

vSecureGateway

vTerminal User Guide

Version 100901



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Login

The vTerminal is a secure, browser-based, virtual terminal application that enables merchants to process credit card transaction and view transaction history.

For your initial login use the username and password provided in your account information e-mail from DFG Customer Service. Once you login with the default password provided, go through the "Change Password" process to make your password more personalized for your use. For higher security do not have your browser automatically save your password. This will prevent an unauthorized user from accessing your account.


**** Note:** *This site requires Internet browser IE 7.0 or higher, Firefox, or Chrome*

To log in to the vTerminal, perform the following steps:

1. Visit the Virtual Terminal Web site at <http://www.vsecuregateway.com/VirtualTerminal>.

**** Note:** *Witness the site URL change from http to https. Also notice how the address bar changes into a "Green" bar. This indicates that the site is protected with an Extended Validation (EV) Certificate. This digital certificate is only issued to companies that have satisfied an extensive validation process.*

2. Type your **Username** and **Password** into the **DFG vTerminal Login** box.
3. Click **Login**.



The screenshot shows a login form titled "Please log in". It contains two input fields: "*Username" with the text "XXXXXXXX" and "*Password" with seven dots. Below the fields is a "Login" button. A note below the button states "* denotes required field". At the bottom of the form is a link that says "Forgotten your password?".

Change Password

When setting a password for your vTerminal account follow the following password recommendation to insure the security of your account. Password recommendations are: mixed numbers, letters, and symbols, 8-16 in length (e.g., "ABCdef!8"). Passwords on this site are also case-sensitive; so if you use capital letters when setting your permanent password, you must capitalize those same letters during login.

To set your new, password for the vTerminal site, perform the following steps:

1. Type your **current password** into the upper box.
2. Type the **new password** in the middle box
3. Then verify it in the **Confirm New Password** box.
4. Click **change password** to save your new DFG Virtual Terminal password.

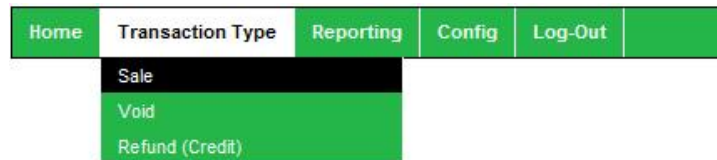
Important: Your password allows you to access sensitive information about your customers and transactions. Do not share your password with anyone who should not have access to this information.

Processing a **Sale** Transaction:

The vTerminal **Sale** function enables you to process a sale transaction by entering the data for a charge request into a secure online form.

To create a sale transaction, perform the following steps:

1. Roll the mouse over the **Transaction Menu Option**.
2. Select **Sale** - the vTerminal displays an online form to enter the sale transaction.



3. Type the customer's transaction information into the appropriate boxes, according to the following specifications:

Card Details

- **Card Type** is the card type, MasterCard, Visa, Discover, or American Express.
- **Card Number** is the cardholder's account number. Do not include any letters, spaces, or special characters in the **Card Number**.
- **Expiration Date** is the date the card expires. Use the dropdown options to select the correct date.
- **Card Verification Value** is a three-digit number printed on the signature panel of MasterCard and Visa cards. This value helps you verify that a customer has a legitimate card, in hand, at the time of an order.

Card Holder Billing Information

- **Name** is the card holder's name. *Required*
- **Phone** is the customer's phone number
- **Street** is the billing address for the card. *Required*
- **City** is the billing address city.
- **State** is the billing address state.
- **Zip** is the billing address zip. *Required*

Sale Detail

- **Type of Sale** is the sale type: In Store - use for face to face sales, Over The Phone - use for non face to face sales taken over the phone, Internet - for non face to face sales taken over the internet.
 - **Custom Field #1** is a user defined field (see "Config - Updating Custom Field" section)
 - **Custom Field #2** is a user defined field (see "Config - Updating Custom Field" section)
 - **Transaction Amount** is the total amount to be charged, and includes taxes and shipping.
2. Click **Process**.
 3. Review the transaction then Click **Confirm**
 4. **Email** or **Print** receipt, or press **Next** to skip.

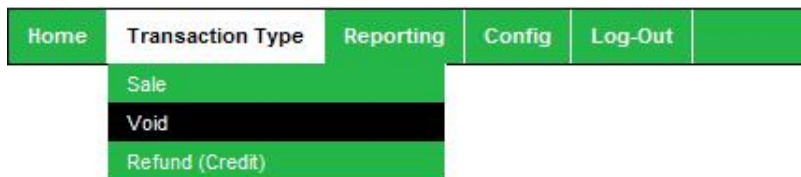
Processing a **Void** Transaction

Void cancels a pending transaction and removes the transaction from the day's totals. You can only void transactions that were processed during the current business day.

