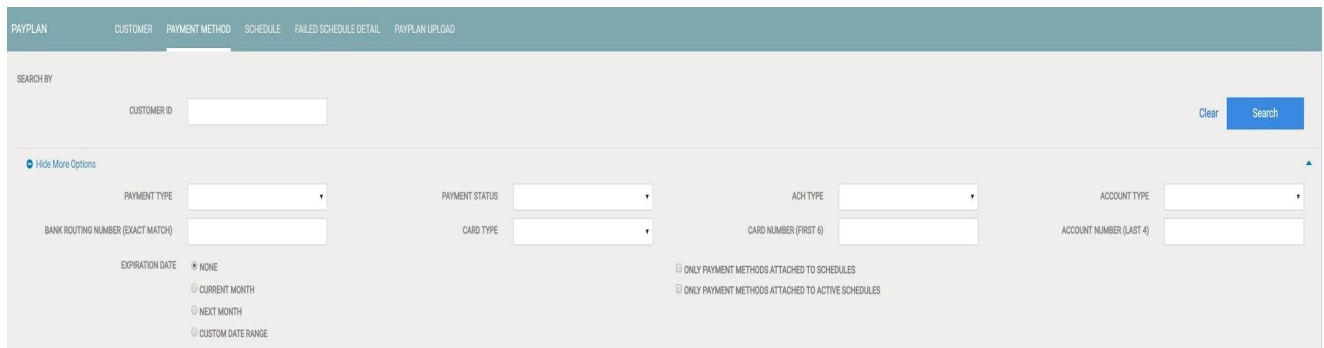
Table 8-1 Field Sizes for PayPlan Add/Edit Credit Card

Field Name	Maximum Length
Card Number	22
Name on Card	50
Address Line 1	100
Address Line 2	50
City	20

Find a payment method

Use Payment Method to locate an existing PayPlan customer's payment method. You can print the search results, export them, or save them in a number of file formats.

1. To find a PayPlan customer's payment method, click **PayPlan > Payment Method** on the main menu.
2. Type the Customer ID or other search criteria, such as the card type, the first six digits of a card number, expiration information, or schedule attachment.




The screenshot shows the 'PAYPLAN' interface with a navigation bar containing 'CUSTOMER', 'PAYMENT METHOD', 'SCHEDULE', 'FAILED SCHEDULE DETAIL', and 'PAYPLAN UPLOAD'. The 'PAYMENT METHOD' tab is active. Below the navigation bar, there is a 'SEARCH BY' section with a 'CUSTOMER ID' input field and 'Clear' and 'Search' buttons. A 'Hide More Options' link is visible. The search criteria section includes: 'PAYMENT TYPE' (dropdown), 'PAYMENT STATUS' (dropdown), 'ACH TYPE' (dropdown), 'ACCOUNT TYPE' (dropdown), 'BANK ROUTING NUMBER (EXACT MATCH)' (input), 'CARD TYPE' (dropdown), 'CARD NUMBER (FIRST 6)' (input), and 'ACCOUNT NUMBER (LAST 4)' (input). Under 'EXPIRATION DATE', there are radio buttons for 'NONE', 'CURRENT MONTH', 'NEXT MONTH', and 'CUSTOM DATE RANGE'. There are also checkboxes for 'ONLY PAYMENT METHODS ATTACHED TO SCHEDULES' and 'ONLY PAYMENT METHODS ATTACHED TO ACTIVE SCHEDULES'.

3. Click **Search**. Result: A search results list is displayed with payment method records matching the search criteria.
4. To view payment schedules that use a payment method, click the **View Schedule** icon to view linked schedules.
5. To export the list, click the **Export** icon in the top right-hand corner and select the file format for the export (CSV, PDF). As window displays with file type selected.
6. Type a name for the file.
7. Select a location.
8. Click **Save**.

Edit a Payment Method

Use Edit Payment Method to edit an existing payment method of an existing PayPlan customer.

The option to edit a payment method is reached from the View Customer page. To get to that page, follow the steps to find a customer.

1. To edit a customer's payment method, open the **View Customer** page.
2. Click the  icon beside the desired payment method.
3. Edit the payment status, expiration date, name on card, or billing address information on the Edit Payment Method page as desired. The editable information fields change depending on the selected payment type.


NOTE: You cannot edit the Card Number, instead you would want to add a new Payment Method then delete the other.

4. Click **Update**. A result message is displayed.

Delete a Payment Method

Use the Delete option to remove a payment method from a PayPlan customer.

The option to delete a payment method is reached from the View Customer page. To get to that page, follow the steps to find a customer.

1. To delete a customer's payment method, open the **View Customer** page.
2. Click the trash can  icon in the row of the desired payment method. A Delete Confirmation message asks if you are sure you want to delete the payment method. This action cannot be undone.
3. Click **Yes**. The payment method is deleted.


NOTE: If the payment method is attached to active schedules, it will not be deleted. Instead, an error message will be displayed.

7–Schedules

Add a scheduled payment

Use schedules to create a new payment schedule for an existing PayPlan customer.

NOTE: Merchants with Healthcare MCCs (see Appendix B for Healthcare MCCs) may only enter a max of eight digits in the Schedule ID and Invoice Number fields.

1. To add a scheduled payment to a PayPlan customer, click **PayPlan > Customer** on the main menu.
2. Type the **Customer ID**. Click **Search**.
3. Click on the **Customer ID**, then click **Add Schedule**.
4. Type a new Schedule ID (it must be a unique, maximum 30 character limit number) and Schedule Name.
5. Select a **Schedule Status** (default is Active).
6. Select a payment method account to use for the schedule.
7. To add a new payment method, click the  icon.
8. Type the payment information, frequency, reprocess attempt number, and notification options. Required fields are marked with an asterisk (*).
9. When the frequency is selected, payment timing and duration options are displayed.
10. The start date must be the current date or later. If the end date option is used, the end date must be greater than the last processing date.
11. Schedules now include optional fields for Invoice Number and Description. The values in these fields are sent in the transaction request on the Next Date Billed.
12. Click **Save**. A result message is displayed (for example, Schedule successfully added).

Field Sizes for PayPlan Add/Edit Schedules

Table 9-1 Field Sizes for PayPlan Add/Edit Schedules

Field Name	Maximum Length
Card Number	22
Schedule ID	40
Schedule Name	40


Schedule Frequency definitions

The frequency is how often to bill the customer. After a schedule processes successfully with an approved transaction, the value in this field is used in logic to determine the date of the next transaction.

