



Velocity Virtual Terminal



VT account setup

Accessing your VT account

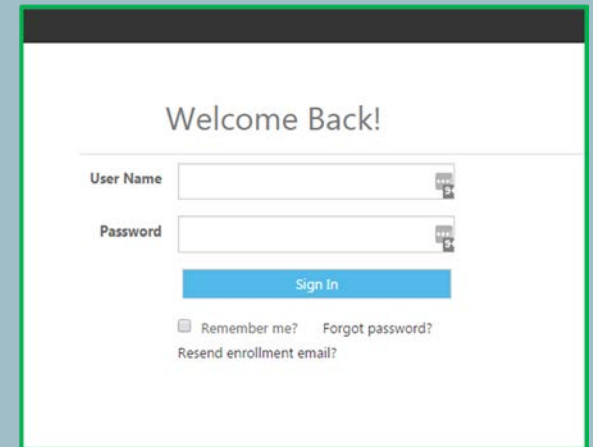
<https://portal.nabcommerce.com>

Password Reset

From the login page click Forgot password

Enter your user name

If the user name was correct you will be prompted to answer your security questions. If you're not prompted to answer a security questions, the provided user name was incorrect. You can reset another user's password by clicking Reset Password from the User's menu.



Reset another user's Password

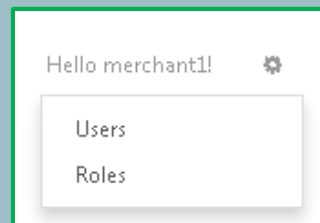
Login to the merchant account

Click the Gear icon next to the Name and select Users

Locate the User in question

Click Reset Password

An email with a password reset link will be sent to the user's email on file



Adding a user to my VT account

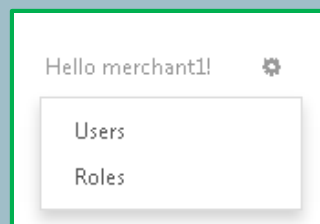
Login to your account

Click the Gear icon next to your Name and select Users

Click "+Create New"

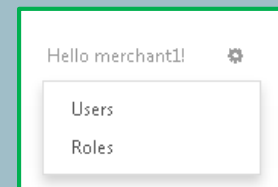
Enter the user's information and click "Save"

An activation email will be sent to the provided email address



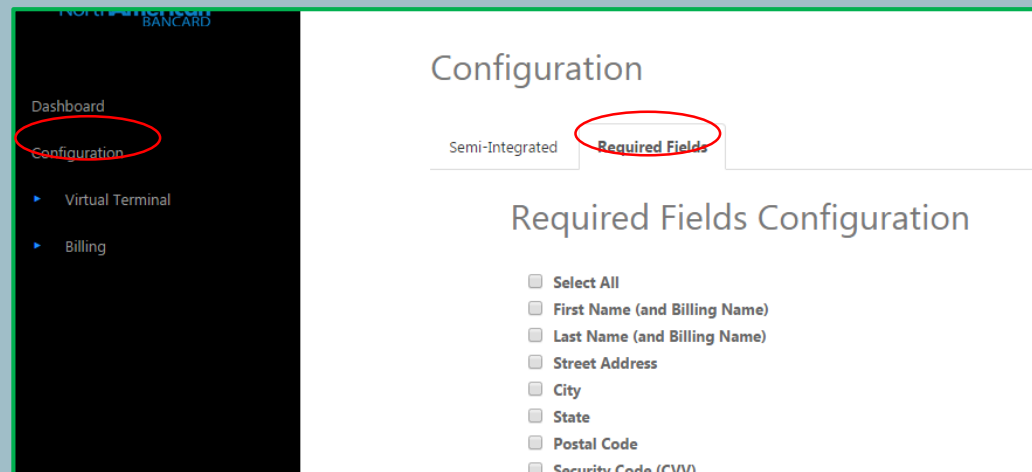
Deleting a user from my VT account

- Login to your account
- Click the Gear icon next to your Name and select Users
- Click the User Name you wish to delete
- Click "Delete"



