vSecureGateway

# vWedgy User Guide

Version 100909

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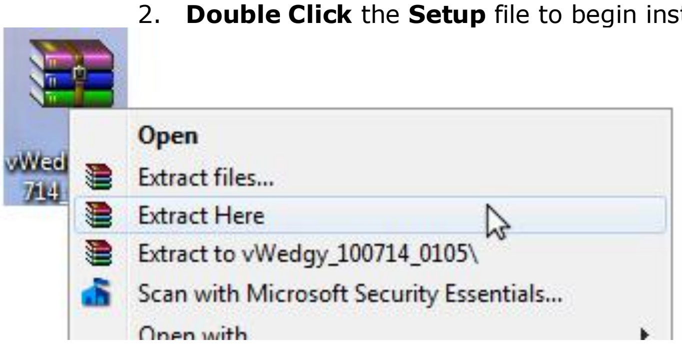
# Downloading and Installing Your Software

1. **Extract** files to your desktop
2. **Double Click** the **Setup** file to begin installation




# Logging In

Start the vWedgy application from your desktop.

1. Type your **Username** and **Password** into the **vSecureGateway vWedgy Login** box.
2. Click **Login**.

# Getting Started

## Connecting Your Swipe Device:

Plug the vWedgy swipe device into any available USB port on your desktop or laptop computer. The computers operating system will automatically install the appropriate drivers. When this is complete the indicator light on the swipe device will glow Green. Depending on your system you may also receive a notice indicating the device is ready to use.

The status bar at the bottom of the vWedgy application window lets you know if a swipe device is properly connected to the computer ( Green = Connected and Red = Not Connected). The application will operate with or without the swipe device connected, however only manual transactions will be available when the swipe device is not attached.



## Home Page Icons

vWedgy Customer Support can be contacted by E-mail or Phone.

1. **Click** on the **E-mail icon** at the bottom of the Welcome page to open a new E-mail message
2. **Click** on the **Phone icon** to open the Customer Support Contact information
3. **Click** on the **Report icon** at access online reporting via the vSecureReports website.