Table 9-2 Definitions

Frequency	Billing period
Weekly	Will bill once per week Next transaction date is +7 days Bills 52 times per year
Bi-Weekly	Will bill every two weeks Next transaction date is +14 days Bills 26 times per year
Semi-Monthly	Will bill twice a month, on the First and 15th, or the 15th and Last Day Bills 24 times per year
Monthly	Bills once per month on the date specified in Next Bill Date Bills 12 times per year
Bi-Monthly	Bills once every two months on the date specified in Next Bill Date Bills six times per year
Quarterly	Bills once per quarter (once every three months) on the date specified in Next Bill Date Bills four times per year
Semi-Annually	Bills twice per year, on the anniversary of the start date and +6 months Bills two times per year
Annually	Bills once per year, on the anniversary of the start date

Find a schedule


1. To find a PayPlan customer's payment method, click **PayPlan > Schedule** on the main menu.
2. Type the Schedule ID or other search criteria.
3. Click **Search**. A search results list is displayed with payment schedule records matching the search criteria, which includes a link to view the Transaction History.
4. To export the list, click the  icon in the top right-hand corner and select the file format for the export (CSV or PDF).

NOTE: If you select the CSV file type, any commas in the exported data will be removed and amount fields will be exported with the \$ and decimal (for example, \$1576.32).
5. To view payment schedules details, click the **Schedule ID**. The Edit Payment Schedule page is displayed.

Edit a schedule

Use Edit Payment Schedule to modify the information of an existing PayPlan recurring payment schedule.

NOTE: The option to edit a schedule is reached from the Schedules page. To get to that page, follow the steps to [Find a Schedule](#). You can also reach it from the View Customer page, Scheduled Payments section. To get to that page, follow the steps to [Find a Schedule](#).

1. To edit a payment schedule, from the Schedules page, click the desired **Schedule ID**.
2. From the View Customer page, click the  icon beside the desired payment schedule.

NOTE: The Edit Payment Schedule page also has a link to view payment history. Note that a void of a scheduled payment does not adjust the number of payments remaining on the schedule.

3. Edit any of the available fields (grayed-out fields are not editable).
 - a. If the schedule has not yet started processing, start date is editable. If the schedule has started processing, next bill date is editable.
 - b. If modifying any date field, the new date must be greater than the current date. The end date and cancellation date must also be greater than the next bill date.

- c. The status change date displays the timestamp of the most recent update to the Schedule Status. It is displayed in the local timezone set up for the Device. If it is not correct, please contact Global Payments Support.
 - d. To cancel a schedule immediately, set the Schedule Status to **Inactive**.
 - e. If the duration is assigned to be End Date, the End Date may be updated. It must be greater than the next bill date.
 - f. If the duration is assigned to be a limited number, the number of payments remaining may be updated to any number greater than 0.
 - g. If the duration is assigned to be Ongoing, a Cancellation Date may be set that is greater than the next bill date.
4. Select options for payment notifications to the customer.
 5. Click **Update**. A result message is displayed. If the Next Bill Date was modified, a prompt message asks if it is a one-time or ongoing change.
 6. To verify a processing date change, select the desired option and click **Continue**.
 7. Click **OK**. The Schedule page displays the updated information for the schedule.

EDIT SCHEDULE

Schedule Info

SCHEDULE ID: fredbrown SCHEDULE NAME:

SCHEDULE STATUS: Active

PAYMENT METHOD: MC *5454 DEVICE: 3337 - Kent Gift Shop

Customer Info

CUSTOMER ID: fredbrown
 STATUS: Active
 NAME: Fred Brown
 TITLE: Supervisor
 ADDRESS: Montreal CAN
 LANGUAGE: Français

Payment Amount

SUBTOTAL: \$5.33 TAX AMOUNT: \$0.00 AMOUNT DUE: \$5.33

Schedule Frequency

PAYMENT FREQUENCY: Bi-Monthly START DATE: 04/07/2021

Schedule Duration

DURATION: Ongoing CANCELLATION DATE:

NEXT PROCESSING DATE: 10/07/2021

Schedule Options

EMAIL TRANSACTION RECEIPTS: Never EMAIL ADVANCE NOTICE OF CHARGES: No REPROCESS DECLINED TRANSACTIONS: 0

Additional Transaction Data


INVOICE NUMBER(S): Add Invoice Number PO NUMBER:

DESCRIPTION:


[Cancel](#) [Delete](#) [Save](#)

Delete a Schedule

Use the Delete schedule option to delete an existing PayPlan recurring payment schedule.

1. Look up the schedule you would like to delete.
2. Click the trash  icon beside the desired payment schedule.
3. A confirmation message is displayed asking if you want to delete this schedule.
4. Click **OK** to confirm.


Delete Schedule

 Customer ID **joesmith**
Schedule ID **joesmith**
Schedule Status **Active**

Are you sure you want to delete this schedule?

View agreement

In Virtual Terminal – Portico, there is a pre-built recurring billing agreement that you can **optionally** use to obtain consent from the customer to save their card information and to bill them on a recurring basis.

1. To access the View agreement link, click **PayPlan > Schedule** on the main menu.
2. Type the Schedule ID or other search criteria.
3. Click **Search**. Step Result: A search results list is displayed with payment schedule records matching the search criteria.
4. To view the customer agreement, click the  icon. A disclaimer page is displayed.
5. Click **OK**. The customer agreement is displayed.

View Agreement

PVT Training Canada
3381 Steeles Ave E, Suite 200
Toronto, ON M2H3S7
(416) 123-4567

Payment Authorization Agreement

Schedule ID / Name: joesmith
Customer ID: joesmith
Customer Name: Joe Smith
First Charge will occur on: April 7, 2021
The agreement is in effect until: Cancelled
Method of Payment: MC *5454

I hereby authorize **PVT Training Canada ("Merchant")** to keep my Credit Card information on file for payment. I understand that I will be billed \$11.27 Weekly.

I agree to notify the Merchant if my account information changes for any reason.

This authorization shall remain in effect until I [cancel this agreement](#).

To cancel this agreement, I will contact the Merchant at the address or phone number listed above, or by email at kent.cheung@globalpay.com.

I further authorize Merchant or Merchant's agent to email me receipts or other information related to my recurring transactions with Merchant.

X: _____ Date: _____
(Signature)
Joe Smith

View the failed schedules detail list

Use Failed Schedules Detail to view a list of failed schedules.


1. To view the Failed Schedules Detail list, click **PayPlan > Failed Schedules Detail** on the main menu.
2. Type any combination of search criteria.
NOTE: Leave the fields blank to retrieve a general list of all transactions.
3. Click **Search**. A list of failed schedules meeting the search criteria is displayed.

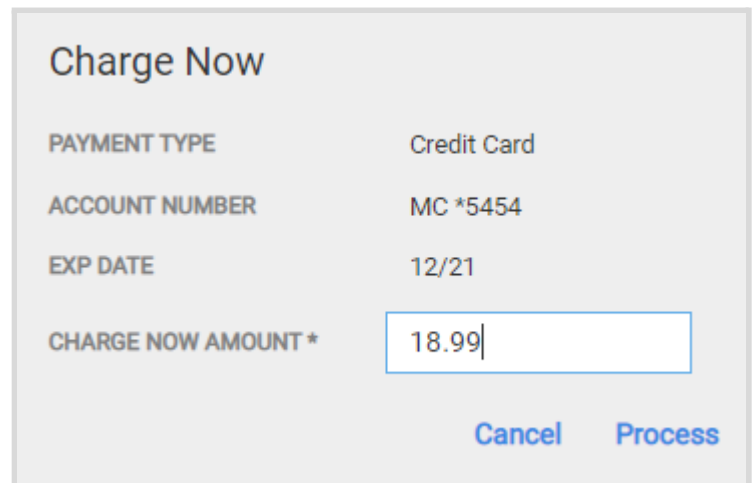
Process a stored payment, one-time charge

You can use a card on file of an existing PayPlan customer to process a one-time charge. This is done from the **View Customer** page (use [Find a Customer](#) to get to View Customer page). Partial approvals for one-time charges are not supported.