Configuring required fields

- Click "Configuration"
- Click "Required Fields" tab
- Check what fields you'd like to require
- Click Save



Transaction processing

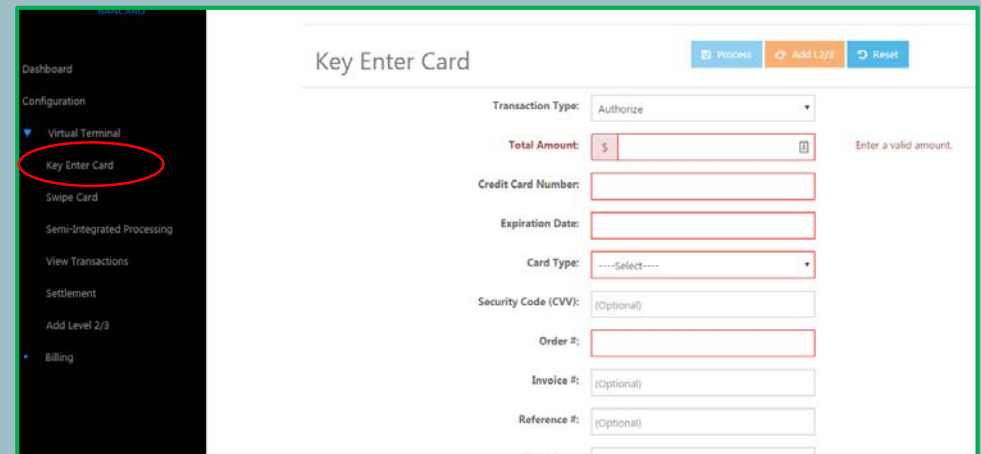
What is the difference between Authorize and AuthorizeAndCapture?

Authorize: it holds the funds in a pending status only, *it requires the merchant to run a Capture in order for the funds to settle.*

AuthorizeAndCapture: it authorizes and Captures the funds in one step. No further action is needed for the funds to settle.

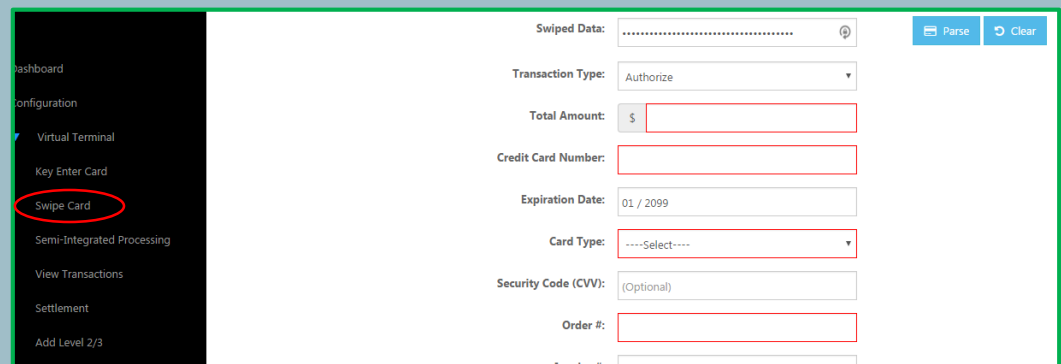
Processing a keyed transactions with VT

- Click "Virtual Terminal"
- Click "Key Card"
- Select transaction type from Transaction Type dropdown menu
- Input transaction information
- Click "Process"
- Confirm the transaction to be directed to the Transaction Details Screen



Processing a swiped transactions with VT

- Click "Virtual Terminal"
- Click "Swipe Card"
- Select transaction type from Transaction Type dropdown menu
- Swipe the card through the USB reader
- Input transaction information
- Click "Process"
- Confirm the transaction to be directed to the Transaction Details Screen



Setting up the Ingenico terminals with VT

Click "Configuration"

