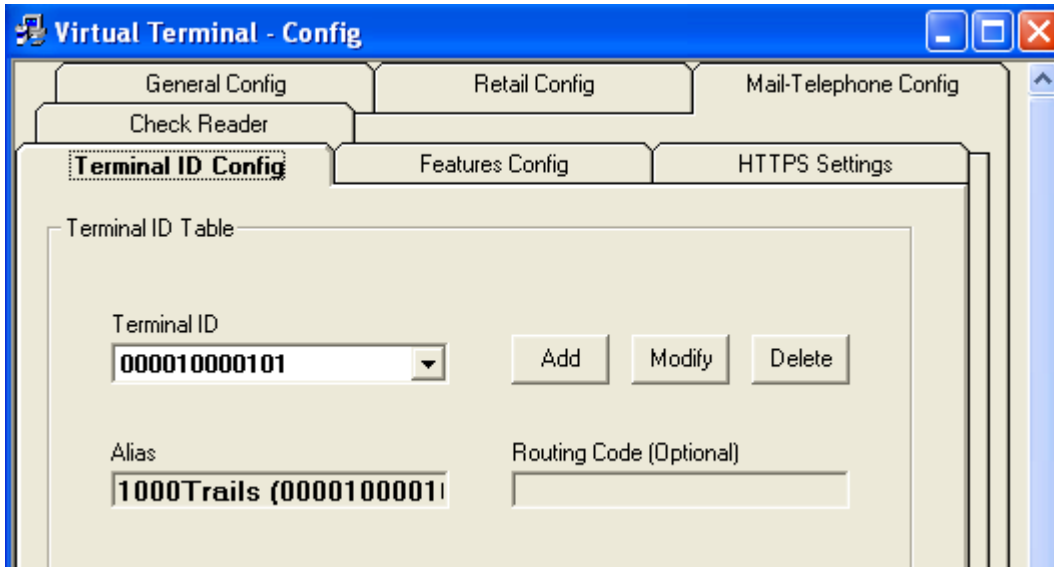


CONFIGURING VIRTUAL TERMINAL:

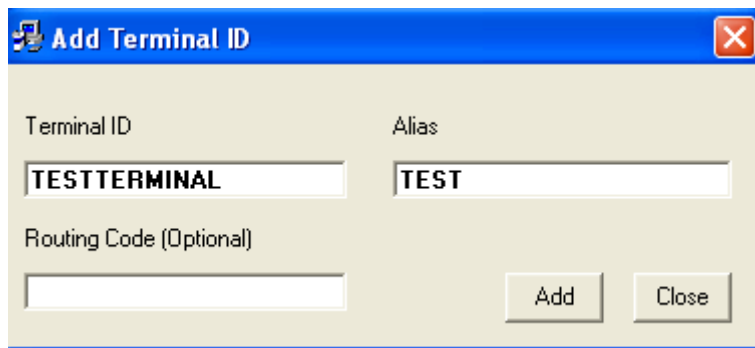
This is the screen you will see when you first open Virtual Terminal

The screenshot displays the 'Virtual Terminal - Retail' application window. The title bar reads 'Virtual Terminal - Retail' and the menu bar includes 'File', 'Options', 'Features', 'Passwords', 'Reports', and 'About'. On the left side, there is a vertical list of transaction types with radio buttons: SALE (selected), AUTH ONLY, FORCE, REFUND, VOID, CAPTURE, CHECK, CHECK VOID, CHECK REVERSAL, and INQUIRY. Below this list are logos for MasterCard and VISA. A button labeled 'ON Line Transactions' is positioned below the logos. At the bottom left of this section are 'Reprint Last' and 'Close' buttons. The main area is divided into two sections: 'Transaction Information' and 'Response Information'. The 'Transaction Information' section contains fields for CARD NUMBER (highlighted in green), EXPIRATION DATE (with a '(MMYY)' label), TOTAL AMOUNT, Tax Amount, Card Holder Name, Approval Code, Order Number, Transaction ID, User Data 1, User Data 2, and User Data 3. A 'PROCESS AS' dropdown menu is located below these fields. To the right of the EXPIRATION DATE field is a 'CW2' label and a corresponding input field. Below the 'Transaction Information' section are 'MANDATORY FIELDS' and buttons for 'Connect Reader' and 'Clear Fields'. The 'Response Information' section contains fields for Response / Status, Action Code, Authorization Code, and Response Transaction ID. A 'CW2 Response' label is positioned between the Action Code and Authorization Code fields. A 'Submit' button is located at the bottom right of the 'Response Information' section. The second screenshot shows the 'Options' menu open, with 'Configure' selected. The 'Options' menu items are: Terminal Type, Configure (Ctrl+N), Diagnostics (Ctrl+S), Get Card Number (Ctrl+G), and Close Batch Reporting (Ctrl+B). The background of the second screenshot shows the 'Transaction Information' section with the 'CARD NUMBER' field highlighted in green.