You have the option to make an immediate (Charge Now) or a Detailed Charge.

Charge Now

1. To make an immediate charge, click **Charged Now Amount**  icon.
2. Type the amount to be charged in the Charge Now Amount field and click **Process**. The transaction result page displays the issuer authorization response (for example, Approved).




The screenshot shows a 'Charge Now' form with the following fields and values:

PAYMENT TYPE	Credit Card
ACCOUNT NUMBER	MC *5454
EXP DATE	12/21
CHARGE NOW AMOUNT *	<input type="text" value="18.99"/>

At the bottom right of the form, there are two buttons: **Cancel** and **Process**.

Detailed Charge

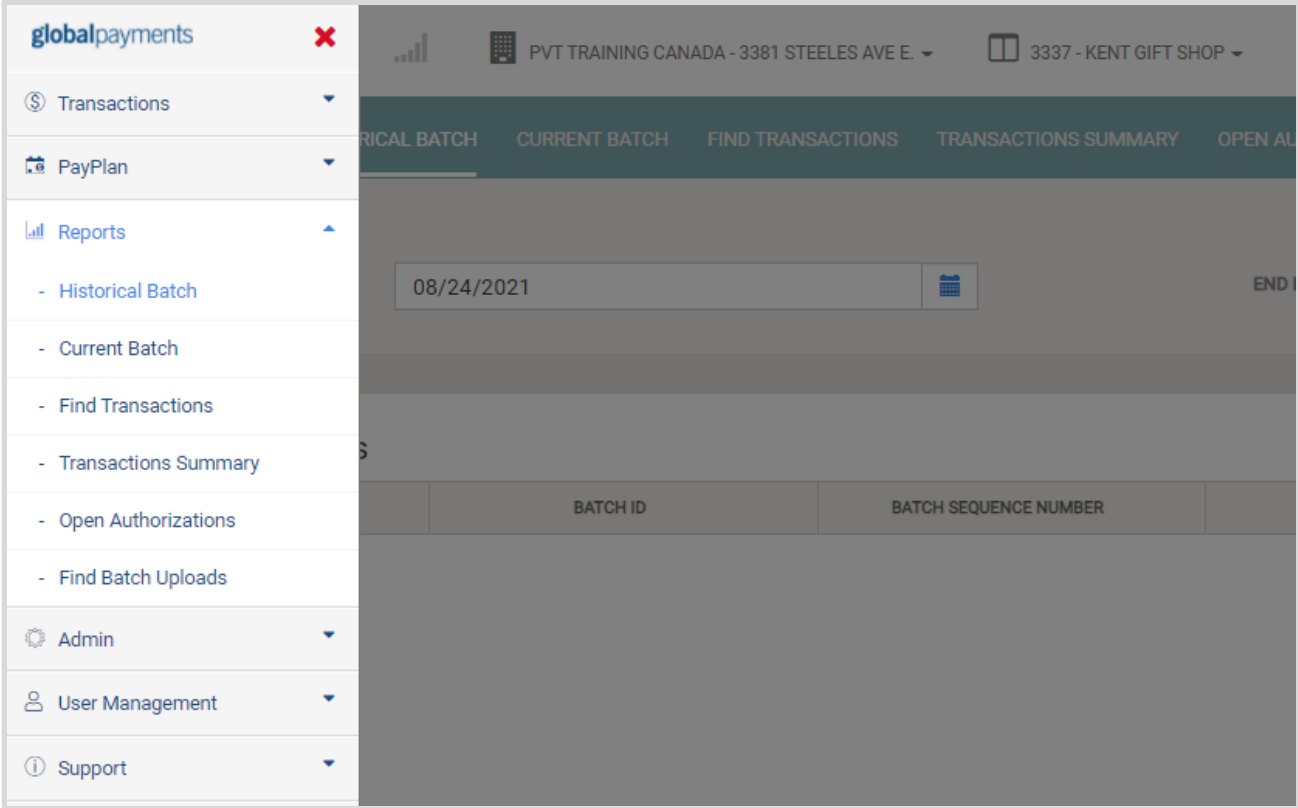
1. To make a detailed charge, click **Detailed Charge**  icon.
2. The One Time Payment page displays.
3. Type the amount in the subtotal field.
4. Optionally, type the invoice number and a description. Credit card stored payments also have the option to enter tax amount and PO Number.
5. Click **Process**. The transaction result page displays the issuer authorization response (for example, Approved).

Card on File One Time Payment

Customer Info	Payment Method Info
CUSTOMER ID fredbrown	CARD NUMBER MC *5454
STATUS Active	EXP DATE 12 / 2021
NAME Fred Brown	NAME ON CARD Fred Brown
TITLE Supervisor	
ADDRESS Montreal CAN	ADDRESS 1
LANGUAGE Français	ADDRESS 2
	STATE / PROVINCE
	ZIP / POSTAL CODE
	CITY Montreal
<hr/>	
SUBTOTAL * \$0.00	TAX AMOUNT \$0.00
	<input type="checkbox"/> TAX EXEMPT
INVOICE NUMBER(S) Add Invoice Number	PO NUMBER
DESCRIPTION	<input type="checkbox"/> AUTH ONLY
Cancel	<input type="checkbox"/> ALLOW DUPLICATE
	Process


8-Reports

Use the reports to see summary and detailed information about current and past batches. You can print the reports, export them, or save them in a number of file formats. Reports can take up to two minutes to generate and print. Do not click Print again or try to close the print dialog, as this can cause errors.



Common reporting functionality

Print

1. To print a report, click the **Print**  button.
2. A print-preview screen will appear where you can select the destination printer, print all or specific pages, the page layout, and other print options.

NOTE: When printing this report, some data may be truncated. However, all data is displayed.

Export

The Global Payments Virtual Terminal – Portico supports report exports in the following formats:

- PDF
- CSV

If exported in CSV, but you would like to view the data in Excel, note that Excel will import the fields with the “General” format. Per Microsoft, the General format converts numeric values to numbers and date values to dates. If you have long numeric strings in invoice, PO number, or Customer ID, Excel will convert these to exponent numbers.

View / hide additional fields


Virtual Terminal – Portico includes an all-new user interface that provides the user with considerably more flexibility in customizing report views.

1. Clicking on the ellipsis (...) in the right-most column of the report listing will display a pop-up showing the fields that are currently hidden from the report grid.
2. To clear this popup, click anywhere outside of it.