Click "Semi-Integrated" tab

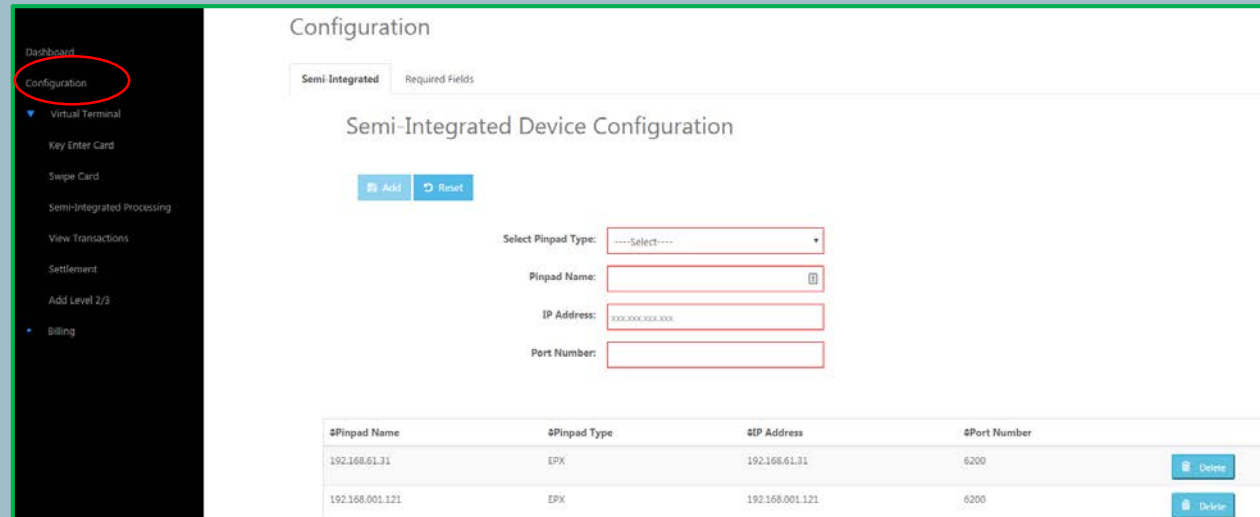
Select "EPX" from Pinpad Type dropdown menu

Enter the Pinpad Name

Enter the IP address that have been configured into the terminal
(Refer to the VT_SI guide for the instruction)

Enter "6200" for Port Number

Click "Add" to complete the setup



Configuration

Semi-Integrated Required Fields

Semi-Integrated Device Configuration

[Add](#) [Reset](#)

Select Pinpad Type:

Pinpad Name:

IP Address:

Port Number:

#Pinpad Name	#Pinpad Type	#IP Address	#Port Number	
192.168.61.31	EPX	192.168.61.31	6200	Delete
192.168.001.121	EPX	192.168.001.121	6200	Delete

Processing an EMV transaction with VT?

Click "Virtual Terminal"

Click "Semi-Integrated Processing"

Select the desired pinpad from the Pinpad dropdown

Select Transaction Class (Credit/Debit)

Select the transaction type from the Transaction Type dropdown

Enter Amount

Enter any additional data

Click "Process" to complete the transaction

Refer to page 12 for a complete EMV step by step setup guide

Transaction lookup and secondary transactions

-Transaction Lookup in VT

- Click "Virtual Terminal"
- Click "View Transactions"
- Set your search criteria
- Click "Process"
- Locate the transaction in question
- Click the Transaction ID
- You will be directed to the Transaction Details Screen

-How do I Capture a transaction?

- Click "Virtual Terminal"
- Click "View Transactions"
- Set your search criteria
- Click "Process"
- Locate the transaction in question
- Click the Transaction ID
- You will be directed to the Transaction Details Screen

- Click "Capture"
- Input the final Captured amount
- Click "OK"

- Confirm the transaction to be directed to the Transaction Details Screen

-How do I Void a transaction?