Before you begin you must configure the Options for Virtual Terminal. Click on the **Options** drop down menu and select **Configure**



You will see several tabs. Begin by clicking on the “Terminal ID Config” tab. When you see the above screen, click the **Add** button



This box is where you will input the Terminal ID that will identify your business. You should receive the Terminal ID either from your ISO, Jetpay Merchant Services, or the Jetpay Customer Service department.

Type in the Terminal ID (in all upper case) in the Terminal ID box above. The Terminal ID should always be 12 characters long.

The Alias box will control how this Terminal ID is displayed in Virtual Terminal and on transaction receipts. You can use your DBA name, or just your regular business name.

The Routing Code box is optional and should be left blank. Click **Add** to Save the Terminal ID and then click **Close** to exit this screen.

You should now see your Terminal ID and Alias on the “Terminal ID Config” tab.

The screenshot shows the 'Virtual Terminal - Config' window. The 'General Config' tab is selected. Under 'Terminal Behavior', the 'Startup Terminal' dropdown is set to 'Mail-Telephone Order'. Below it are text input fields for 'Merchant Name', 'Merchant GIF', and 'Merchant ICON', each with a browse button (...). The 'Receipt Format' section includes a 'Clear Fields' button and five text input fields labeled 'Receipt Header Line 1' through 'Receipt Header Line 4', and 'Receipt Trailer'. A checkbox 'Associate Terminal ID with Headers in the Receipt' is present. The 'Optional Features for Receipt' section contains six checkboxes: 'Order Number' (checked), 'Exp Date', 'User Data 2', 'Origin', 'User Data 1', and 'User Data 3'.