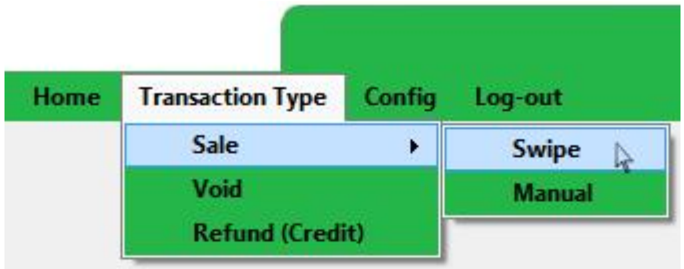
**Email Icon**

**Phone Icon**

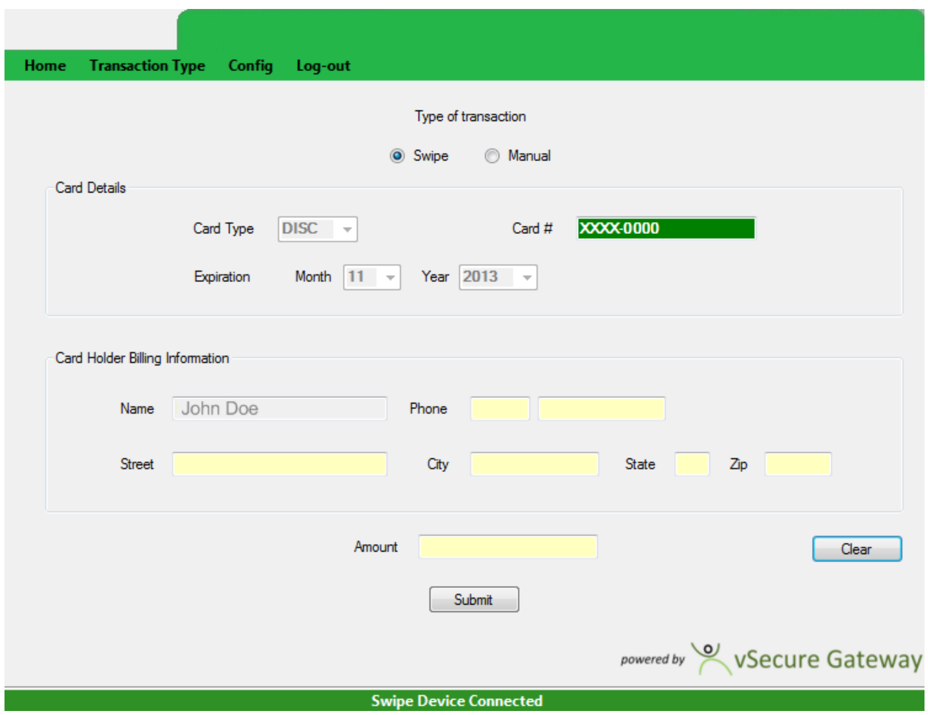
**Report Icon**

# Processing a **Swipe** Sale Transaction

1. Make sure the Swipe device is attached to the computer.
2. Click the **Transaction Type** Menu Option.
3. Click **Sale**.




4. Click **Swipe.**
5. Swipe the customer's Credit Card through the swipe device. The Card Type, Card #, Expiration Date, and Name will auto fill. Enter additional information and transaction amount.




6. Click **Submit**.
7. **Print** receipt, or press **Close** to skip.

# Processing a **Manual** Sale Transaction:

1. Click the **Transaction Type** Menu Option.
2. Click **Sale**.
3. Click **Manual**
4. Type the customer's transaction information into the appropriate boxes, according to the following specifications:

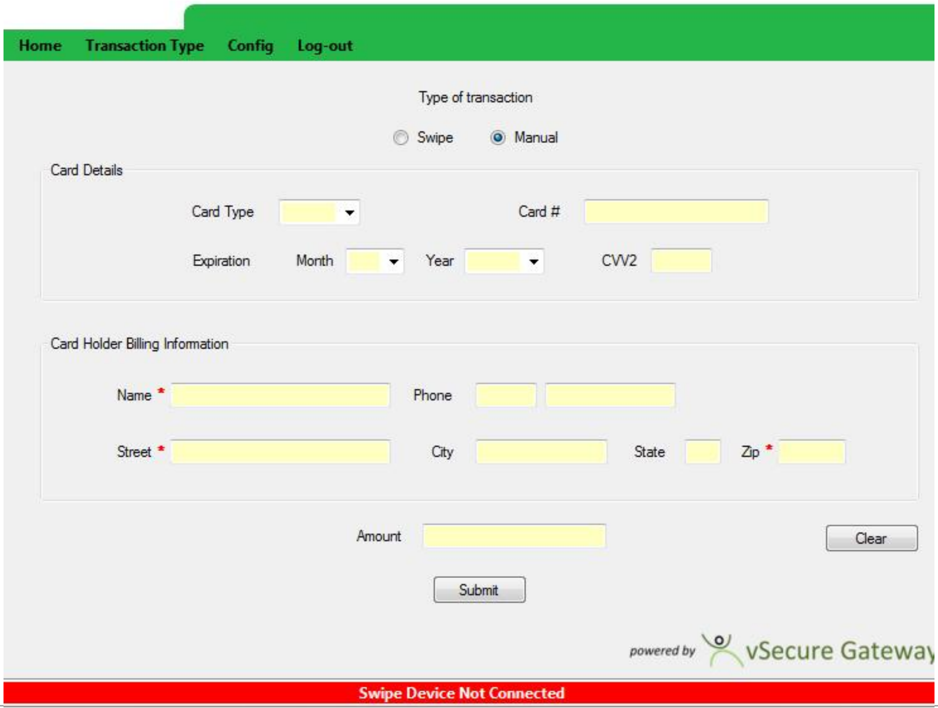
**Card Details**

- **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 customers 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
- **Transaction Amount** is the total amount to be charged, and includes taxes and shipping.