Performing a void function can be accomplished from the main menu option or from the reporting pages.

To void a transaction from the main menu, perform the following steps:

1. Roll the mouse over the **Transaction Menu Option**
2. Select **Void**



3. Enter the **Transaction ID**. This may be found on the receipt

A screenshot of a form titled 'Enter transaction id to void:'. The form contains a label 'Transaction ID:' followed by a text input field. Below the input field is a green button with the text 'Process'.

4. Click **Process**

Processing a **Void** Transaction via Reporting

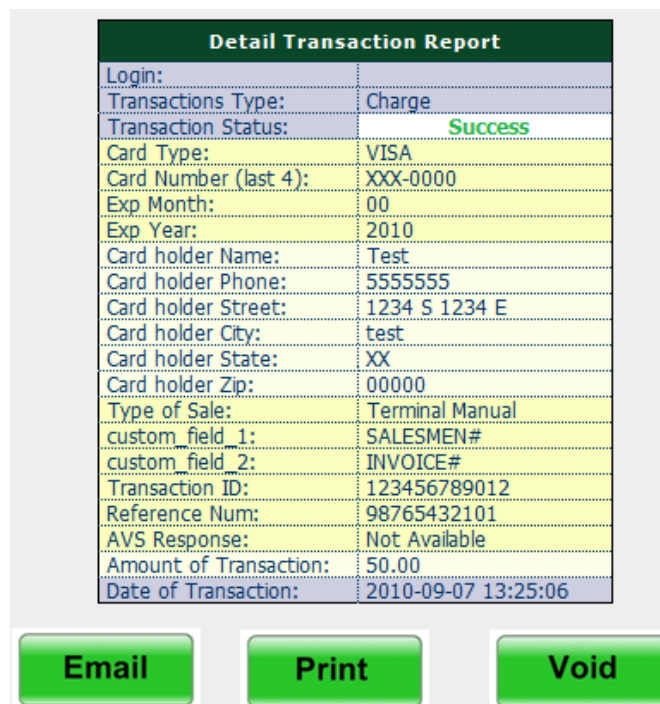
To void a transaction from the **Reporting** site, perform the following steps:

1. Select the **Reporting** Menu Option



2. Find the transaction and click the Detail button on the far right
3. Click on Void button on the detail screen

Note: The void button will only be available for transactions that have been processed during the current business day.



The screenshot shows a 'Detail Transaction Report' window. It contains a table of transaction details and three buttons at the bottom: Email, Print, and Void.

Detail Transaction Report	
Login:	
Transactions Type:	Charge
Transaction Status:	Success
Card Type:	VISA
Card Number (last 4):	XXX-0000
Exp Month:	00
Exp Year:	2010
Card holder Name:	Test
Card holder Phone:	5555555
Card holder Street:	1234 S 1234 E
Card holder City:	test
Card holder State:	XX
Card holder Zip:	00000
Type of Sale:	Terminal Manual
custom field 1:	SALESMEN#
custom field 2:	INVOICE#
Transaction ID:	123456789012
Reference Num:	98765432101
AVS Response:	Not Available
Amount of Transaction:	50.00
Date of Transaction:	2010-09-07 13:25:06

Buttons: Email, Print, Void

Processing a **Refund (Credit)** Transaction

Refund returns the original dollar amount to a customer's credit card account, based on a previously settled transaction, usually the day after taking the original transaction.

It is not necessary to have the customer's credit card number because Refund uses the credit card number from the original transaction.

Performing a refund function can be accomplished from the main menu or from the reporting pages.

To Refund a transaction from the main menu, perform the following steps:

1. Roll the mouse over the **Transaction Type** Menu Option
2. Select **Refund (Credit)** – the vTerminal displays an online form to enter the details for the transaction to refund



3. Enter the **Transaction ID**. This may be found on the receipt
4. Enter the **Reference #**. This may be found on the receipt
5. Enter the **Original Amount**. This may be found on the receipt
6. Click **Process**

Transaction ID: Reference #:

Amount of original transaction to Refund (Credit):



7. Review the transaction and click **Confirm**.
8. Once authorized you will have the option to **Email** or **Print** receipt, or press **Next** to skip.

Processing a **Refund** (Credit) Transaction via Reporting

To void a transaction from the **Reporting** site, perform the following steps:

1. Select the **Reporting** Menu Option



2. Find the transaction and click the Detail button on the far right
3. Click on **Refund** button on the detail screen



The screenshot shows a 'Detail Transaction Report' window. It contains a table with transaction details and three buttons at the bottom: Email, Print, and Refund.