Transaction Number	Date Time	Customer ID	First Name	Last Name	Account Number	Card Type	Result	Authorization Code	Authorized Amount	Settlement Amount
9372608	Jul 22, 2017 9:58:41 AM			MC TEST CARD	*****0014		Approved	033464	\$50.03	\$0.00
9372586	Jul 22, 2017 9:58:36 AM				*****6527		Approved	007129	\$3.55	\$0.00
9372370	Jul 22, 2017 9:57:39 AM				*****0014		Approved	033445	\$1.50	\$0.00
9372369	Jul 22, 2017 9:57:39 AM			MC TEST CARD	*****0014		Approved	033444	\$28.01	\$0.00
9372367	Jul 22, 2017 9:57:38 AM				*****6527		Approved	007124	\$28.01	\$0.00

More Details

TRANSACTION	200002204779	ENTRY	Manual	INVOICE NUMBER(S)	12345A
PO NUMBER	PO234958	FIRST NAME	John	LAST NAME	Doe
COMPANY		CLERK ID	Kent	ATTACHMENTS	
SCHEDULE ID		BATCH CLOSE DATE	Jul 20, 2021 11:02:00 PM	DESCRIPTION	Order for: 2 x SKU 123745 1 x SKU 432489

3. To add currently hidden fields to the report grid, click the  as shown below

Order	Card Type	Result	Authorization Code	Authorized Amount	Settlement Amount	
114		Approved	033464	\$50.03	\$0.00	...
527		Approved	007129	\$3.55	\$0.00	...
114		Approved	033445	\$1.50	\$0.00	...
0014		Approved	033444	\$28.01	\$0.00	...
527		Approved	007124	\$28.01	\$0.00	...

4. A column control appears as shown below:

Card Type	Result	Authorization Code	Authorized Amount	Settlement Amount	
	Approved	033464	\$50.03		Columns:
	Approved	007129	\$3.55		<input checked="" type="checkbox"/> Tip Amount
	Approved	033445	\$1.50		<input checked="" type="checkbox"/> Entry
	Approved	033444	\$28.01		<input checked="" type="checkbox"/> Invoice Number(s)
	Approved	007124	\$28.01		<input checked="" type="checkbox"/> PO Number
	Approved	033442	\$1.54		<input checked="" type="checkbox"/> Transaction Type
	Approved	033441	\$50.03		<input checked="" type="checkbox"/> Description
	Approved	033440	\$1.57		<input checked="" type="checkbox"/> Clerk ID
	Approved	033437	\$1.54		<input checked="" type="checkbox"/> Attachments
	Approved	033436	\$1.57		<input checked="" type="checkbox"/> Schedule ID
					<input checked="" type="checkbox"/> Fully Captured
					<input checked="" type="checkbox"/> BuyerEmailAddress

5. Click on the columns that you would like to add to the report grid. Selected columns will show a checkmark. This control acts as a toggle. You can remove a selected column by clicking on it again which will change the checkmark to an x.

6. The additional selected columns now appear in the report grid.

Card Type	Result	Authorization Code	Authorized Amount	Settlement Amount	Entry	Invoice Number(s)	Transaction Type	
	Approved	033464	\$50.03	\$0.00	Swiped		Credit Auth	...
	Approved	007129	\$3.55	\$0.00	Manual		Credit Auth	...
	Approved	033445	\$1.50	\$0.00	Manual		Credit Auth	...
	Approved	033444	\$28.01	\$0.00	Swiped		Credit Auth	...
	Approved	007124	\$28.01	\$0.00	Manual		Credit Auth	...
	Approved	033442	\$1.54	\$0.00	Swiped		Credit Auth	...
	Approved	033441	\$50.03	\$0.00	Swiped		Credit Auth	...
	Approved	033440	\$1.57	\$0.00	Swiped		Credit Auth	...
	Approved	033437	\$1.54	\$0.00	Chip		Credit Auth	...
	Approved	033436	\$1.57	\$0.00	Chip - insert		Credit Auth	...






Batch reporting

Current batch summary










Use the current batch summary report to get general information about your batch in progress. To run the current batch summary report, click **Reports > Current Batch** on the main menu.

Current batch details


Use the current batch details report to get detailed information about your batch in progress. This is accessible from the Current Batch Summary report.

REPORTS											
HISTORICAL BATCH											
CURRENT BATCH											
FIND TRANSACTIONS											
TRANSACTIONS SUMMARY											
OPEN AUTHORIZATIONS											
FIND BATCH UPLOADS											
Current Batch Summary											Show Current Batch Details
BATCH ID	BATCH SEQUENCE NUMBER	ACTIVE TRANSACTION COUNT		ACTIVE TRANSACTION AMOUNT							  
1275369	1	9		\$197.16							
CARD TYPE	CREDIT AMOUNT	CREDIT COUNT	DEBIT AMOUNT	DEBIT COUNT	SALE AMOUNT	SALE COUNT	RETURN AMOUNT	RETURN COUNT	TOTAL AMOUNT	TOTAL COUNT	TIP AMOUNT
	\$48.16	4	\$0.00	0	\$48.16	4	\$0.00	0	\$48.16	4	\$0.00
	\$149.00	5	\$0.00	0	\$153.00	4	(\$4.00)	1	\$149.00	5	\$0.00

The Current Batch Details report is displayed.

REPORTS											
HISTORICAL BATCH											
CURRENT BATCH											
FIND TRANSACTIONS											
TRANSACTIONS SUMMARY											
OPEN AUTHORIZATIONS											
FIND BATCH UPLOADS											
Current Batch Details											Show Current Batch Summary
BATCH ID	BATCH SEQUENCE NUMBER	ACTIVE TRANSACTION COUNT		ACTIVE TRANSACTION AMOUNT							  
1275369	1	9		\$197.16							
TRANSACTION NUMBER	DATE TIME	CUSTOMER ID	TRANSACTION TYPE	CARD TYPE	ACCOUNT NUMBER	SETTLEMENT AMOUNT	AUTHORIZED AMOUNT	TIP AMOUNT	RESULT	AUTHORIZATION CODE	
1056006586	Jan 17, 2020 10:41:32 AM		Credit Sale		*****1111	\$5.00	\$5.00	\$0.00	Approved	356591	...
1055252064	Dec 4, 2019 6:54:42 PM		Credit Sale		*****1111	\$140.00	\$140.00	\$0.00	Approved	494227	...
1055237488	Dec 3, 2019 8:57:35 AM		Credit Sale		*****5454	\$1.00	\$1.00	\$0.00	Approved	637677	...
1055230411	Dec 2, 2019 2:00:45 PM		Credit Sale		*****5454	\$1.00	\$1.00	\$0.00	Approved	836875	...
1055174758	Nov 25, 2019 6:08:55 PM		Credit Return		*****1111	(\$4.00)	(\$4.00)	\$0.00	Approved	206859	...
1055174756	Nov 25, 2019 6:04:02 PM		Credit Sale		*****1111	\$4.00	\$4.00	\$0.00	Approved	920743	...