- Click "Virtual Terminal"
- Click "View Transactions"
- Set your search criteria
- Click "Process"
- Locate the transaction in question
- Click the Transaction ID
- You will be directed to the Transaction Details Screen
- Click "Void"
- Click "OK"
- Confirm the transaction to be directed to the Transaction Details Screen

Returning a transaction

Click "Virtual Terminal"
Click "View Transactions"
Set your search criteria
Click "Process"
Locate the transaction in question
Click the Transaction ID
You will be directed to the Transaction Details Screen
Click "Return"
Input the amount you wish to be Returned
Click "OK"
Confirm the transaction to be directed to the Transaction Details Screen

Processing a Level 2/3 transactions with VT

Click "Virtual Terminal"
Click "Key Card" or "Swiped Card"
Select the Transaction Type from the dropdown menu
Input card and transaction information
Click "Add L2/3"
Input Level 2 data
If you wish to provide level 3 data click "Level 3 Data"
Click "Process" when ready
Confirm the transaction to be directed to the Transaction Details Screen

Adjusting a transaction

Click "Virtual Terminal"
Click "View Transactions"
Set your search criteria
Click "Process"
Locate the transaction in question
Click the Transaction ID
You will be directed to the Transaction Details Screen
Click "Adjust"
Input the amount you wish to be Adjust by
Click "OK"
Confirm the transaction to be directed to the Transaction Details Screen

Capturing a Level 2/3 transactions with VT

Click "Virtual Terminal"
Click "Add Level 2/3"
Locate the transaction in question
Click "Add L2/3"
Input Level 2 data
If you wish to provide level 3 data click "Level 3 Data"
Click "Process" when ready
Confirm the transaction to be directed to the Transaction Details Screen

Subscription Billing

Create a Subscription

Click Create "Subscription" from the left hand menu

The following is required to create a subscription:

Amount: The amount to be charged on the billing date

Weekly/Bi-Weekly/Monthly: How often is the card to be charged

Credit Card Number/Expiration: Card data to be used for the subscription

Service Start Date: The subscription start date

Number of Payments: Number payments after which the subscription expires

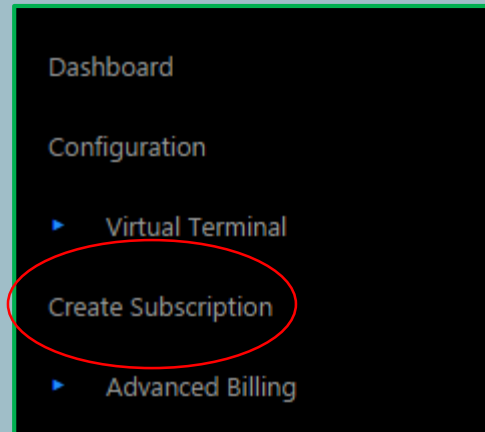
Never Expires: Subscription will continue running until canceled manually

First/Last Name: Name to be associated with the subscription

Email: Email to receive confirmation/payment receipts.

Street/City/State/PostalCode/Country: Address associated with the credit card to be used with the subscription

AVS Override: Creates a subscription even if the provided address is incorrect



Example

To create a subscription for \$50.00 that charges twice a month for 1 year you'll need to populate the data as follow:

Create Subscription

Back Create Reset

Amount:	<input type="text" value="\$ 50.00"/>	<input type="radio"/> Weekly	<input checked="" type="radio"/> Bi-Weekly	<input type="radio"/> Monthly
Credit Card Number:	<input type="text" value="4111 1111 1111 1111"/>	Expiration Date:	<input type="text" value="03 / 20"/>	
Service Start Date	<input type="text" value="Jan 09, 2017"/>	Number Of Payments:	<input type="text" value="24"/>	Never Expires: <input type="checkbox"/>
First Name:	<input type="text" value="john"/>	Last Name:	<input type="text" value="smith"/>	
Email:	<input type="text" value="test@email.com"/>	Street Address:	<input type="text" value="123 street"/>	
City:	<input type="text" value="city"/>	State:	<input type="text" value="Alabama"/>	
Postal Code:	<input type="text" value="12345"/>	Country:	<input type="text" value="United States"/>	
AVS Override:	<input type="checkbox"/>			

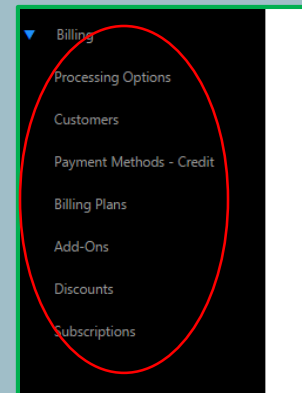
Advanced Subscription Billing

If you'd like to add a trail period, discounts, or add-ons use the Advanced Subscription menu

Creating a Recurring Subscription Plan?

