

Payments

Quick Start Guide

Global Payments

Virtual Terminal — Portico

October 2021

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Introduction

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

General Tips

The following tips will help ensure you continue to process smoothly with Global Payments Portico VT:

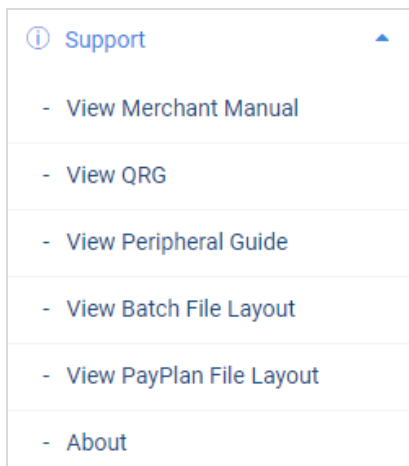
1. This quickstart guide contains information on the features and functions available on the solution, as well as basic troubleshooting techniques. Keep this guide handy.
2. Our support team is available 24 hours a day, 7 days a week, to ensure there is always someone ready to help!

Support

Self-help resources

Before reaching out to our support team, you can:

- Access various documentation directly from the Portico Virtual Terminal menu > **Support** section. It should have most of the information you are looking for. .



Contact support team

If you are still stuck and must talk to someone, please don't hesitate to contact our support team. We'd be happy to help!

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

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**.

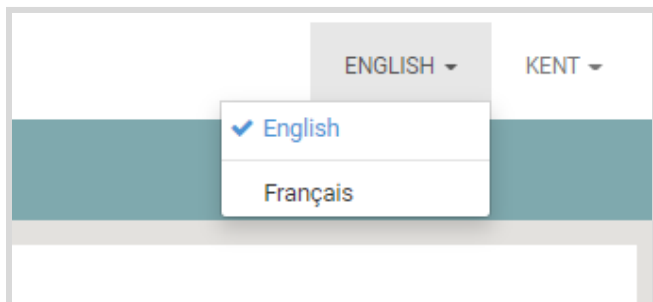
Password requirements

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.



Process a credit card sale

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

The screenshot shows a web interface for processing a credit card sale. At the top, there are navigation tabs: SALE, RETURN, VERIFY, and UPLOAD BATCH. Below these, there's a 'Clear' button and several input fields for amounts, all currently set to \$0.00. A 'TAX EXEMPT' checkbox is also present. The main section is titled 'Credit Payment' and shows 'AMOUNT DUE \$0.00'. The 'MOTO' option is selected and highlighted with a green border. Other options include 'AUTH ONLY' and 'OFFLINE'. There are fields for 'CARD NUMBER *', 'EXP DATE *', 'ZIP / POSTAL CODE *', 'SECURITY CODE', 'SECURITY CODE STATUS', 'INVOICE NUMBER(S)', and 'PO NUMBER'. A 'CUSTOMER INFORMATION' section includes fields for 'CUSTOMER ID', 'STREET *', 'PHONE', 'FIRST NAME', 'CITY', 'EMAIL', 'LAST NAME', and 'STATE / PROVINCE'. A 'DESCRIPTION' field is at the bottom. At the bottom right, there are checkboxes for 'ALLOW DUPLICATE' and a blue 'Process' button. A 'Clear All' button is at the bottom left.

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).
8. 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.

Process a credit card return

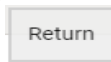
Use a return to refund money to the customer's credit card for returned items from a previously closed batch.

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, follow 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" prompt form. The form has a title "Return" at the top. Below the title, there are two fields: "Card Number" with the value "*****1111" and "Return Amount *" with the value "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




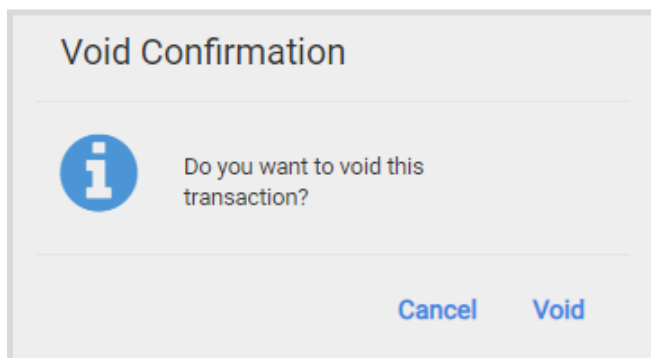
1. To perform a void from the transaction results screen, click the **Void**  icon.
2. Click **Void** on the Void Confirmation prompt. Step Result: The transaction results screen appears, displaying the issuer authorization response. A successful void displays Canceled.

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.