1. You can return to the Current Batch Summary by clicking the **Show Current Batch Summary** link in the upper-right corner of the screen.
2. The current batch can be closed from either the Current Batch Summary or Current Batch

Details report. To close the current batch, click the **Close Batch**  button. See [Close a Batch](#) for more information.

Historical batch report

Use the historical batch report to find information on previously closed batches.

1. Click **Reports** > **Historical Batch** on the main menu.
2. Enter the Start and End Date search criteria. Click **Search**.
3. Click the **Batch ID** number to see the batch summary for that batch.
4. Click the **Show Batch Details** link in the upper-right portion of the screen to view all of the transactions in that batch.
5. To go back to the Historical Batch Summary for the currently selected batch, click the **Show Batch Summary** link in the upper-right portion of the Historical Batch Details report.

The screenshot shows the 'Batch Details' page in a web application. At the top, there is a navigation bar with tabs: REPORTS, HISTORICAL BATCH, CURRENT BATCH, FIND TRANSACTIONS, TRANSACTIONS SUMMARY, OPEN AUTHORIZATIONS, and FIND BATCH UPLOADS. Below the navigation bar, the page title is 'Batch Details'. The main content area displays the following information:

BATCH ID	BATCH SEQUENCE NUMBER	BATCH CLOSE DATE	ACTIVE TRANSACTION COUNT	ACTIVE TRANSACTION AMOUNT
654884	23	7/28/21 11:01 PM	1	\$11.27

TRANSACTION NUMBER	DATE TIME	CUSTOMER ID	TRANSACTION TYPE	CARD TYPE	ACCOUNT NUMBER	SETTLEMENT AMOUNT	AUTHORIZED AMOUNT	TIP AMOUNT	RESULT	AUTHORIZATION CODE	INVOICE NUMBER(S)	FIRST NAME
20000228594	JUL 28, 2021 5:03:46 AM	joemith	Recurring Payment		*****454	\$11.27	\$11.27	\$0.00	Approved	MC1127		

Transactional reporting

Transactions summary

Use the Find Transactions Summary report to find transactions based on a set of search criteria.

1. Click **Reports** > **Transactions Summary** on the main menu.
2. Change the date criteria to refine the search to a broader timeframe or earlier date range. The End Date cannot be earlier than the Start Date.
3. Optionally, you may further refine the search criteria by clicking on the **Show More Options** link

The screenshot shows the 'Transactions Summary' search interface. At the top, there is a navigation bar with tabs: REPORTS, HISTORICAL BATCH, CURRENT BATCH, FIND TRANSACTIONS, TRANSACTIONS SUMMARY, OPEN AUTHORIZATIONS, and FIND BATCH UPLOADS. Below the navigation bar, the page title is 'SEARCH BY DATE RANGE'. The main content area displays the following search criteria:

START DATE	01/23/2020	END DATE	01/23/2020	Clear	Search
------------	------------	----------	------------	-------	--------

Below the search criteria, there is a link labeled **Show More Options**.

- This will expand the search criteria to include the Batch ID, Batch Sequence Number, and Clerk ID. To hide these additional options, click the **Hide More Options** link.

REPORTS HISTORICAL BATCH CURRENT BATCH FIND TRANSACTIONS TRANSACTIONS SUMMARY OPEN AUTHORIZATIONS FIND BATCH UPLOADS

SEARCH BY DATE RANGE

START DATE 01/23/2020 END DATE 01/23/2020 Clear Search

Hide More Options

BATCH ID BATCH SEQUENCE NUMBER CLERK ID

- After entering the desired search criteria, click the **Search** button.
- A summary of transactions meeting the search criteria is displayed.
- You can view the list of transactions meeting the search criteria by clicking the **Show Transactions** link in the upper-right corner of the Transaction Summary List.
- To go back to the Transaction Summary List, click the **Show Summary** link.

Find transactions (transaction detail listing)

Use the find transactions details report to locate transaction records. Depending on the type of information that you have, you may either key the Transaction Number or narrow your search criteria based on the numerous fields available.

- Click **Reports > Find Transactions**
- Enter the Transaction Number *OR* a Start Date and End Date.
 - If a Transaction Number is entered, the Start and End Dates will become grayed out and will not be a criteria in the search.
 - The Start and End dates will default to the current date. Change the date criteria to refine the search to a broader timeframe or earlier date range.

3. To hide these additional options, click the **Hide More Options** link.
4. After entering the desired search criteria, click the **Search** button.
5. A listing of transactions meeting the search criteria is displayed. To view the transaction results of a specific transaction, click on a **Transaction Number** link located in the left-most column of the transaction listing.

Open authorizations report

Use the open authorizations report to locate authorizations that have not been closed.

1. Click **Reports > Open Authorizations** on the main menu.
2. Enter the Transaction Number or a Start Date and End Date.

3. After entering the desired search criteria, click the **Search** button. A list of open authorizations meeting the search criteria is displayed.
4. To view the transaction results of a specific transaction, click on a **Transaction Number** link located in the left-most column of the transaction listing.

Add to batch from the open authorizations report

One or more open authorization transactions, up to a maximum of 50 transactions, can be added to the current open batch from the open authorizations report.

REPORTS														
HISTORICAL BATCH CURRENT BATCH FIND TRANSACTIONS TRANSACTIONS SUMMARY OPEN AUTHORIZATIONS CHECK DETAILS HMS DETAILS FRAUD DECLINE DETAILS FIND BATCH UPLOADS														
Transaction List														
Transactions Selected: 0											Add to Batch			
TRANSACTION NUMBER	DATE TIME	CUSTOMER ID	FIRST NAME	LAST NAME	ACCOUNT NUMBER	CARD TYPE	RESULT	AUTHORIZATION CODE	AUTHORIZED AMOUNT	SETTLEMENT AMOUNT				
<input checked="" type="checkbox"/>	2224446441	Jan 21, 2020 11:40:46 AM			*****1005		Approved	007465	\$10.00	\$0.00	...			
<input checked="" type="checkbox"/>	222449576	Jan 21, 2020 11:14:49 AM			*****1005		Approved	007458	\$10.00	\$0.00	...			
<input checked="" type="checkbox"/>	2224383506	Jan 21, 2020 7:11:57 AM		Amex	*****9128		Approved	007434	\$12.03	\$0.00	...			

- To add Open authorization transactions to the current open batch, click on the **checkmark** immediately to the left of the Transaction Numbers that you want to add to the current open batch. You may select up to a maximum of 50 transactions simultaneously to add to the batch.