To Create a Recurring Subscription the following needs to be added:

- Customer
- Payment Method
- Billing Plan
- Add-Ons/Discounts (optional)
- Subscription



Adding a Customer

Click "Advanced Billing"
Select "Customers"
Click "Create New"
Fill out the Customer Data form
Click "Save"

Adding a payment method

Click "Advance Billing"
Select "Payment Methods"
Select a customer from the list
Click "Create New"
Fill out the Payment Method form
Click "Save"

Adding a Billing Plan

Click "Advance Billing"
Select "Billing Plans"
Click "Create New"
Fill out the Billing Plan form
Click "Save"

Adding a Subscription

Click "Subscriptions"
Click "Create New"
Go to the "Subscription" tab
Add a Customer and a Payment Method from the list
Go to the "Plan" tab
Add a Plan from the list
Select ONLY ONE start billing date option
Add Add-Ons/Discounts (optional)
Click "Save"

Subscription Billing – Optional Operations

Adding Add-Ons/Discounts (Optional)

- Click "Billing"
- Click "Add-Ons/Discounts"
- Click "Create New"
- Fill out the Add-Ons/Discounts form
- Click "Save"

Merchant Location: Alex Location | Designated Terminal: Terminal 1 | Payment Profile: Bancard

New Add-on

Reference ID:

Addon Name:

Description:

Amount: \$

Number Of Cycles:

Never Expires:

Active:

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One-time Manual Charge

- Click "Billing"
- Select "Payment Methods"
- Select a Payment Method from the list
- Click "Charge"
- Enter Amount
- Click "Process"

Select Customers: first last

ID	Customer ID	Cardholder Name	Card Type	Account Number	Expiration	Active
38bc8c90-3255-4930-a76c-e5d0cb79903c	15e9791f-5524-4ebb-82e8-71e60465b18c	Bob Smith	Visa	1111	12/ 21	<input checked="" type="checkbox"/>

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Settlement

Initiating settlement

Click "Virtual Terminal"

Click "Settlement"

A list of transactions and a summary Matrix will be displayed

Click "Close Batch" to settle the batch

Configuration

- Virtual Terminal
- Key Enter Card
- Swipe Card
- Semi-Integrated Processing
- View Transactions
- Settlement

	Sales	Refunds	Net
Transactions:	12	4	8
Amount:	\$139.40	\$8.00	\$131.40

Close Batch

Open Batch Transactions

Transaction ID	Txn Type
B6D9B45AD62D468694ACA7B0778A42D2	Return
20860BAC0EDA4BB8AF84A86D42354927	Return

Setting specific transactions

Capture Selective is not available on all accounts

Click "Virtual Terminal"

Click ""

Select "Capture Selective"

Uncheck any transaction you'd like to leave out of the current batch

Click "Close Batch"

Settlement

	Sales	Refunds	Net
Transactions:	3	0	3
Amount:	\$164.51	\$0.00	\$164.51

Capture All

Capture Selective

Close Batch

Open Batch Transactions

Transaction ID	Txn Type	Auth Amount	Last 4	Card Type	Timestamp	Capture Amount	
0DE840F481EB41BDA238F880DE3F8D61	Adjust	\$ 35.94	1724	MasterCard	1/09/17 12:44 PM -0700	\$ 35.94	<input type="checkbox"/>
125D2101EC394B848120DD820EDC8ED6	Adjust	\$ 27.53	3735	Visa	1/09/17 12:26 PM -0700	\$ 27.53	<input type="checkbox"/>
25698608B37A44E59AD9614A415A0519	Adjust	\$ 78.09	1019	AmericanExpress	1/09/17 11:51 AM -0700	\$ 78.09	<input checked="" type="checkbox"/>
77880C4524184AB894FE74E56EC2CDF	Adjust	\$ 28.59	5002	Visa	1/09/17 10:59 AM -0700	\$ 28.59	<input checked="" type="checkbox"/>
ESCDC748920240939048034F2901CF77	Adjust	\$ 57.83	7784	Visa	1/09/17 10:37 AM -0700	\$ 57.83	<input checked="" type="checkbox"/>