Detail Transaction Report	
Login:	
Transactions Type:	Charge
Transaction Status:	Success
Card Type:	VISA
Card Number (last 4):	XXX-0000
Exp Month:	00
Exp Year:	2010
Card holder Name:	Test
Card holder Phone:	5555555
Card holder Street:	1234 S 1234 E
Card holder City:	test
Card holder State:	XX
Card holder Zip:	00000
Type of Sale:	Terminal Manual
custom_field_1:	SALESMEN#
custom_field_2:	INVOICE#
Transaction ID:	123456789012
Reference Num:	98765432101
AVS Response:	Not Available
Amount of Transaction:	50.00
Date of Transaction:	2010-09-07 13:25:06

Buttons: Email, Print, Refund

4. The **Transaction ID** and **Reference #** will automatically be filled out on the resulting form, Click the **Process** button to continue
5. Review the transaction and click **Confirm**
6. Once authorized you will have the option to **Email** or **Print** receipt, or press **Next** to skip

Note: The refund button will only be available for transactions that are available to be refunded.

Transaction Reporting

Overview:

This site provides secure, real-time reporting on transactions processed by the vTerminal application, as well as the vWedgy application, and transactions processed by our CellSwipe applications.

The site provides several query options for organizing your online reporting view.

Query options include:

- viewing successful versus unsuccessful transactions
- view charge or void or just refunded transactions
- view transaction process "today" or between a selected start/end date

The standard online report view provides with the following data elements:

- Transaction Type
- Transaction Status
- Transaction Amount
- Type of Sale
 - Swipe – Indicating a swiped transaction via the vWedgy app
 - Manual – Indicating a manual transaction via the vWedgy app
 - Mobile Swipe – Indicating a swipe transaction via a CellSwipe app
 - Mobile Manual – Indicating a manual transaction via a CellSwipe app
 - In Store, Over the Phone, Internet – are user selectable options available when processing the transaction via the Virtual Terminal app
- Custom Field 1 and Custom Field 2 (only available via the vTerminal)
- Date & Time of the transaction.

The online report can also be sorted by any of the standard data elements. Selecting the column header will sort the given report by the column selected. Selecting the column twice will sort in the reverse order. Note: A small arrow head will appear next to the column header indicating the direction of the sort.

A "Detail" button is available for each transaction providing access to additional card holder information collected during the transaction. The "Detail" button is located in the right column of every transaction.

Any customized query performed on the site can be downloaded in an Excel file. The "Export Report Data" button is located at the bottom of each report. Selecting this button will export the given report for download. The exported file will contain a detail viewing of all transactions in the given query. It will contain the standard data elements with the detail data element that are available under the "Detail" button.

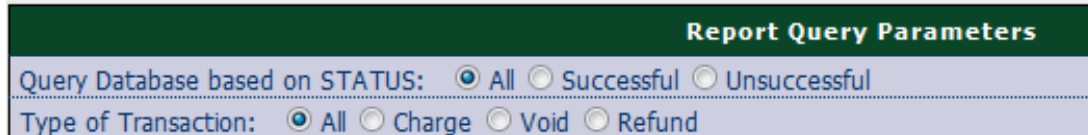
Accessing Reports:

To access the Reporting site, perform the following steps:

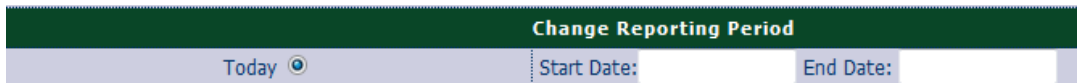
1. Select the **Reporting** Menu Option



2. Click a transaction **Status** and **Type** (Default is ALL)



3. Click **Today** or enter transaction dates in the **Start Date** and **End Date**



Export Reporting:

To export a transaction report, perform the following steps:

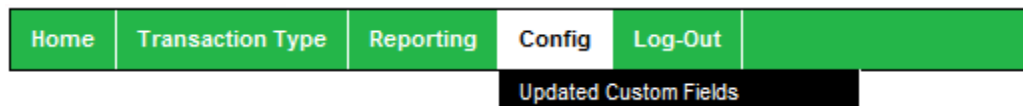
1. Generate a report by selecting the appropriate query/reporting options
2. Click **Export Report Data** at the bottom left of the screen
3. Save Excel file to your computer

Configuration Options

The Config option allows the user to create custom tags that can be associated with transaction processed by the vTerminal application.

To change the **Custom Fields** perform the following steps:

1. Roll the mouse over the **Config** Menu Option
2. Select the **Update Custom Fields** Menu Option.



3. Enter a value for the Custom Fields (For example: invoice#:, Product #:, Product Type:)

	Current Value	New Value
Custom Field #1	MID:	
Custom Field #2	Item Sold	

(For example: invoice #:, Product #:, Product Type:)



4. Click **Process** to submit the new custom fields

Note: if the Custom Field is left blank then the field will be omitted from the Sale transaction screen.

Logout

To log out of the vTerminal, click the **Logout** button located in the upper-right corner of the vTerminal screen, or select the Log-Out menu option.