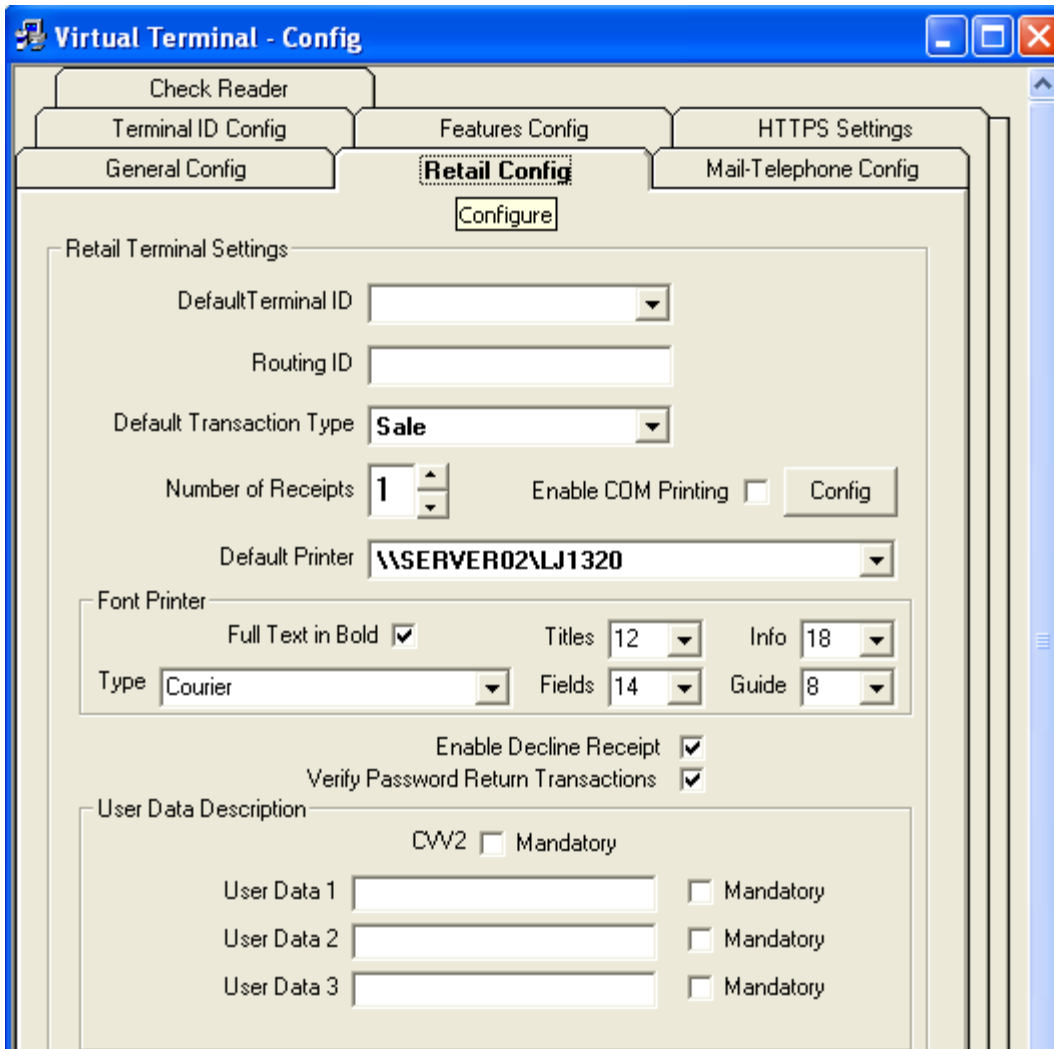
Next click on the “General Config” tab.

Startup Terminal- select “Retail” if most of your business is done face-to-face or select “Mail-Telephone Order” if most of your business is done via telephone or the internet.

Merchant Name/Merchant GIF/Merchant ICON- leave these fields blank.

Receipt Format- allows you to enter up to 4 lines of text that will appear at the top of your transaction receipts and one line of text at the bottom. You can use this space to identify your business, provide your address, telephone number, etc. This can be changed at any time by coming back into this tab.

Optional Features for Receipt- By checking any of these boxes, you are telling Virtual Terminal to display the data in these fields on transaction receipts.



Click on the “Retail Config” tab.

Default Terminal ID- click the drop down arrow and select the Alias that you inputted earlier on the Terminal ID tab.