10 20 50 100

Adjusting a transaction amount during settlement

Amount adjustment during settlement is only available for

Capture Selective enabled accounts

Click “Virtual Terminal”

Click “Settlement”

Select “Capture Selective”

Locate the transaction in questions and enter the new captured amount

Click “Close Batch”

Open Batch Transactions

5 selected transactions

Transaction ID	Txn Type	Auth Amount	Last 4	Card Type	Timestamp	Void	Capture Amount	Check
6DE840F481EB41BDA238F88DDE3F8D61	Adjust	\$ 35.94	1724	MasterCard	1/09/17 12:44 PM -0700	Void	\$ 35.94	<input checked="" type="checkbox"/>
125D2101EC394B84812DDD820EDC8ED6	Adjust	\$ 27.53	3735	Visa	1/09/17 12:26 PM -0700	Void	\$ 27.53	<input checked="" type="checkbox"/>
2569860BB37A44E59AD9614A41SA0519	Adjust	\$ 78.09	1019	AmericanExpress	1/09/17 11:51 AM -0700	Void	\$ 78.09	<input checked="" type="checkbox"/>
77880C4524184AB894FFE74E56EC2CDF	Adjust	\$ 28.59	5002	Visa	1/09/17 10:59 AM -0700	Void	\$ 28.59	<input checked="" type="checkbox"/>
E5CDC748920240939048034F2901CF77	Adjust	\$ 57.83	7784	Visa	1/09/17 10:37 AM -0700	Void	\$ 57.83	<input checked="" type="checkbox"/>

10 20 50 100

Voiding a transaction during settlement

Voiding a transaction during settlement is only available for

Capture Selective enabled accounts

Click “Virtual Terminal”

Click “Settlement”

Select “Capture Selective”

Locate the transaction in questions and click Void

Click “Close Batch”

Open Batch Transactions

5 selected transactions

Transaction ID	Txn Type	Auth Amount	Last 4	Card Type	Timestamp	Void	Capture Amount	Check
6DE840F481EB41BDA238F88DDE3F8D61	Adjust	\$ 35.94	1724	MasterCard	1/09/17 12:44 PM -0700	Void	\$ 35.94	<input checked="" type="checkbox"/>
125D2101EC394B84812DDD820EDC8ED6	Adjust	\$ 27.53	3735	Visa	1/09/17 12:26 PM -0700	Void	\$ 27.53	<input checked="" type="checkbox"/>
2569860BB37A44E59AD9614A41SA0519	Adjust	\$ 78.09	1019	AmericanExpress	1/09/17 11:51 AM -0700	Void	\$ 78.09	<input checked="" type="checkbox"/>
77880C4524184AB894FFE74E56EC2CDF	Adjust	\$ 28.59	5002	Visa	1/09/17 10:59 AM -0700	Void	\$ 28.59	<input checked="" type="checkbox"/>
E5CDC748920240939048034F2901CF77	Adjust	\$ 57.83	7784	Visa	1/09/17 10:37 AM -0700	Void	\$ 57.83	<input checked="" type="checkbox"/>

10 20 50 100

How do I view Batch Reports?

Click "Virtual Terminal"

Click "Batch Reports"

Locate the batch in question and click the Batch ID to view the batch details

Click "Export" to download the batch Report which contains transaction detail

Dashboard

Configuration

- Virtual Terminal
- Key Enter Card
- Swipe Card
- Semi-Integrated Processing
- View Transactions
- Settlement
- Add Level 2/3
- Batch Reports

