

FIRST LOGIN and SETTING USER PERMISSIONS IN V.T.

Welcome to Virtual Terminal!

Create Initial Administrator Account

Administrator User ID:

NOTE: This password is temporary and you will be prompted to change it when you log in. Passwords are a minimum of 8 characters long and must contain at least 1 letter and 1 number. Valid characters are all upper and lower case letters, all numbers, and any of the following: !@#\$%^&*()~_+={ }[]<>.,?/.

Temporary Password:

Confirm Temporary Password:

User's Name:

Email (Optional):

The first time you launch Virtual Terminal after installing you will see the box above.

Administrator User ID: type **admin** (in lower case)
Temporary Password: type **passw0rd** (that is a zero, not an "O")
Confirm Temp Password: type **passw0rd** again
User's Name: type your name
Email: skip this step (not yet available in Production)

When you have completed the items above, click the **OK** button.

Virtual Terminal Login

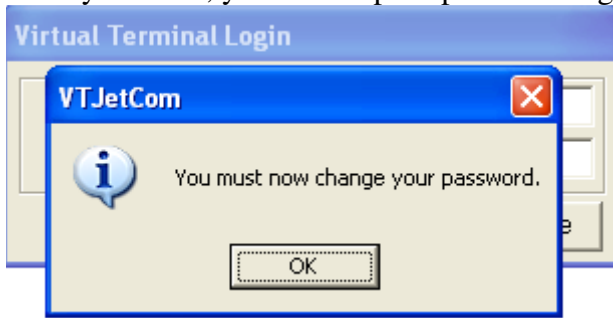
User ID:

Password:

You will see the login box above:

User ID: type **admin**
Password: type **passw0rd**

After you do so, you will be prompted to change your password:



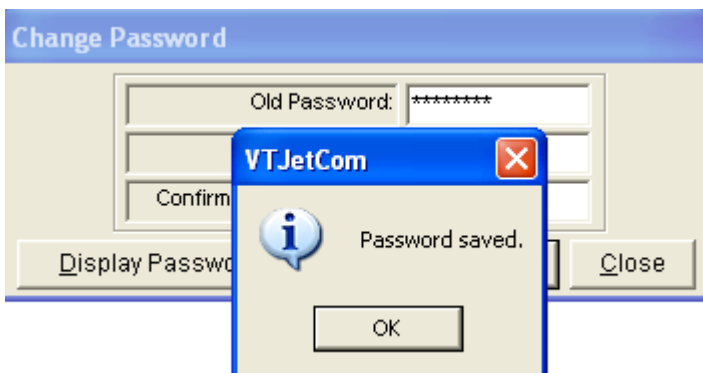
Click the **OK** button to proceed



You will want to input the following:

Old Password: type **passw0rd**
New Password make up a new password that **ONLY** you will know
Confirm New Password: type in your new password again.

NOTE: If you have questions about what is or is not a valid password, you can click the “**Display Password Rules/Info**” button for more information.



Click **OK** to proceed to the next step.

Virtual Terminal - Retail --- User: jason ***** TESTING MODE *****

File Options Features About

Transaction Information

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

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

MICR: -1 Clear Fields

Response Information

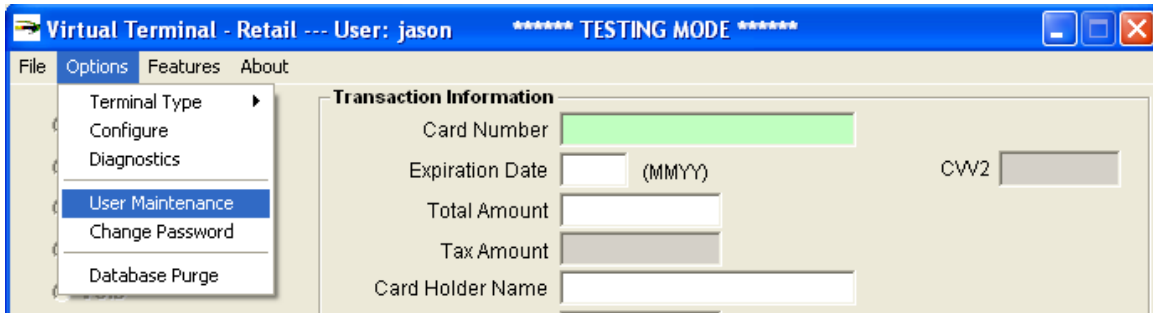
Response / Status
 Action Code CW2 Response
 Authorization Code
 Transaction ID