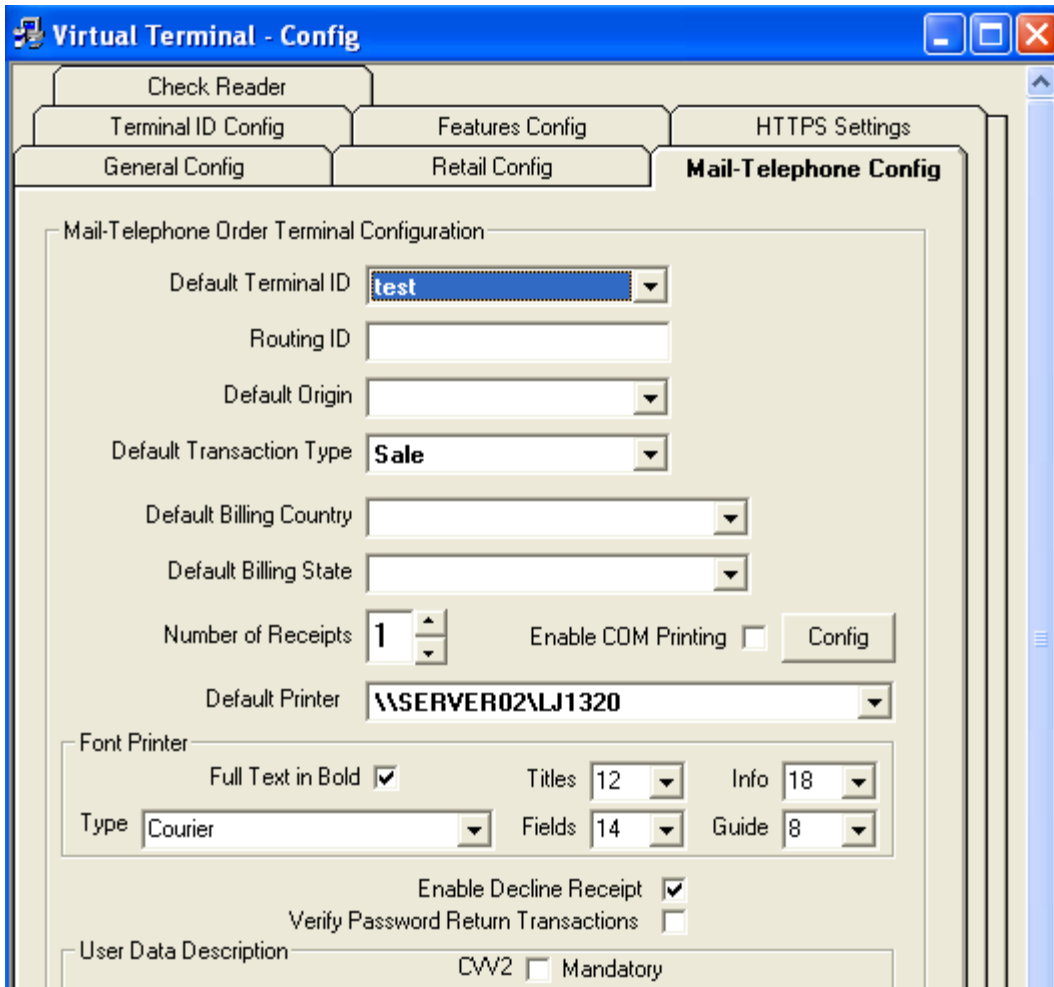
Routing ID- leave blank

Default Transaction Type- select the type of transaction you will be using most often.

Number of Receipts- select the number of receipts you wish Virtual Terminal to print.

Default Printer- click the drop down arrow and select the printer you want receipts to print to.

Enable Decline Receipt- check this little box if you want a receipt to print for Declined transactions (this option is NOT enabled by default).