Batch List Refresh

From: Dec 31, 2016 To: Jan 10, 2017 Q

Batch ID	Txn ID	Net Amount	Net Count	Capture Date
108227	42894F4852494892B086732CE08F5792	\$ 528.87	12	1/10/17 04:04 AM -0700
107716	67AC3F591F154252889744CC489925D2	\$ 783.51	20	1/09/17 04:03 AM -0700
107216	036CAF16BA06483396C0DE5FFF5DBFCD	\$ 2,323.77	57	1/08/17 04:02 AM -0700
106703	48ECCC21A88A408EAF0E5F0884F86CA9	\$ 2,822.98	61	1/07/17 04:01 AM -0700
106186	6D7CC62DC0CC403EBD6AF6A19D19D655	\$ 1,148.62	30	1/06/17 04:00 AM -0700
105682	ACF413B1A499474987129C8D88FC09A4	\$ 1,555.11	41	1/05/17 04:04 AM -0700
105183	BEBAEB3A792F496C827755877FAF5A1C	\$ 918.73	28	1/04/17 10:06 AM -0700
104684	3AA2FE100FA43A0852603B482DAD71F	\$ 973.89	20	1/03/17 04:02 AM -0700
103811	84F291E97F6A40DD81BE3288C666D07C	\$ 2,740.91	55	1/01/17 04:04 AM -0700
103338	4A62597E3E2248CD980485C486EAC78D	\$ 3,175.35	71	12/31/16 04:01 AM -0700

10 20 50 100

Batch View Back

Batch ID: 108227

Transaction ID: 42894F4852494892B086732CE08F5792

Batch Date/Time: 1/10/17 04:04 AM -0700

Batch State: Captured

Batch Report

	Amount	Count
Sales Totals	\$ 528.87	12
Cash Back Totals	\$ 0.00	0
Return Totals	\$ 0.00	0
Void Totals	\$ 0.00	0
PIN-Debit Sales	\$ 0.00	0
PIN-Debit Returns	\$ 0.00	0
Net Totals	\$ 528.87	12

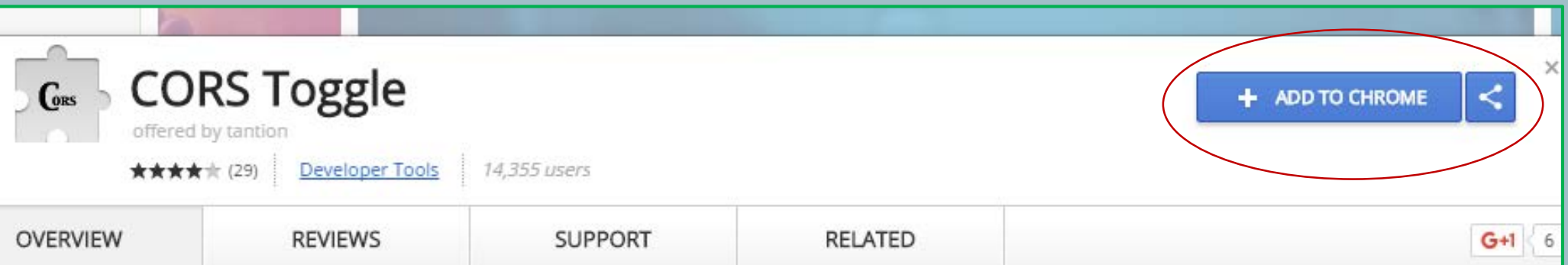
Virtual Terminal Semi-Integrated

The Velocity Virtual Terminal lets merchants instantly process transactions from any place on any device so long as it has a secure internet connection. Simply add the Ingenico terminal to the local area network, and entitle the virtual terminal to the Ingenico's IP address. Merchants can configure more than one Ingenico terminal to a virtual terminal account allowing them to have multiple stations. Once configured, the merchant is now capable of taking on chip credit cards and debit card transactions from the comfort of their favorite internet-enabled device without a point-of-sale terminal.