Reprint Last Close **TESTING MODE** Submit

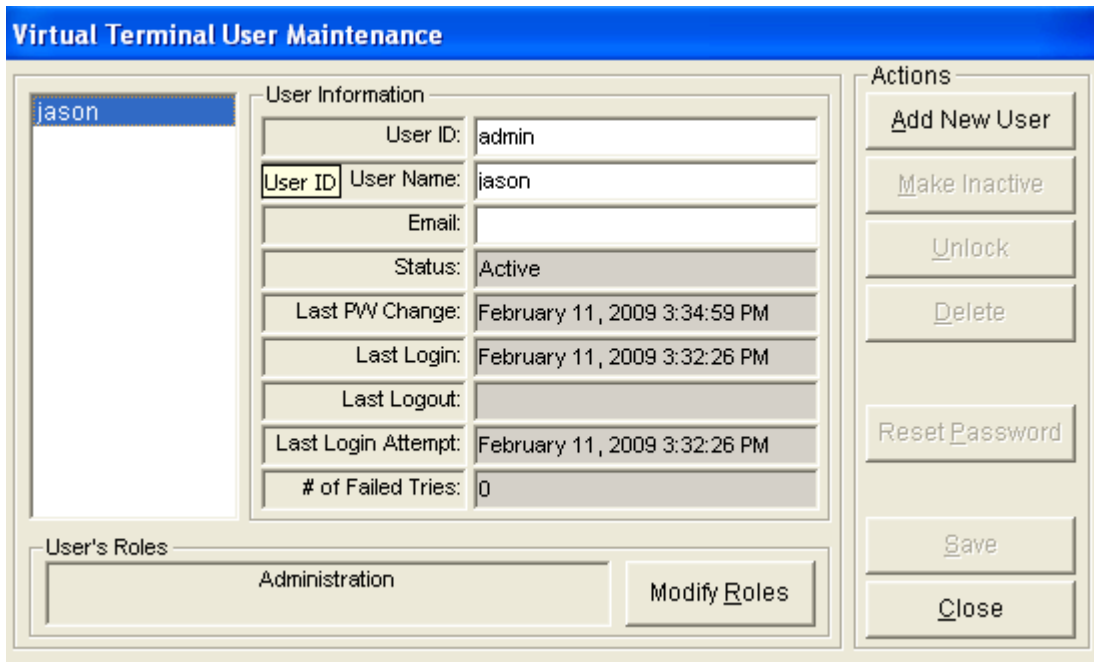
This is what the initial screen will look like in Virtual Terminal.

NOTE: You are currently in “Testing Mode” (indicated in big, green letters at the bottom of the screen and at the top on the blue program bar). Testing Mode is used not only for testing, but also for Training employees, and just getting the feel for Virtual Terminal.

NOTE#2: You can see the roles on the left hand side are all greyed out except for “Inquiry”. Even though this is the “Admin” account-you will have to assign rights and roles to each user, even the Admin.



On the drop down menu at the top of the screen click “**Options**” and then “**User Maintenance**” to access the User Maintenance window.