Next click on the “Mail-Telephone Config” tab

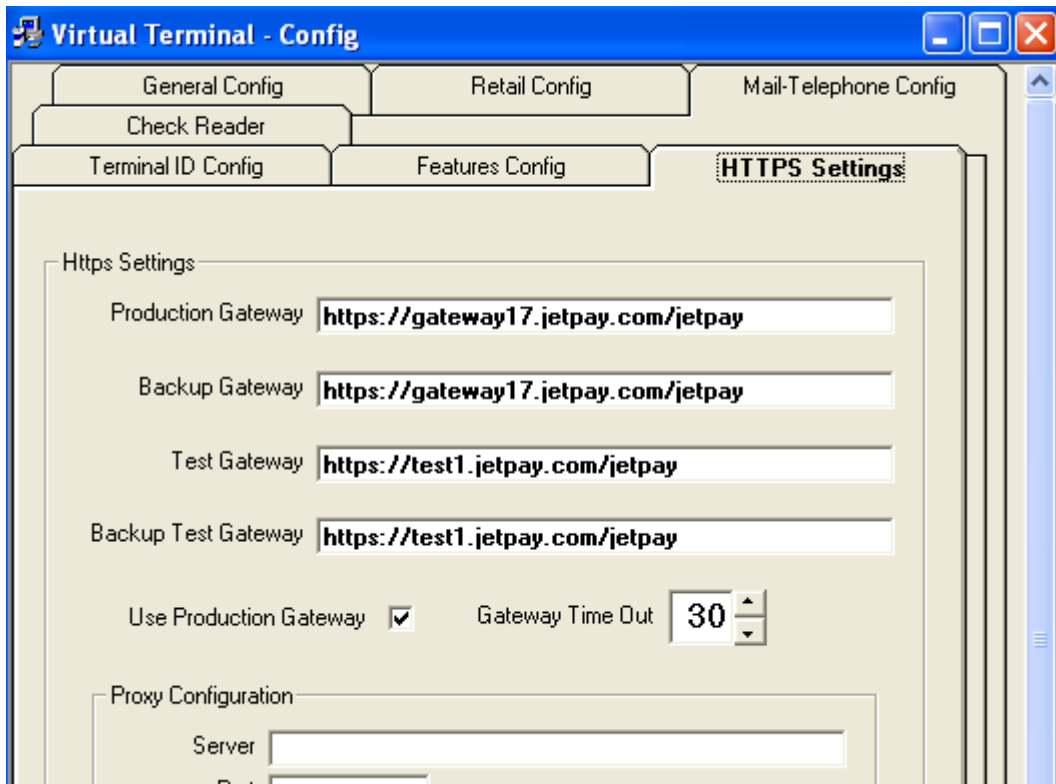
Default Terminal ID- click the drop down arrow and select the Alias that you inputted earlier on the Terminal ID tab

Default Transaction Type- select the type of transaction you will be using most often.

Number of Receipts- select the number of receipts you wish Virtual Terminal to print

Default Printer- click the drop down arrow and select the printer you want receipts to print to.

Enable Decline Receipt- check this little box if you want a receipt to print for Declined transactions (this option is NOT enabled by default).



Click on the HTTPS Settings tab.

The only change you will make here is to **UNCHECK** the box next to “Use Production Gateway”. By unchecking this box, you are telling Virtual Terminal to connect to our Test Gateway rather than the Production Gateway.



This will allow us to run a test transaction to confirm that everything has been configured correctly. It can also be used to practice running transactions in Virtual Terminal, for Training of staff, and to familiarize yourself with the program.

Click the **Apply** button in the lower right corner, and then click **OK**

Virtual Terminal - Retail ***** TESTING MODE *****

File Options Features Passwords Reports About

SALE
 AUTH ONLY
 FORCE
 REFUND
 VOID
 CAPTURE
 CHECK
 CHECK VOID
 CHECK REVERSAL
 INQUIRY

ON Line Transactions

Reprint Last Close

Transaction Information
CARD NUMBER
EXPIRATION DATE (MMYY) CW2
TOTAL AMOUNT
 Tax Amount
 Card Holder Name
 Approval Code
 Order Number
 Transaction ID
 User Data 1
 User Data 2
 User Data 3
PROCESS AS

MANDATORY FIELDS
 Connect Reader
 Clear Fields

Response Information
 Response / Status
 Action Code CW2 Response
 Authorization Code
 Response Transaction ID