5. Click **Submit**.
6. **Print** receipt, or **Close** to skip.




**** Note:**
*Card holder data marked with the red asterisks are required fields. Also note that this screen capture shows the swipe device not attached.*

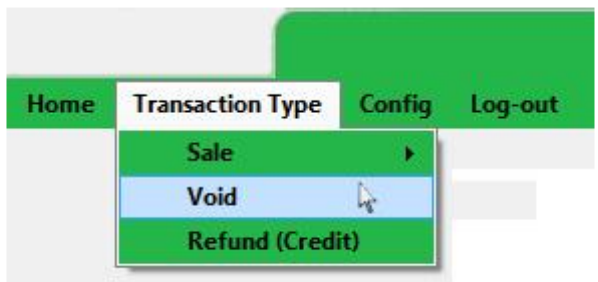
# Processing a **Void** Transaction

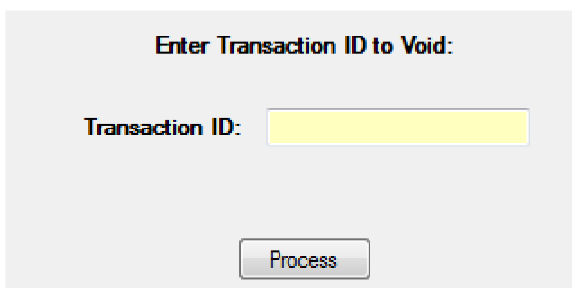
**Void** cancels a settled transaction and removes the transaction from the day's settled totals. You can only void transactions that were settled during the current day's business.

You can void a transaction from the **vWedgy application** or the **Online Reporting** site (vSecureReports).

To void a transaction perform the following steps:

1. Click the **Transaction** Menu Option
2. Select **Void**
3. Enter the **Transaction ID.** This may be found on the receipt
4. Click **Process**



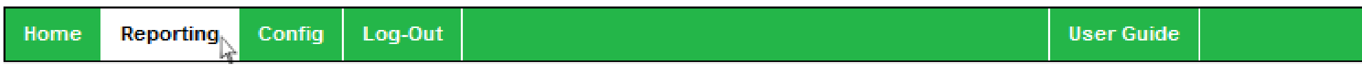
# Processing a **Void** Transaction via Online Reporting (vSecureReports)

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

1. Click the **Reporting icon** on the vWedgy home page.

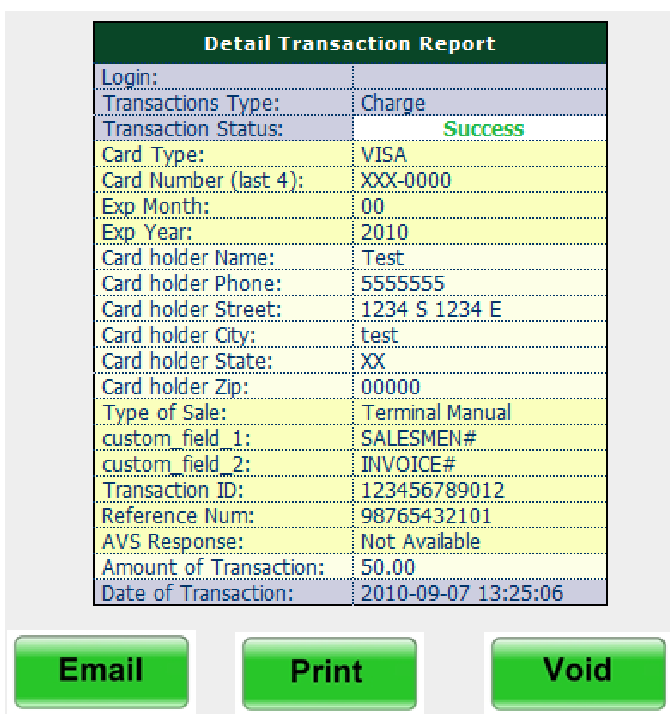
   **Note**: *Your default browser will open and you will be automatically logged into the vSecureReporting site*

2. When the browser opens, click on the **Reporting** menu option in vSecureReports.




3. Click the **Reporting** Menu Option
4. Find the transaction and click the **Detail** button on the far right.
5. Click on **Void** button on the detail screen

   ***Note****: The void button will only be available for transactions that have been processed within the given process day.*



| 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 |

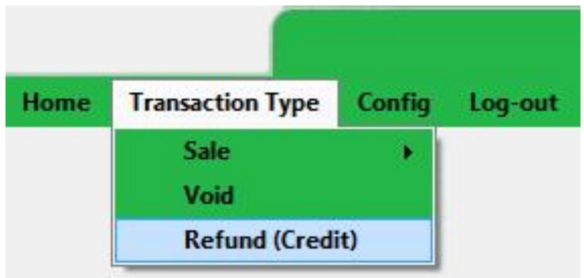
# Processing a **Refund** (Credit) Transaction

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.