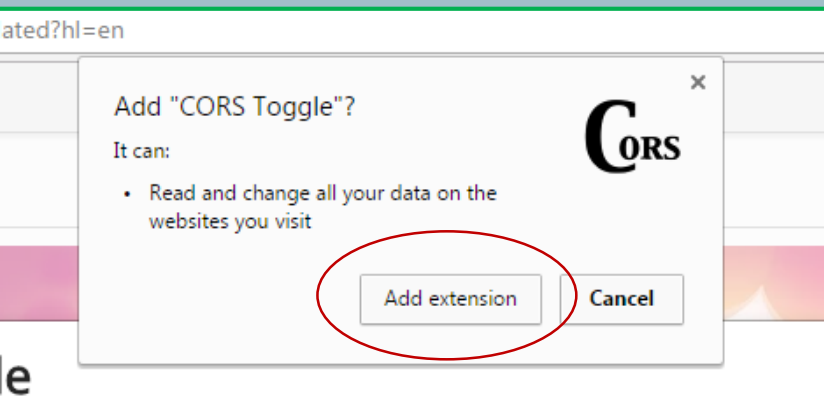
First time configuration for Chrome

First time users of the SI solution on the Virtual Terminal will be required to download the CORS Toggle extension for Google Chrome from the Chrome Web Store:

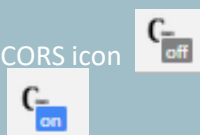
CORS Toggle: <https://chrome.google.com/webstore/detail/cors-toggle/omcncfnpmcabckcddookmnajignpffnh?hl=en>



Click "Add extension"



To enable the CORS extension after the installation is completed click the CORS icon in the upper right corner in Google Chrome and ensure that it's turned on



Adding the Ingenico Terminal to VT

- Select Configuration
- From the Select Pinpad Type drop down menu select "EPX"
- Enter a Pinpad Name
- Enter the IP Address acquired previously
- Enter 6200 in Port Number
- Click "Add"

Merchant Location: Alex Test Location 1 | Designated Terminal: Terminal 1 | Payment Profile: Bankcard

Configuration

Semi-Integrated | Required Fields

Semi-Integrated Device Configuration

[Add](#) [Reset](#)

Select Pinpad Type: ----Select----

Pinpad Name:

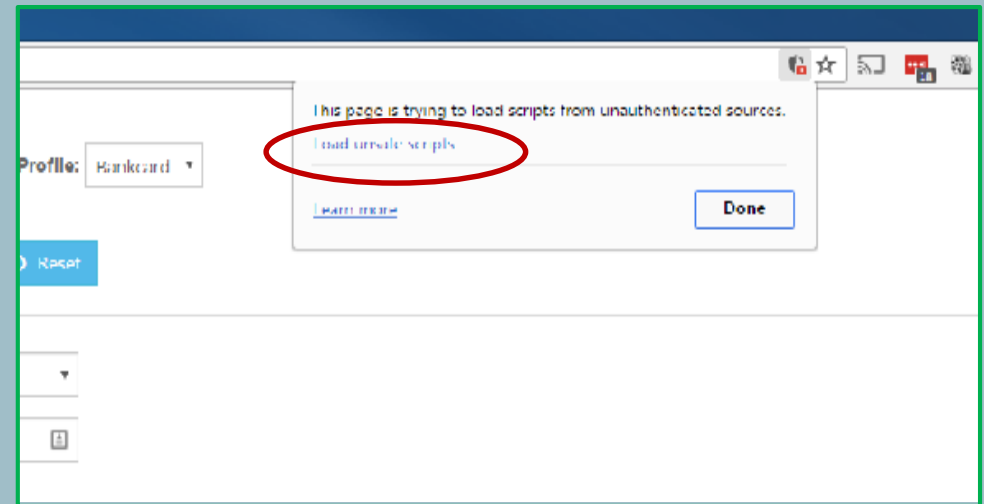
IP Address:

Port Number:

Pinpad Name	Pinpad Type	IP Address
192.168.61.31	EPX	192.168.61.31
192.168.001.121	EPX	192.168.001.121
192.168.001.122	EPX	192.168.001.122
192.168.137.206	EPX	192.168.137.206

First time users

When in the Semi-Integrated Processing screen a shield icon will be available for first time users and an existing user after clearing out their browser cache.
 Click the shield icon
 Click Load Scripts



Processing a transaction with SI-VT

Select Virtual Terminal
 Select Semi-Integrated Processing
 From the Select Pinpad drop down menu select a terminal from the list previously created
 Select Credit or Debit
 Select Transaction Type
 Enter Transaction Amount
 Enter any additional transaction data
 Click Process