TESTING MODE
 Submit

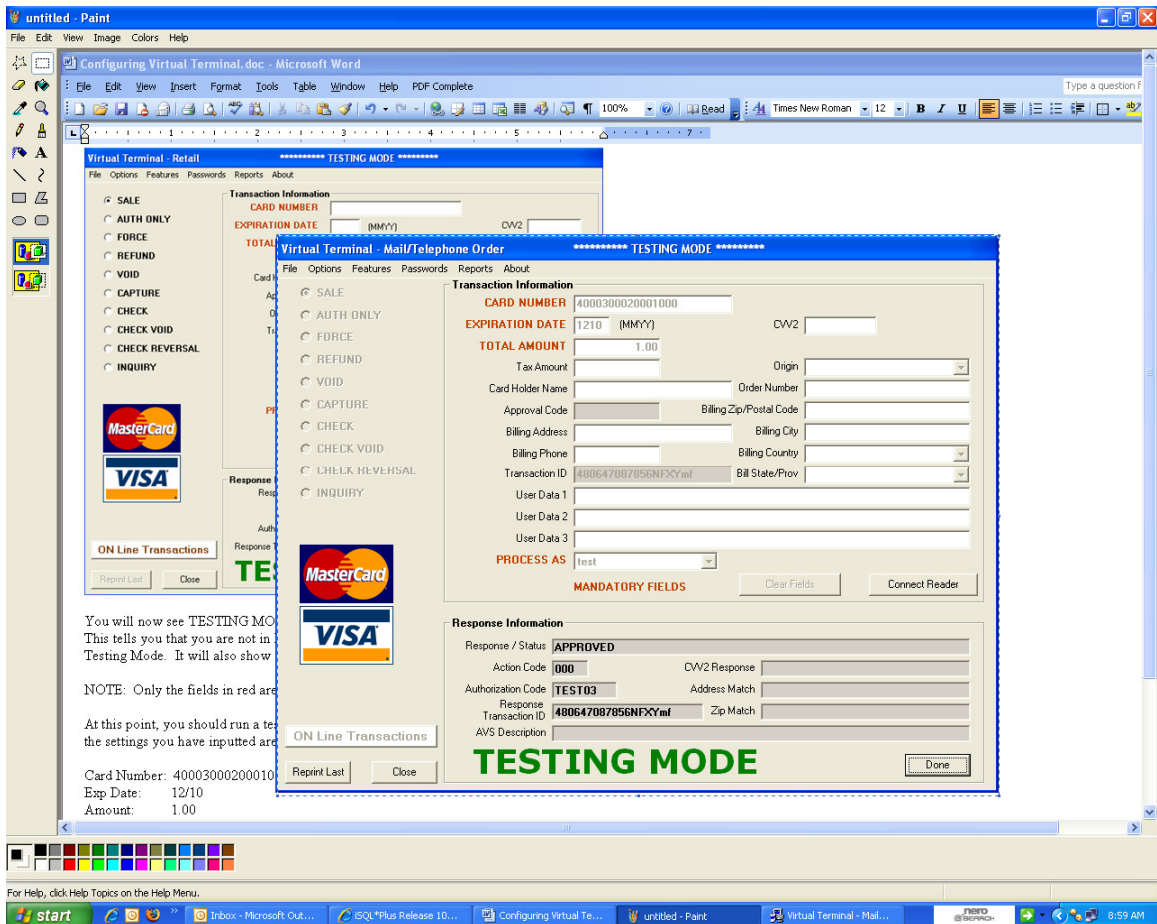
You will now see TESTING MODE in big green letters at the bottom of your screen. This tells you that you are not in Production Mode (live) but are currently running in Testing Mode. It will also show on the blue bar at the top of the screen.

NOTE: Only the fields in red are “required” to process a transaction.

At this point, you should run a test transaction using the following data to confirm that the settings you have inputted are correct.

Card Number: 4000300020001000
 Exp Date: 12/10
 Amount: 1.00

Click the **Submit** button to send the transaction.



The above screen shot shows what a completed transaction will look like.

Response/Status- tells you whether the transaction was Approved or why it was Declined.

Action Code- tells you whether it was successful (000) or if there was an error. If there was an error, Virtual Terminal will provide a 3 digit code to identify the error.

Authorization Code- this shows the approval code provided by the credit card company for that transaction.

Response Transaction ID- the Transaction ID for this transaction.

NOTE: You MUST click the **DONE** button in the bottom right hand corner of the screen to complete this transaction. Once you do so, Virtual Terminal will blank out the screen so that you can enter additional transactions.

FINAL NOTE: Remember to go back into Options-Config, HTTPS Settings tab, and to place the check mark back into the box next to “Use Production Gateway” when you are ready to begin processing real transactions in the Production Environment.