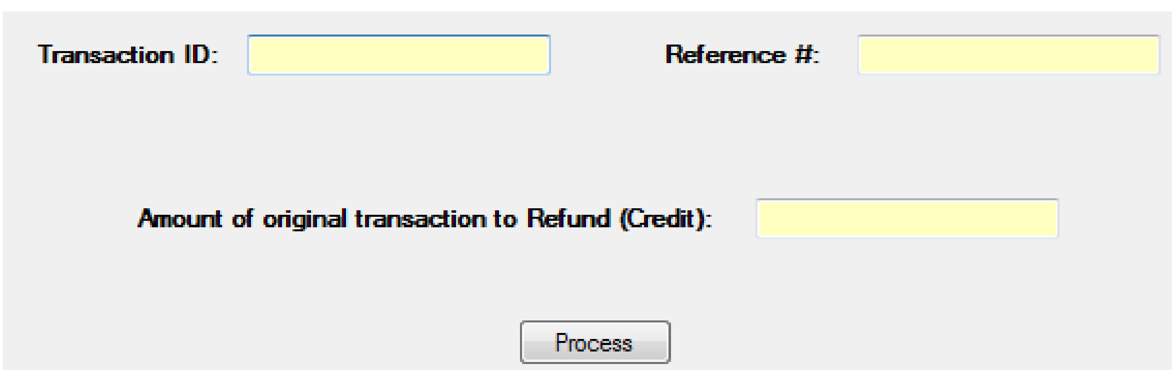
It is not necessary to have the customer's credit card number because Refund uses the credit card number from the original transaction.

You can issue a refund from the **vWedgy application** or the **Online Reporting** site (vSecureReports)..

To Refund a transaction, perform the following steps:
Roll the mouse over the **Transaction** Menu Option




1. Select **Refund (Credit)**
2. Enter the **Transaction ID.** This may be found on the receipt
3. Enter the **Reference #.** This may be found on the receipt
4. Enter the **Original Amount.** This may be found on the receipt
5. Click **Process**




6. Review the transaction and click **Confirm**.
7. **Email** or **Print** receipt, or press **Next** to skip.

# Processing a **Refund** (Credit) Transaction via Online Reporting (vSecureReports)

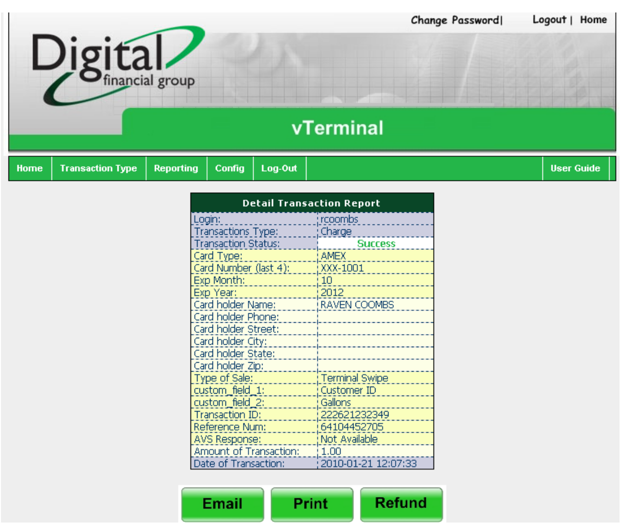
To refund a settled transaction from the **Online Reporting** site, perform the following steps:

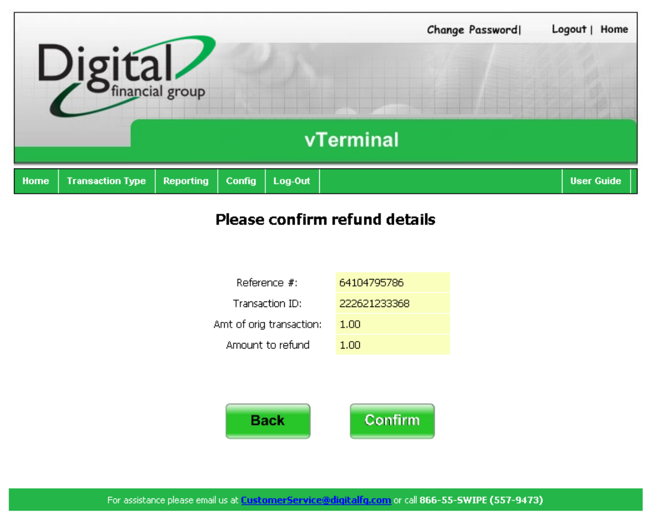
1. Click the **Reporting icon** on the vWedgy home page.

   **Note**: *Your default browser will open and you will be automatically logged into the vSecureReporting site*

2. When the browser opens, click on the **Reporting** menu option in vSecureReports.


3. Change the **Start Date** and **End Date** to include the original transaction date.
4. Find the transaction and click the **Detail** button on the far right.
5. Click on **Refund** button on the detail screen
6. The **Transaction ID** and **Reference #** will automatically be filled out
7. Click **Process**
8. Review the transaction and click **Confirm**.
9. **Email** or **Print** receipt, or press **Next** to skip.



# Transaction Reporting (vSecureReports)

## Overview:

All transactions processed by the vWedgy application are available via the vSecureReports online reporting site. This site provides secure, real-time reporting on transactions processed by the vWedgy application, Virtual Terminal 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 (available only via the Virtual Terminal app)
- Date & Time of the transaction.

The online report can also be sort 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 transaction in the given query. It will contain the standard data elements with the detail data element that are available view the "Detail" button.

## Accessing Online Reports:

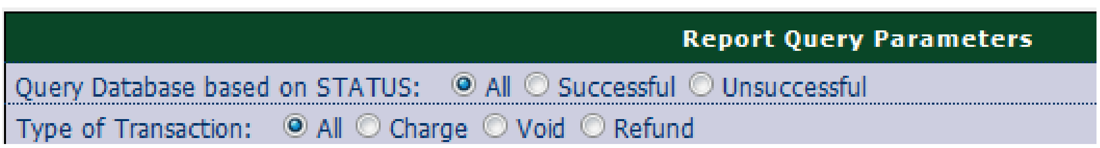
To access the online reporting site, perform the following steps:

1. Click the **Reporting icon** on the vWedgy home page.

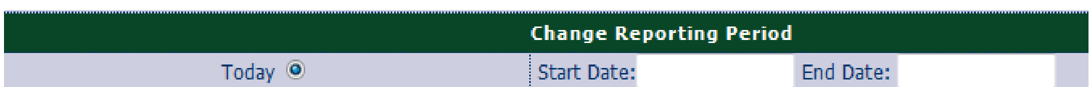
   **Note**: *Your default browser will open and you will be automatically logged into the vSecureReporting site*

2. When the browser opens, click on the **Reporting** menu option in vSecureReports.

3. Click a transaction **Status** and **Type**.
   *Default is All




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




5. Click on **Detail** in the right column of the transaction to view additional details on the selected transaction

## 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

## Changing Your Password:

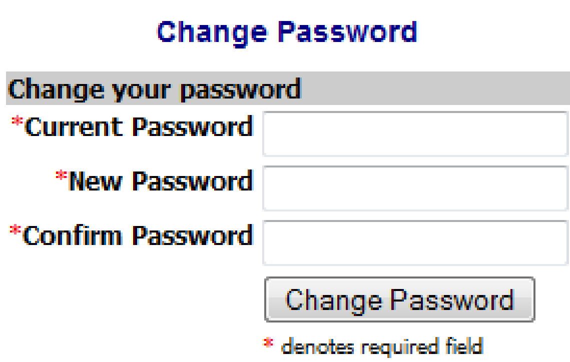
To set your new, permanent password for vWedgy and vSecureReporting perform the following steps:

1. Click on the **Reporting** icon at the bottom of the home page of the vWedgy application

   **Note**: *Your default browser will open and you will be automatically logged into the vSecureReporting site*

2. Click on **Change Password** at the top of vSecureReporting page
3. Type your **current password** into the upper box.
4. Type the **new password** in the middle box
5. Then verify it in the **Confirm New Password** box.
6. Click **change password** to save your new vWedgy and vSecureReporting password.

