



REPORTING TOOL USER GUIDE

TERMINAL

2016

VERSION 1.0



IRL: +353 (0) 1 907 5499

UK: +44 (0) 20 3564 5695

support@elavonpaymentgateway.com

TABLE OF CONTENTS

1. PROCESSING A TRANSACTION	3
1.1 SALE	3
1.2 REFUND	5
1.3 MANUAL	6
1.4 CARD VERIFICATION	7
2. EXPLANATION OF TERMINAL FIELDS	8

REPORTING TOOL USER GUIDE

1. PROCESSING A TRANSACTION

In order to process a transaction in the reporting tool you will need to go to the **'Terminal'** section. This can be found within the navigation menu to the left of the dashboard.

The screenshot shows the 'Terminal' page in the Elavon reporting tool. On the left is a navigation menu with sections: MENU (Dashboard, Transactions, Customers, Terminal, Fraud Management, Settled, Reports), QUICK LINKS (Pending, Delayed, Held, Voided, Failed), and ADMINISTRATION (Client Settings, User Management). The main content area is titled 'TERMINAL' and contains a form for processing a transaction. The form is divided into three main sections: 'ORDER DETAILS' with fields for 'Type*' (set to 'Sale') and 'Account*' (dropdown); 'PAYMENT DETAILS' with fields for 'Order ID*' (with an 'Auto generate Order ID' button), 'Currency*', 'Amount*' (0.00), 'Cardholder Name*', 'Card Number*', 'Expiry Date*' (mm/yy), and 'Security Code*' (with a 'Not available' checkbox); and 'ADDITIONAL INFORMATION' with fields for 'Product ID', 'Customer Number', 'Variable Reference', and a large 'Comment' text area. Below these are sections for 'BILLING' and 'SHIPPING' (with a 'Same as Billing' checkbox). On the right side, a 'SUMMARY' box displays the merchant name 'new terran inc' and 'The Observatory GB', and a 'SALE TRANSACTION' of '0.00' dated '06/02/2017 at 16:50:26'. A blue 'PROCESS >' button is located below the summary.

The Terminal can be used to process card transactions including:

- Sales
- Refunds
- Manual Transactions
- Card Verification

1.1 SALE

In order to process a **'Sale'**, follow the steps below:

1. In the 'Type' field choose **'Sale'** from the dropdown menu.
2. To select a particular sub-account to process the transaction against, choose the **'Account'** from the dropdown menu. If you have a single sub-account this will be populated by default.
3. All fields marked with an * are mandatory and must be completed to process the transaction.
4. Once all mandatory fields are complete, click on 'Process'.

REPORTING TOOL USER GUIDE

The screenshot shows the Elavon reporting tool interface. At the top, there is a search bar with 'Quick Search: Choose Criteria' and 'Enter Keyword'. The user is logged in as 'new terran inc' with the email 'desafd@das'. The left sidebar contains a 'MENU' with options like Dashboard, Transactions, Customers, Terminal (selected), Fraud Management, Settled, and Reports. Below the menu are 'QUICK LINKS' (Pending, Delayed, Held, Voided, Failed) and 'ADMINISTRATION' (Client Settings, User Management). The main content area is titled 'TERMINAL' and contains several sections: 'ORDER DETAILS' with 'Type*' set to 'Sale' and 'Account*' set to 'Select Account'; 'PAYMENT DETAILS' with 'Order ID*', 'Currency*', and 'Amount*' (0.00) fields; 'Cardholder Name*', 'Card Number*', 'Expiry Date*', and 'Security Code*' (with a 'Not available' checkbox); and a checked box for 'Automatically Settle to the Bank'. The 'ADDITIONAL INFORMATION' section has 'Product ID', 'Customer Number', 'Variable Reference', and 'Comment' fields. At the bottom, there are 'BILLING' and 'SHIPPING' sections, with a 'Same as Billing' checkbox. On the right, a 'SUMMARY' box shows 'new terran inc', 'The Observatory', 'GB', and 'Merchant ID:'. Below this, a 'SALE TRANSACTION' box displays '0.00' and '06/02/2017 at 16:50:26'. A 'PROCESS >' button is at the bottom right.

5. The transaction result will display and the appropriate message will appear at the top of the 'Terminal' screen.

This screenshot is identical to the previous one, but with a green success message banner at the top. The banner reads: 'Sale Successful (ee96ac5548c547958180456ff) 175.00 EUR'. It includes details for 'Auth Code' (PP8888), 'Security Code' (Matched), 'AVS Postcode' (Not Checked), and 'AVS Address' (Not Checked). There are 'VIEW TRANSACTION' and 'PRINT RECEIPT' buttons on the right side of the banner. The rest of the interface, including the menu, form fields, and summary box, remains the same as in the previous screenshot.