Transaction List															
Transactions Selected 12													Add to Batch	Print	Export
Transaction Number	Date Time	Customer ID	First Name	Last Name	Account Number	Card Type	Result	Authorization Code	Authorized Amount	Settlement Amount					
<input checked="" type="checkbox"/>	9372880	Jul 22, 2017 12:47:42 PM		VI TEST CREDIT	*****0016		Approved	58969A	\$24.01	\$0.00	...				
<input checked="" type="checkbox"/>	9372610	Jul 22, 2017 9:58:41 AM		MC TEST CARD	*****0014		Approved	033465	\$50.03	\$0.00	...				
<input checked="" type="checkbox"/>	9372608	Jul 22, 2017 9:58:41 AM		MC TEST CARD	*****0014		Approved	033464	\$50.03	\$0.00	...				
<input checked="" type="checkbox"/>	9372586	Jul 22, 2017 9:58:36 AM			*****6527		Approved	007129	\$3.55	\$0.00	...				
<input checked="" type="checkbox"/>	9372370	Jul 22, 2017 9:57:39 AM			*****0014		Approved	033445	\$1.50	\$0.00	...				
<input checked="" type="checkbox"/>	9372369	Jul 22, 2017 9:57:39 AM		MC TEST CARD	*****0014		Approved	033444	\$28.01	\$0.00	...				
<input checked="" type="checkbox"/>	9372367	Jul 22, 2017 9:57:38 AM			*****6527		Approved	007124	\$28.01	\$0.00	...				
<input checked="" type="checkbox"/>	9372364	Jul 22, 2017 9:57:37 AM			*****0467		Approved	033442	\$1.54	\$0.00	...				
<input checked="" type="checkbox"/>	9372361	Jul 22, 2017 9:57:36 AM			*****0467		Approved	033441	\$50.03	\$0.00	...				
<input checked="" type="checkbox"/>	9372360	Jul 22, 2017 9:57:35 AM		MC TEST CARD	*****0014		Approved	033440	\$1.57	\$0.00	...				
<input checked="" type="checkbox"/>	9372347	Jul 22, 2017 9:57:32 AM		MC TEST CARD	*****0014		Approved	033437	\$1.54	\$0.00	...				
<input checked="" type="checkbox"/>	9372345	Jul 22, 2017 9:57:31 AM		MC TEST CARD	*****0014		Approved	033436	\$1.57	\$0.00	...				

- After selecting the transactions that you would like to be added to the batch, click the **Add to Batch** button. A confirmation prompt will appear stating the number of transactions that will be added to the batch.
- Click **OK** to add the selected transactions to the batch. The selected transactions will be added to the batch and will be removed from the Open Authorizations report.

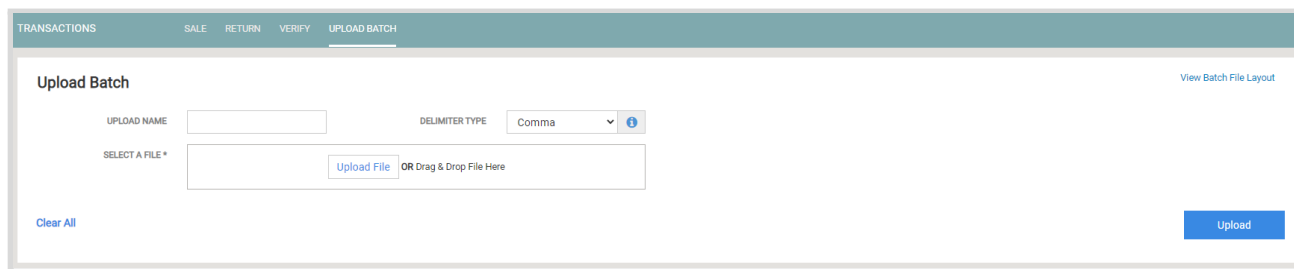
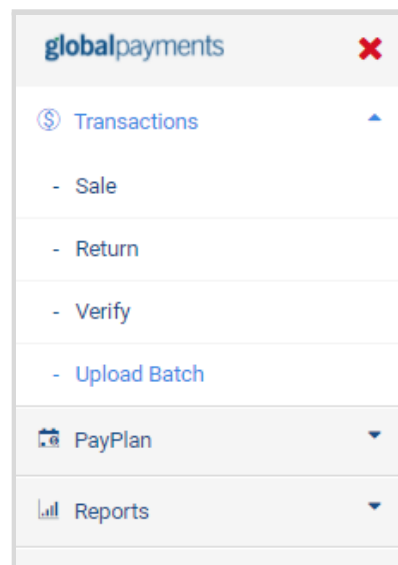
9–Uploads

Upload batch

This function is used to upload a file of transactions. Follow these steps to “upload batch”:

1. Navigate to **Transactions > Upload Batch**.
2. Fill in the upload name.
3. Click **Delimiter Type**.
4. Click **Upload File** or **Drag & Drop File** to be processed.
5. Click **Upload**.

NOTE: Click the **View Batch File Layout** link in the upper right corner to open the details of how the file has to be formatted to properly upload.



Reports find batch uploads

This function is used to view submitted batch upload details. Follow these steps:

1. Navigate to **Menu > Reports > Find Batch Uploads**.
2. Select the Date range you would like displayed, then click **Search**.


This will display Batch Upload List that contains details of batches that have been uploaded, click **Upload ID** for additional details.

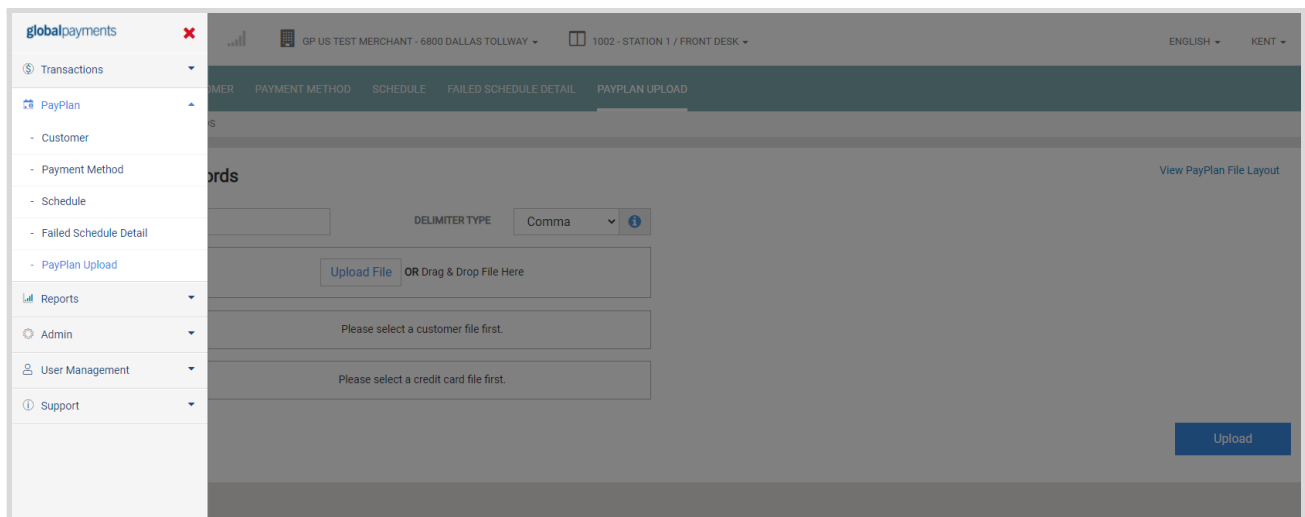
PayPlan upload

This function is used to upload new data into PayPlan, this tool is intended for importing customers, credit cards, and schedules. This cannot be used to edit existing records.