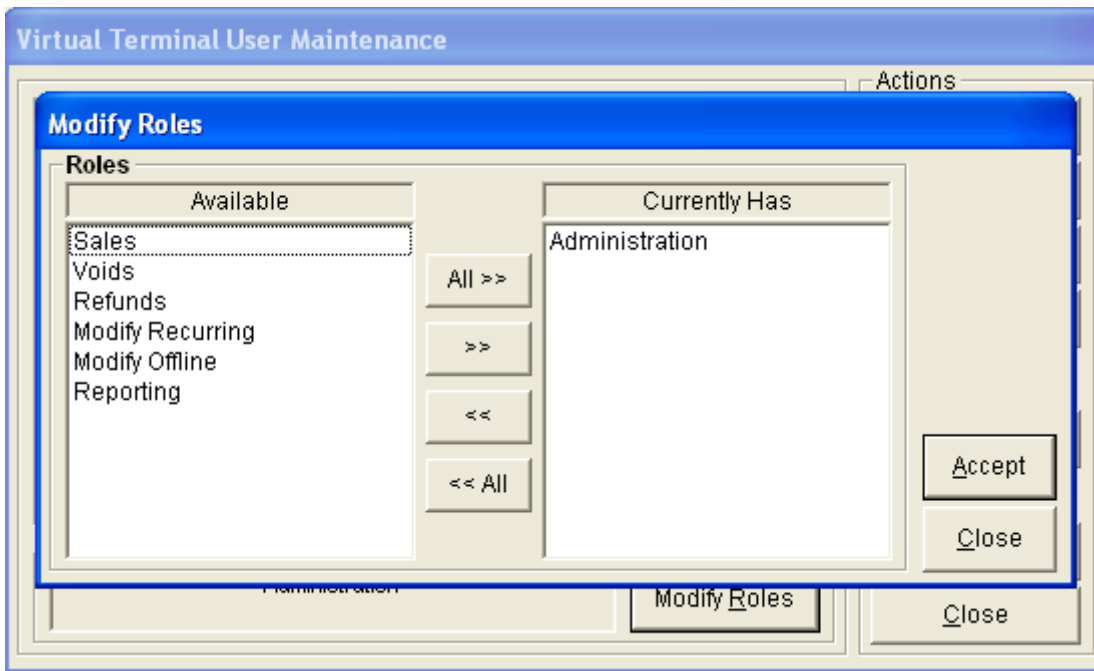
You will see the User Name you created on the left hand side.

NOTE: The User ID (what you log in with) is **admin** (not your name). You can use **admin** as the User Name and the User ID if that makes it easier to remember.

This screen is used to perform the following tasks:

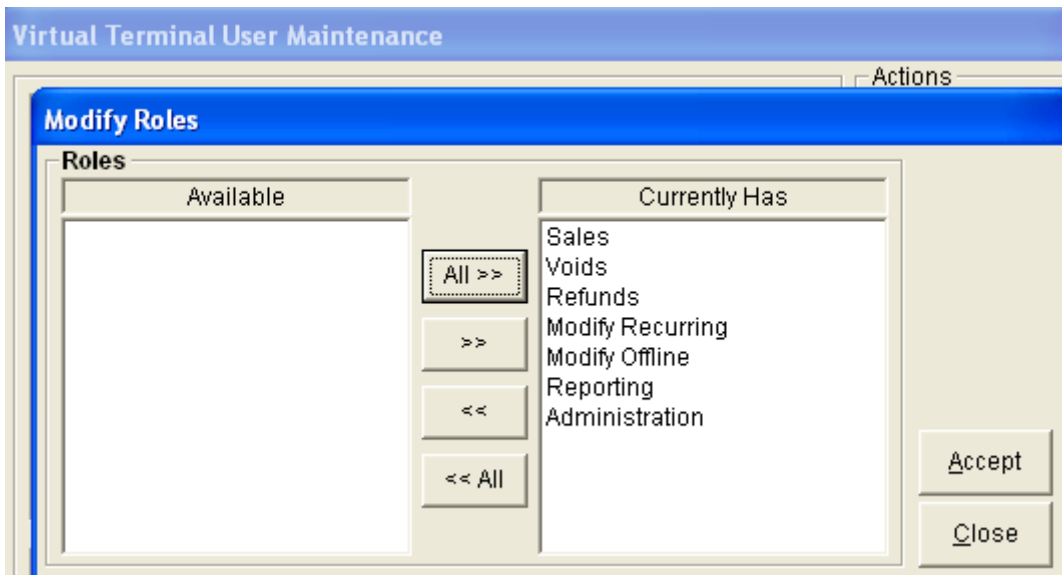
- 1) Give new users access to Virtual Terminal
- 2) Inactivate existing users
- 3) Delete users
- 4) Unlock users who have too many failed login attempts
- 5) Reset user passwords
- 6) Modify Roles (to adjust roles and rights)

We are going to click the “**Modify Roles**” button to adjust the permissions for the Admin account we have already created.