REPORTING TOOL USER GUIDE

1.2 REFUND

To process a **Refund** you will need to have been assigned the role of **Administrator** or **Power User** to gain access to this section of the **Terminal**.

1. To process a refund, select **Refund** from the **Type** dropdown.
2. To select a particular sub-account, choose the sub-account from the **Account** dropdown. If you have a single sub-account this will be populated by default.
3. All fields marked with an * are mandatory and must be completed to process the transaction.
4. You will be required to enter your personal login password as this is a mandatory field.
5. Once all mandatory fields are complete, click on **Process**.
6. The transaction result will display and the appropriate message will appear at the top of the **Terminal** screen as seen in Section 1.1 above.

The screenshot displays the Elavon Terminal interface for processing a refund. The interface is divided into several sections:

- Header:** Elavon logo, Quick Search bar (Choose Criteria, Enter Keyword), and user information (new terran inc, desafd das).
- Left Sidebar:** MENU (Dashboard, Transactions, Customers, Terminal, Fraud Management, Settled, Reports), QUICK LINKS (Pending, Delayed, Held, Voided, Failed), and ADMINISTRATION (Client Settings, User Management).
- Terminal Form:**
 - ORDER DETAILS:** Type* (Refund), Account* (Select Account).
 - PAYMENT DETAILS:** Order ID* (Auto generate Order ID), Currency* (---), Amount* (0.00), Cardholder Name*, Card Number*, Expiry Date* (mm/yy), Security Code* (Not available).
 - REFUND PASSWORD:** Password*.
 - ADDITIONAL INFORMATION:** Product ID, Customer Number, Variable Reference, Comment.
- Summary Panel:** new terran inc, The Observatory, GB, Merchant ID, REFUND TRANSACTION, 0.00, 06/02/2017 at 16:53:49, PROCESS >

Note:

1. Please note that the refund option is not enabled by default on your account. For more information on this please contact Elavon Payment Gateway Support Team.
2. You need to have the full card number and expiry date to process a refund. If you do not have these details and the transaction is less than 180 days old, you should process a rebate. For more information on rebates, please see the Managing Transactions User Guide.

REPORTING TOOL USER GUIDE

1.3 MANUAL

To process a **'Manual'** transaction you will need to have been assigned the role of **'Administrator'** or **'Power User'** to gain access to this section of the Terminal.

Note: Manual transactions are not sent to the bank for authorisation, instead they are added directly to the days settlement file. To process a manual transaction you must contact your acquiring bank's authorisation centre by phone to obtain an authorisation code. Elavon payment Gateway requires written confirmation from your acquiring bank before this transaction type can be enabled on your account.

1. To process a manual transaction, select **'Manual'** from the **'Type'** dropdown.
2. To select a particular sub-account, choose the sub-account from the **'Account'** dropdown. If you have a single sub-account this will be populated by default.
3. All fields marked with an * are mandatory and must be completed to process the transaction.
4. A manual transaction requires you to input a two to six digit alphanumeric code as evidence of authorisation. This code is entered in the **'Auth Code'** field as below:

The screenshot shows the Elavon Terminal interface. On the left is a navigation menu with sections: MENU (Dashboard, Transactions, Customers, Terminal, Fraud Management, Settled, Reports), QUICK LINKS (Pending, Delayed, Held, Voided, Failed), and ADMINISTRATION (Client Settings, User Management). The main content area is titled 'TERMINAL' and contains several sections: 'ORDER DETAILS' with 'Type*' set to 'Manual' and 'Account*' set to 'Select Account'; 'PAYMENT DETAILS' with 'Order ID*' (Auto generate Order ID), 'Currency*' (---), 'Amount*' (0.00), 'Cardholder Name*', 'Card Number*', 'Expiry Date*' (mm/yy), 'Security Code*' (with a 'Not available' checkbox), and 'Auth Code*'; a checked checkbox for 'Automatically Settle to the Bank'; and 'ADDITIONAL INFORMATION' with fields for 'Product ID', 'Customer Number', 'Variable Reference', and a 'Comment' text area. At the bottom, there are 'BILLING' and 'SHIPPING' sections, with 'SHIPPING' having a 'Same as Billing' checkbox. On the right, a 'SUMMARY' section displays 'new terran inc', 'The Observatory GB', 'Merchant ID:', 'MANUAL TRANSACTION', '0.00', and '06/02/2017 at 16:53:49', with a 'PROCESS >' button below. The top of the page includes the Elavon logo, a search bar, and user information 'new terran inc' and 'desafd das'.