- Customer records
- Customer records + credit card records at same time
- Customer records + credit card records + schedule records at same time

NOTE: You cannot upload credit card records or schedule records without uploading the customer records together.

1. Navigate to **Menu > PayPlan > PayPlan Upload**.
2. Click on the  icon.
3. Key in upload name.
4. Click **Delimiter Type**.
5. Click **Upload File** or **Drag & Drop Files**.
6. Click **Upload**.



NOTE: Click the **View PayPlan File Layout** link in the upper right corner to open the details of how the files have to be formatted to properly upload.

PayPlan upload list

Used to Report on PayPlan Upload details.

1. Navigate to **Menu > PayPlan > PayPlan Upload**.
2. Select the date range
3. Optional: Click **Show More Options** to search by upload name or upload status.
4. Click **Search**. This will display PayPlan uploads.


UPLOAD ID	DATE TIME	STATUS	STATUS NOTE	UPLOAD NAME	FILE COUNT	TRANSACTION COUNT
2012	Aug 23, 2021 5:15:00 PM	COMPLETE	All records processed.	test5	2	2
2010	Aug 23, 2021 5:10:51 PM	COMPLETE	All records processed.	test4	2	2
2008	Aug 23, 2021 5:09:02 PM	COMPLETE	All records processed.	test3	2	2
1996	Aug 23, 2021 3:10:40 PM	REJECTED	Errors found during customer file parsing, see error details.	TESTT	2	0
1995	Aug 23, 2021 3:09:00 PM	REJECTED	Errors found during customer file parsing, see error details.	test2	2	0
1994	Aug 23, 2021 3:07:30 PM	REJECTED	Errors found during customer file parsing, see error details.	sample customer	2	0
1992	Aug 23, 2021 2:58:19 PM	COMPLETE	All records processed.	customer n cards	2	2

10-Administrative tasks

Close a batch

If your account does not have Auto-Close function turned on, you can use **Close Batch** to close the current open batch. We recommend you to close your batch at least once per day.

Open Batch Details

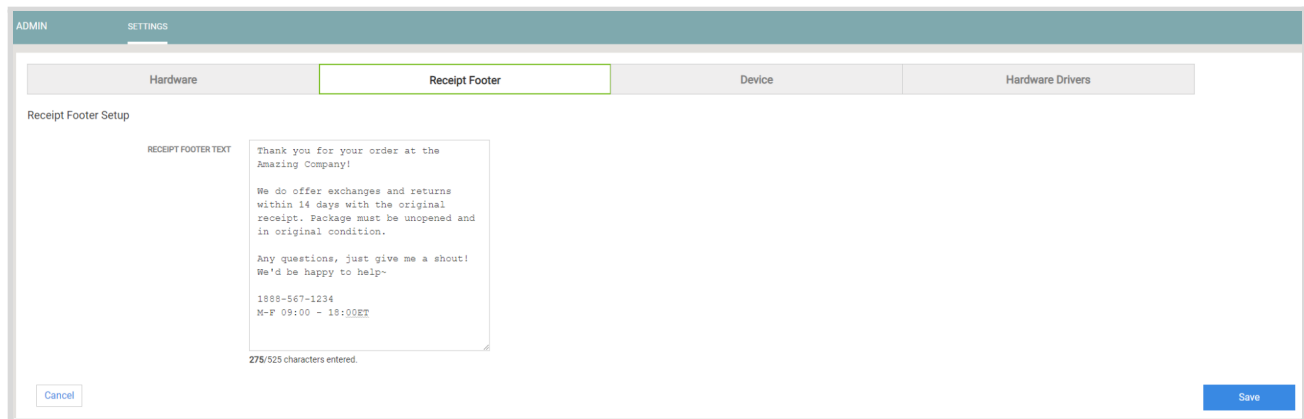
 Batch ID **661397**
Batch Sequence Number **29**
Active Transaction Count **2**
Active Transaction Amount **\$898.87**

Are you sure you want to close this batch?

Add or edit the receipt footer

The receipt footer is a message that is printed at the bottom of receipts.

1. To add or edit the receipt footer, click **Admin > Settings** from the main menu
2. Click the **Receipt Footer** tab.
3. Type the new message or modify the existing message in the text field. The receipt footer message may contain up to 525 characters.



The screenshot shows the 'ADMIN' interface with the 'SETTINGS' tab selected. The 'Receipt Footer' tab is active, highlighted with a green border. Below the tabs, the 'Receipt Footer Setup' section contains a text area labeled 'RECEIPT FOOTER TEXT'. The text area contains the following text: 'Thank you for your order at the Amazing Company!', 'We do offer exchanges and returns within 14 days with the original receipt. Package must be unopened and in original condition.', 'Any questions, just give me a shout! We'd be happy to help-', '1888-567-1234', and 'M-F 09:00 - 18:00ET'. Below the text area, it indicates '276/525 characters entered'. There are 'Cancel' and 'Save' buttons at the bottom of the form.

4. Click **Save**.


Name a terminal device


Use the Device tab in Settings to (optionally) name your devices (if you have more than one).

1. To name a terminal device, click **Admin > Settings** from the main menu.
2. Click the **Device** tab, then click a **Terminal Device Number**.
3. In the Device Name field, enter a name for the device. Device Names can contain up to 100 characters.
4. Click **Save**.




Create New User

The merchant administrator has the ability to create new users and assign specific roles to them.


1. To create a new user, click **User Management > Users** from the main menu.
2. Click this icon to load the add user page 
3. Enter the user's information in the appropriate fields. The following are required:
 - a. Username (must be email address)
 - b. First name
 - c. Last name
 - d. Display name
4. On the right side of the screen under **Merchants and Roles** search or scroll to select the merchant and Role Name to assign to the user you are creating.

Merchants and Roles * 


Showing 12 of 12 available roles Assign 0 selected role(s)

<input type="checkbox"/>	MERCHANT NAME <small>↔1</small>	MERCHANT NUMBER	ROLE NAME <small>↔2</small>	ACTIONS
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input checked="" type="checkbox"/>	Global Payments VT	666611122019	MerchantClerkUser	
<input checked="" type="checkbox"/>	Global Payments VT	666611122019	MerchantMgrUser	
<input checked="" type="checkbox"/>	Global Payments VT	666611122019	MerchantReportingTrxnUser	

1 - 12 of 12 items

5. Click this Icon  to add the merchant and Role to the user
6. Assigned Merchant and Role will display in the box below

Showing 1 of 1 roles assigned Unassign 0 selected role(s)

<input type="checkbox"/>	MERCHANT NAME <small>↔1</small>	MERCHANT NUMBER	ROLE NAME <small>↔2</small>	ACTIONS
<input checked="" type="checkbox"/>	Global Payments VT	666611122019	MerchantAdmin	

1 - 1 of 1 items

7. Select Default Merchant and Default Device from the dropdown, this device is what will load by default when the user logs in.