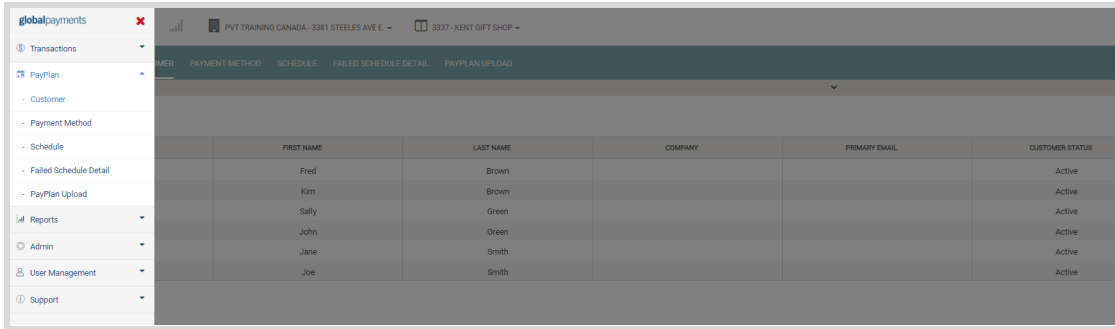
2. Click the **Void**  icon from the transaction results screen.
3. Click **Void** on the confirmation prompt. The transaction result page displays the issuer authorization response. A successful void displays Canceled.



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 interface with a sidebar menu on the left and a main content area. The sidebar menu includes options like Transactions, PayPlan, Customer, Payment Method, Schedule, Failed Schedule Detail, PayPlan Upload, Reports, Admin, User Management, and Support. The main content area displays a table 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

Customers

Add a customer


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


Merchants within the Healthcare MCCs may only enter a maximum 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.

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 .
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.

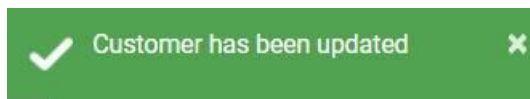
5. To export the list, click  icon in the top right-hand corner and select the file format for the export (CSV, PDF).
6. To see details about the customer, click the **Customer ID**.

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.

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](#).

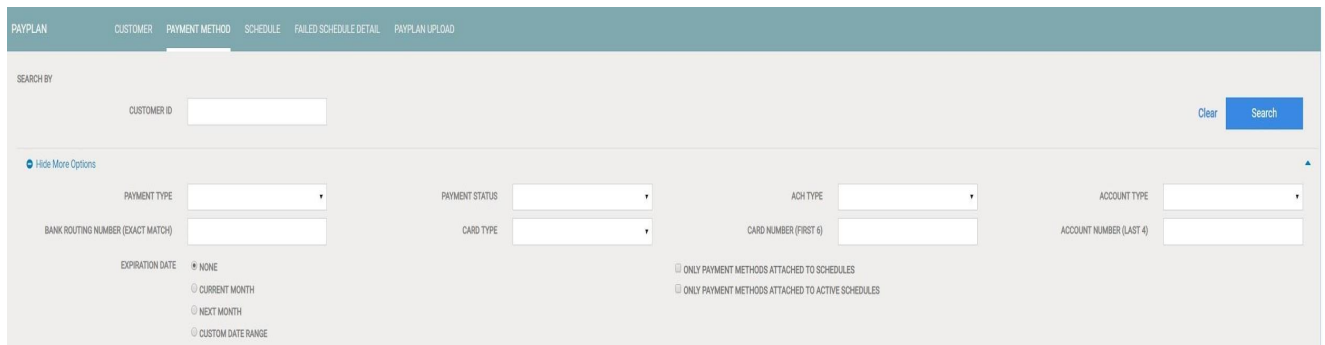
You are able to add a new payment method from the View Customer page as a part of the find process.

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**

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' application interface for searching payment methods. At the top, there is a navigation bar with tabs: 'PAYPLAN', 'CUSTOMER', 'PAYMENT METHOD', 'SCHEDULE', 'FAILED SCHEDULE DETAIL', and 'PAYPLAN UPLOAD'. Below the navigation bar, there is a search section. It starts with 'SEARCH BY' and a 'CUSTOMER ID' input field. To the right of this field are 'Clear' and 'Search' buttons. Below the search section, there is a 'Hide More Options' link. The search criteria are organized into several columns: 'PAYMENT TYPE' (dropdown), 'PAYMENT STATUS' (dropdown), 'ACH TYPE' (dropdown), and 'ACCOUNT TYPE' (dropdown). Below these are 'BANK ROUTING NUMBER (EXACT MATCH)' (input), 'CARD TYPE' (dropdown), 'CARD NUMBER (FIRST 6)' (input), and 'ACCOUNT NUMBER (LAST 4)' (input). At the bottom of the search criteria, there are radio buttons for 'EXPIRATION DATE' (NONE, CURRENT MONTH, NEXT MONTH, CUSTOM DATE RANGE) and 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 **View under** to view linked schedules. The **View Linked Schedules** page is displayed
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**.