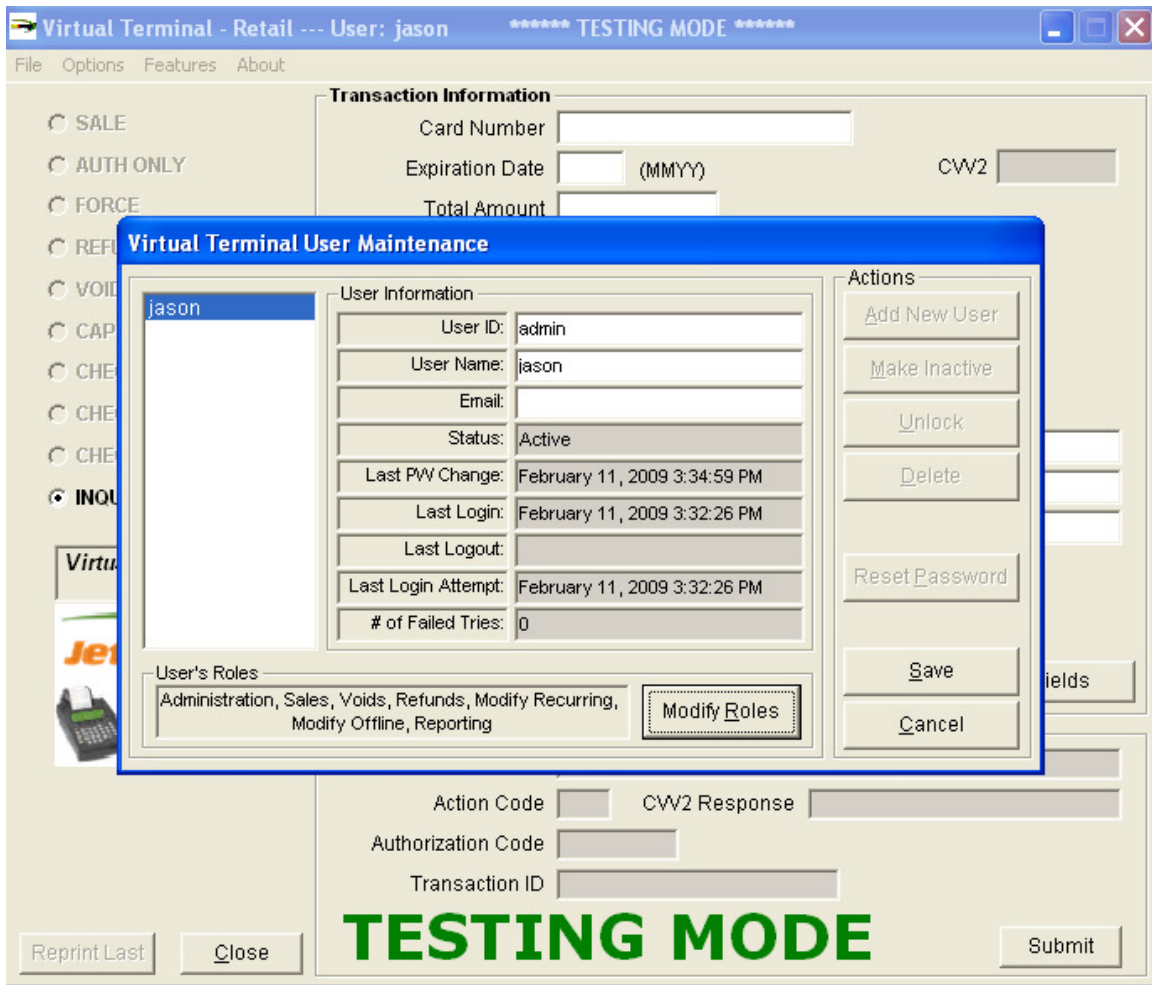


The left hand box shows what Roles are available to assign to this User.
The right hand box shows what Roles are already assigned to that User.

Since this is the Admin account, we recommend that you assign ALL Roles to this User.
You can either click on the Available roles one at a time OR click the “All>>” button which will assign ALL roles to this User.



Click “Accept” to save the changes.



You will return to the User Maintenance screen. Be SURE that you click the Save button to retain the changes you have made to the Roles of the Admin account!

You can Add additional users now (and assign roles to each user) OR you can move on to Configuring Virtual Terminal by clicking the “Close” button.

FINAL NOTE:

MAKE SURE THAT YOU REMEMBER YOUR ADMIN USER ID AND PASSWORD! WE HAVE NO WAY OF RETRIEVING THESE IF YOU LOSE THEM!