Defaults ⓘ

DEFAULT MERCHANT * Global Payments VT - 666611122019 ▼

DEFAULT DEVICE * 696 ▼

8. Optional: Select **Allow Manage Users** to allow for the user to have access to User Management
9. Click **Save**.

User Registration

 An email has been sent to test@test.com so they can complete their setup.

OK


Permissions by role


Table 14-1 Permission by Role Chart

Permitted Action	Clerk	Manager	Reporting User	Reporting/ Trxn User	Admin
Sale	X	X			X
Return		X		X	X
Offline Sale	X	X			X
Account Verify	X	X			X
Void		X		X	X
Current Batch	X	X	X	X	X
Add to Batch	X	X			X
Adjustment	X	X			X
Authorization	X	X			X
Offline Authorization	X	X			X
Close Batch		X	X	X	X
Historical Batch		X	X	X	X
Find Transactions		X	X	X	X
Receipt Template		X			X
Device Name		X			X
PayPlan View	X	X	X	X	X
PlayPlan Modify	X	X		X	X
PayPlan Delete		X			X
PayPlan One-Time Charge	X	X		X	X

Add custom roles

Virtual Terminal allows for administrative users to create custom roles, with permissions of their choosing.

1. Under User Management, click **Roles** from the Virtual Terminal menu
2. Click the  icon to create a new custom role
3. Key in the new Role Name

Select merchant name or merchant number(s) for this role and click 

4. Select the desired permission(s)
5. Click **Save**
6. The Custom Role is now available to be selected on user management screens.

Add New Role

Role Details

ROLE NAME *

Merchants *

Showing 2 of 2 available merchants Assign 0 selected merchant(s)

MERCHANT NAME →	MERCHANT NUMBER →	ACTIONS
<input type="text"/>	<input type="text"/>	
Global Payments VT	666611122019	
PVT Training Canada	84743655704	

1 - 2 of 2 items

0 merchants assigned

MERCHANT NAME →	MERCHANT NUMBER →	ACTIONS
-----------------	-------------------	---------

Clear

Permissions *

Showing 25 of 41 available permissions Assign 0 selected permission(s)

PERMISSION NAME →	ACTIONS
<input type="text"/>	
GatewayAccountVerify	
GatewayAddtoBatch	
GatewayAdjustment	


1 - 25 of 41 items

0 permissions assigned

PERMISSION NAME →	ACTIONS
-------------------	---------

Save

Edit custom roles

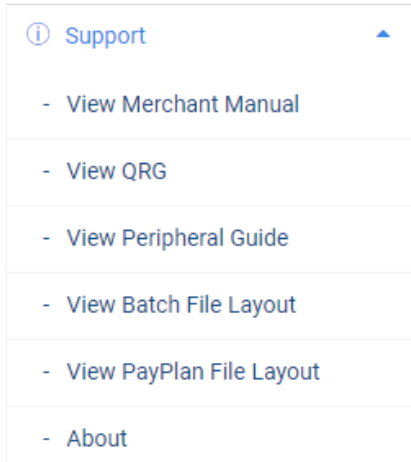
1. Under User Management, click **Roles** from the Virtual Terminal menu.
2. Click Search to locate Roles
3. Select  icon from Actions next to Role Name
4. Edit Role Name, Merchants assigned, or permissions assigned
5. Click **Save**

11-Support

Self-help resources

Before reaching out to our support team, you can:

- Access various documentation directly from the Virtual Terminal – Portico menu > **Support** section.



Contact support team

If you require further assistance, please contact our support team. We are happy to help!

- **Phone:** +1 (888)-682-3309
- **Hours:** 24/7

Appendices

This Appendix contains the following:

Appendix A: Issuer decline codes

Table A-1 Issue decline codes

Brand	Code	Response
Any	02	CALL
Any	03	TERM ID ERROR
Any	04	DO NOT HONOR DUE TO AVS/CVV SETTINGS
Any	05	DECLINE
Amex	06	ERROR
Any	12	INVALID TRANS
Any	13	AMOUNT ERROR
Any	14	CARD NO. ERROR
Any	15	NO SUCH ISSUER
Visa, Disc	19	RE ENTER
Visa, MC, Disc	41	HOLD-CALL
Visa, MC	43	HOLD-CALL
Visa, Amex, Disc	44	HOLD-CALL
Any	51	DECLINE
Visa	52	NO CHECK ACCOUNT
Visa, Disc	53	NO SAVE ACCOUNT
Visa, MC, Amex	54	EXPIRED CARD
Disc	56	INVALID CARD
Visa, Disc	57	SERV NOT ALLOWED
Visa, Amex, Disc	58	SERV NOT ALLOWED
Visa, MC, Disc	61	DECLINE
Visa, MC, Disc	62	DECLINE
MC, Disc	63	SEC VIOLATION

Table A-1 Issue Decline Codes (Continued)

Brand	Code	Response
Visa, MC, Disc	65	DECLINE
MC	76	CARD NO ERROR
Amex, Disc	76	NO ACTION TAKEN
Amex, Disc	78	NO ACCOUNT
Visa, MC, Disc	91	NO REPLY
Visa, MC, Disc	96	SYSTEM ERROR
Visa	EB	CHECK DIGIT ERR
MC, Amex, Disc	EC	CID FORMAT ERROR
Visa, Amex	N7	CVV2 MISMATCH

Appendix B: Healthcare MCCs

Merchants with healthcare MCCs have some restrictions on the data that can be entered into the Global Payments Virtual Terminal. These restrictions are in place to help prevent the input of protected health information. Data entry for the purchase order, invoice, and customer ID fields is limited to a maximum of eight (8) digits; alpha characters are not allowed.

The applicable MCCs are:

Table B-1 Healthcare MCCs

MCC	Description
4119	Ambulance Services
5047	Dental/Lab/Medical/Ophthalmic Hospital Equip & Supplies
5122	Drugs, Drug Proprietaries, and Druggists Sundries
5912	Drug Stores, Pharmacies
5975	Hearing Aids-Sales, Service, Supply Stores
5976	Orthopedic Goods-Artificial Limb Stores
7277	Debt, Marriage, Personal-Counseling Service
7298	Health and Beauty Spas
8011	Doctors-not elsewhere classified
8021	Dentists, Orthodontists
8030	Osteopathic Physicians
8041	Chiropractors
8042	Optometrists, Ophthalmologists
8043	Opticians, Optical Goods, and Eyeglasses
8049	Chiropodists, Podiatrists
8050	Nursing and Personal Care Facilities
8062	Hospitals
8071	Dental and Medical Laboratories
8099	Health Practitioners, Medical Services-not elsewhere classified