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).

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

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 the 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).

Charge Now

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

[Cancel](#) [Process](#)

Detailed Charge

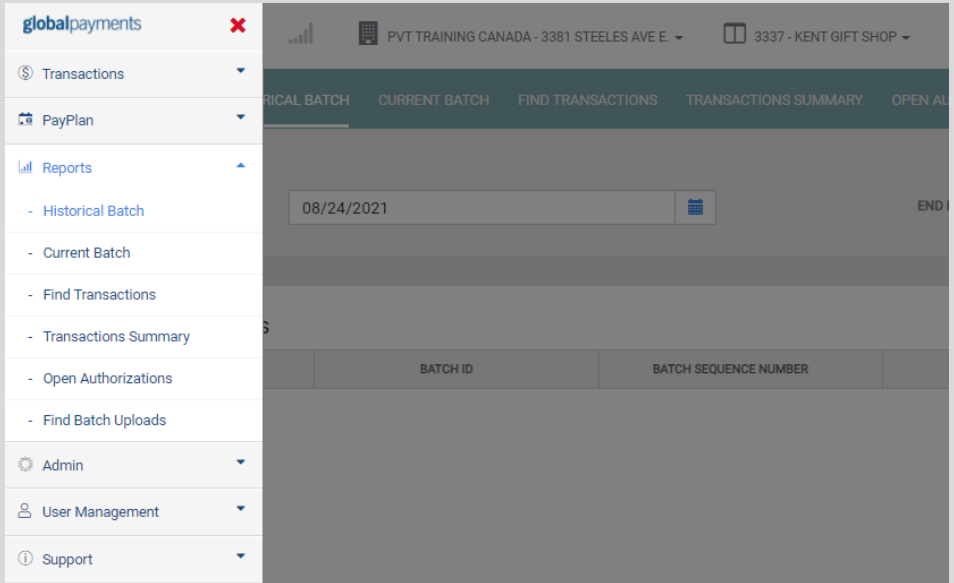
1. To make a detailed charge, click **Detailed Charge**  icon.
2. The One Time Payment page displays.
3. Type the amount in the subtotal field.
4. Optionally, type the invoice number and a description. Credit card stored payments also have the option to enter a tax amount and PO Number.
5. Click **Process**. 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
	CITY Montreal
	STATE / PROVINCE
	ZIP / POSTAL CODE
SUBTOTAL * \$0.00	TAX AMOUNT \$0.00
	TOTAL AMOUNT \$0.00
	<input type="checkbox"/> TAX EXEMPT
INVOICE NUMBER(S) Add Invoice Number	PO NUMBER
	<input type="checkbox"/> AUTH ONLY
DESCRIPTION	
Cancel	<input type="checkbox"/> ALLOW DUPLICATE
	Process

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.



The screenshot shows the Global Payments web interface. On the left is a navigation menu with options: Transactions, PayPlan, Reports, Admin, User Management, and Support. The 'Reports' section is expanded, showing sub-options: Historical Batch, Current Batch, Find Transactions, Transactions Summary, Open Authorizations, and Find Batch Uploads. The main content area displays a transaction summary for the date 08/24/2021. At the top, it shows 'PVT TRAINING CANADA - 3381 STEELES AVE E.' and '3337 - KENT GIFT SHOP'. Below the date, there are columns for 'BATCH ID' and 'BATCH SEQUENCE NUMBER'. The table content is mostly obscured by a grey overlay.


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.

1. Click **Reports > Find Transactions**
2. 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.

Print

To print a report, click the **Print**  button.

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:

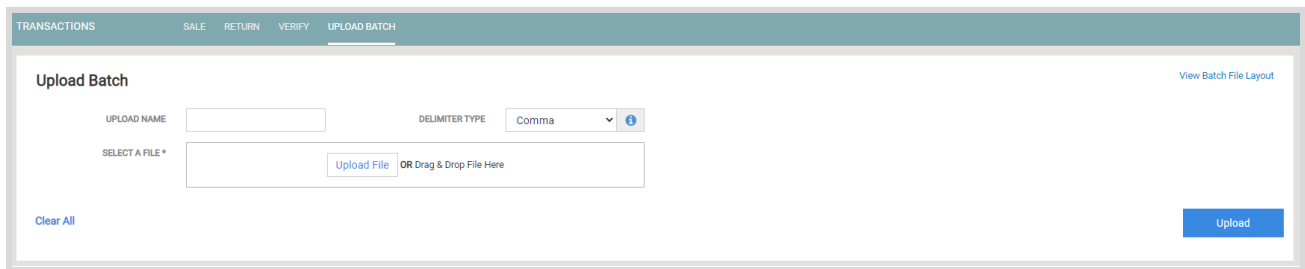
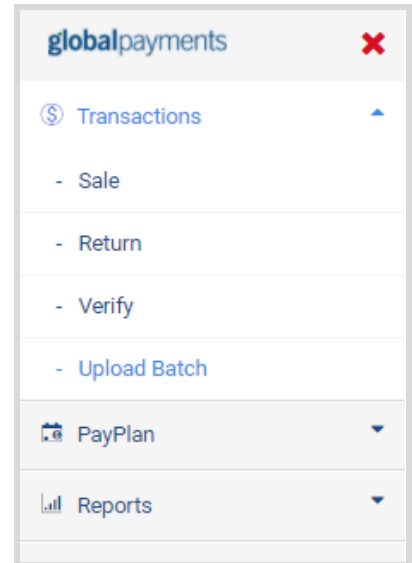
- PDF
- CSV