**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.**



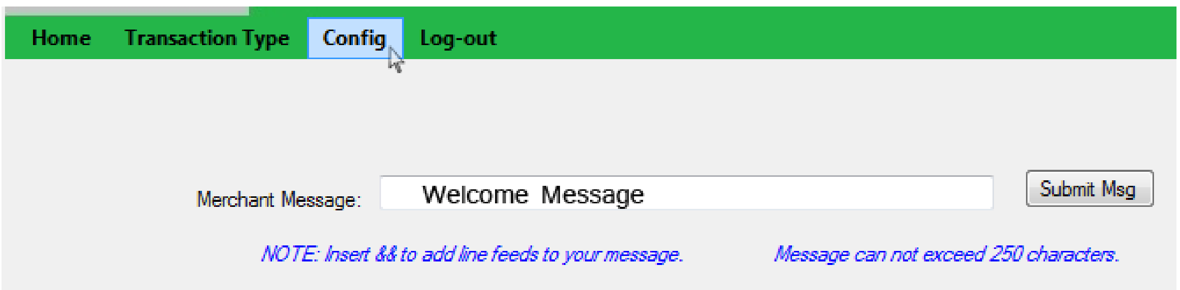
# Configuration Options

The Config option allows the user to customize the welcome message displayed on the Home page and to modify the configuration of the swipe device.

## Update Welcome Message:

To change the Welcome Message perform the following steps:

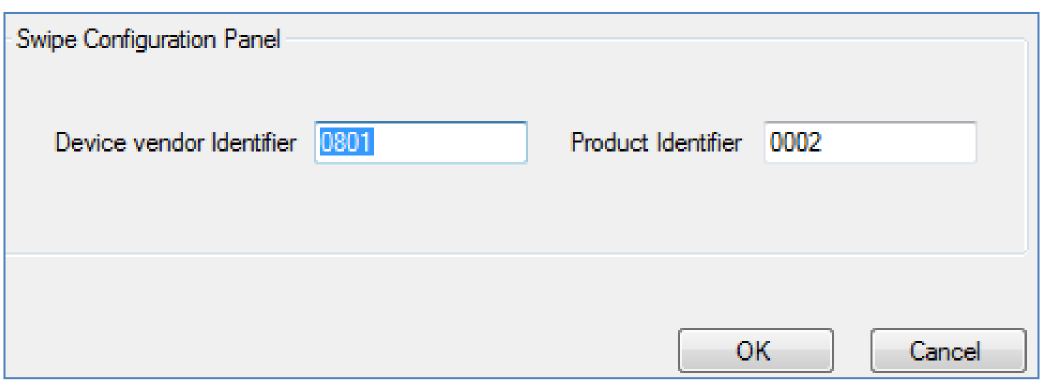
1. Click on the **Config** Menu Option.
2. Enter the new message in the text box
3. Click **Submit Msg**




## Configure Swipe Device:

**** Important Note**: The default values provided with the application are set to operate with the preconfigured vWedgy Magtek device provided. Changing these values may prevent you from using the swipe device with the application.

4. Click on the **Config** Menu Option.
5. Click on **Advanced**
6. Enter the new **Device Vendor Identifier** and **Product Identifier**
7. Click OK to make changes
8. Click Cancel to discard any changes
9. Click on Home to return to the Home page



# Logout

To log out of vWedgy application, click the **Log-out** menu button

To log out of vSecureReporting, click the **Log-out** menu button located in the menu bar or in the upper-right corner of the vSecureReporting screen, and close your browser.

vSecureReporting contains secure information regarding your orders and customers, so it is important to log out of the vSecureReporting area after you have completed your order management tasks.