5. Once all mandatory fields are complete, click on **'Process'**.
6. The transaction result will display and the appropriate message will appear at the top of the **'Terminal'** screen as seen in Section 1.1 above.

REPORTING TOOL USER GUIDE

1.4 CARD VERIFICATION

To process a **Card Verification** transaction you will need to have been assigned the role of **Administrator** or **Power User**. The **Card Verification** transaction type is used to check that a card is valid and active without authorising or holding funds.

Note: Card Verification is not supported by all acquiring banks, to determine if your acquiring bank supports card verification, please contact Elavon Payment Gateway Support Team for further information.

1. To process a card verification transaction, select **Card Verification** from the **Type** dropdown.
2. To select a particular sub-account, choose the sub-account from the **Account** dropdown. If you have a single sub-account this will be populated by default.
3. All fields marked with an * are mandatory and must be completed to process the transaction.
4. Once all mandatory fields are complete, click on **Process**.
5. The transaction result will display and the appropriate message will appear at the top of the **Terminal** screen as seen in Section 1.1 above.

The screenshot shows the Elavon Terminal interface for processing a Card Verification transaction. The interface is divided into several sections:

- Header:** Elavon logo, Quick Search (Choose Criteria, Enter Keyword), and user information (new terran inc, desafd das).
- MENU:** Dashboard, Transactions, Customers, Terminal (selected), Fraud Management, Settled, Reports.
- QUICK LINKS:** Pending, Delayed, Held, Voided, Failed.
- ADMINISTRATION:** Client Settings, User Management.
- TERMINAL:**
 - ORDER DETAILS:** Type* (Card Verification), Account* (Select Account).
 - PAYMENT DETAILS:** Order ID* (Auto generate Order ID), Cardholder Name*, Card Number*, Expiry Date* (mm/yy), Security Code* (Not available).
 - ADDITIONAL INFORMATION:** Product ID, Customer Number, Variable Reference, Comment.
 - BILLING:** (Selected)
 - SHIPPING:** Same as Billing
- SUMMARY:** new terran inc, The Observatory, GB. CARD VERIFICATION TRANSACTION, 06/02/2017 at 16:53:49. PROCESS >

REPORTING TOOL USER GUIDE

2. EXPLANATION OF TERMINAL FIELDS

Field	Description	Format	Length
Order ID	The Order ID must always be unique. For example, an invoice number can be used or a unique reference for the transaction.	a-z A-Z 0-9 _ -	1-40
Amount	The amount must never contain decimal places; it is in cent value i.e. to process 10.00, type 1000 for ALL currencies.	0-9	1-8
Card Number	The card number.	0-9	12-19
Customer Name	The card holder name.	a-z A-Z 0-9 " ' _	1-100
Security Code	Security code is the 3 digit number on the back of the card. If you don't have this you can select "No Code". Note: Amex Cards contain a 4 digit number on the back of the card.	0-9 ""	3-4
Comment 1	Free text field; can be used to store information that will be relevant for your own reconciliation/reporting purposes.	a-z A-Z 0-9 ' "+ " _ & \ / @ ! ? % () * : £ \$ & € # [] =	0-255
Customer Number	Free text field; can be used to store information that will be relevant for your own reconciliation/reporting purposes.	a-z A-Z 0-9 - "" _ . , + @	0-50
Product ID	Free text field; can be used to store information that will be relevant for your own reconciliation/reporting purposes.	a-z A-Z 0-9 - "" _ . , + @	0-50
Variable Ref	Free text field; can be used to store information that will be relevant for your own reconciliation/reporting purposes.	a-z A-Z 0-9 - "" _ . , + @	0-50
Shipping Code	Enter the Address Verification Service (AVS) shipping code. Note: Please note that AVS can only be used for UK customers.	a-z A-Z 0-9 "" . - /	0-30
Shipping Country	Select the shipping country from the drop down.	Predefined	Predefined
Billing Code	Enter the Address Verification Service (AVS) shipping code. Note: Please note that AVS can only be used for UK customers.	a-z A-Z 0-9 "" . - /	
Billing Country	Select the billing country from the drop down.	Predefined	Predefined



GOT ANY QUESTIONS?
LET US KNOW

SUPPORT

DUBLIN

+353 (0)1 907 5499

LONDON

+44 (0) 20 3564 5695

support@elavonpaymentgateway.com