Upload batch file

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

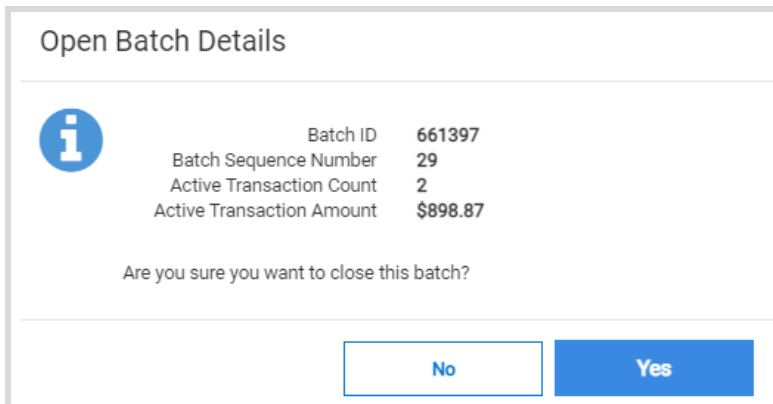
1. Navigate to **Transactions > Upload Batch**.
2. Fill in the upload name.
3. Click **Delimiter Type**.
4. Click **Upload File** or **Drag & Drop File** to be processed.
5. Click **Upload**.

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.



Close a batch

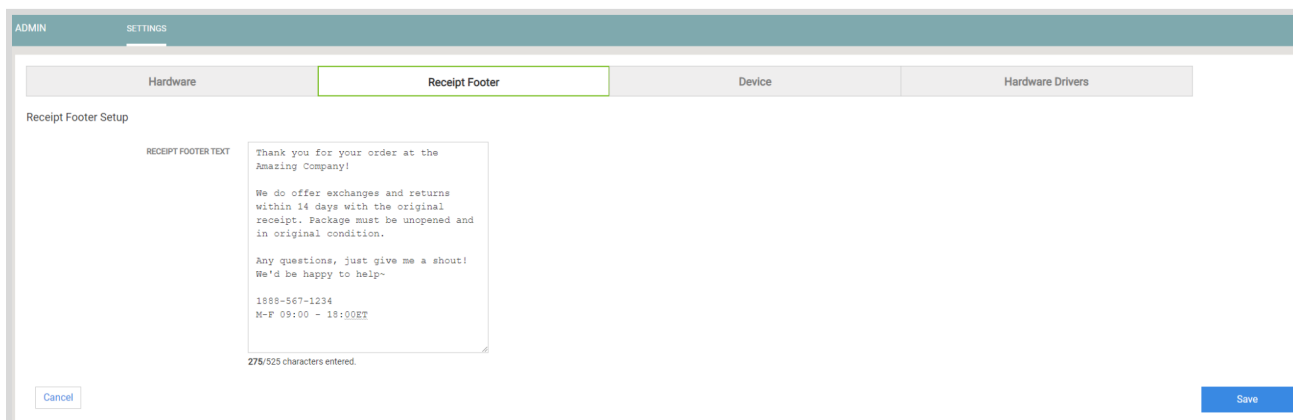
If your account does not have the Auto-Close function turned on, you can use Close a batch to close the current open batch. We recommend you to close your batch at least once per day.



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.




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 ^{↖1}	MERCHANT NUMBER	ROLE NAME ^{↖2}	ACTIONS
<input type="checkbox"/>	Global Payments VT	666611122019	MerchantClerkUser	
<input type="checkbox"/>	Global Payments VT	666611122019	MerchantMgrUser	
<input type="checkbox"/>	Global Payments VT	666611122019	MerchantReportingTrxnUser	

1 - 12 of 12 items


- Click this Icon  to add the merchant and Role to the user
- 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 ^{↖1}	MERCHANT NUMBER	ROLE NAME ^{↖2}	ACTIONS
<input type="checkbox"/>	Global Payments VT	666611122019	MerchantAdmin	

1 - 1 of 1 items

- 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 *

DEFAULT DEVICE *

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

User Registration

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

OK

Permissions by role

Table 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