

OmniFlex

A Worldpay from FIS Payment Application

Application User Guide for Merchant Usage

Wednesday, October 21, 2020 (v12)

Information contained within this guide is subject to change without notice. This application guide may contain new features that have not released to Production in order to prepare for General Release and customer availability soon.

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OmniFlex

There's flexibility, then there's OmniFlex—your all-in-one solution for smarter payments!

Introduction

OmniFlex is here to help small businesses like yours open up new payment possibilities. This secure online point of sale solution gives you the flexibility to accept and manage all your payments anytime and anywhere.

Whether your customers are in-store, on the phone, or on the move, add OmniFlex to your current POS or use it as a standalone to boost your payment acceptance capabilities by offering new ways to pay.

For card not present transactions, choose from a range of options like text to pay, e-invoicing with QR code, card on file or recurring payments. And for in-person transactions, there's EMV Contact and Contactless, including support for Apple Pay and Google Pay.

Better acceptance isn't the only reason why 32,000+ businesses choose OmniFlex, it also makes managing your payments so much simpler.

Add ease to your ecommerce by streamlining your online order management. If you want to bring customer information right up to date, account updater, card on file, and recurring payments make this simple. Looking to improve the overall customer experience? Then easy-to-generate refunds and reversals are at your fingertips. And if it's rapid reconciliation you're after, richer reporting via [iQ Now](#) gives you a single view of all your payments.

OmniFlex isn't just fast and smart, it's also highly secure. As you'd expect from a solution backed by Worldpay from FIS, all your payments data is safely stored on our PCI compliant server, ensuring you always have a backup option to maintain continuity in the event of a system malfunction.

In uncertain times, OmniFlex gives you the confidence and agility required to meet customers' needs through access to expanded payment methods.

Worldpay from FIS representatives are extremely knowledgeable in the products and services recommended to our customers, each available to demonstrate the value proposition and how it will benefit your business.

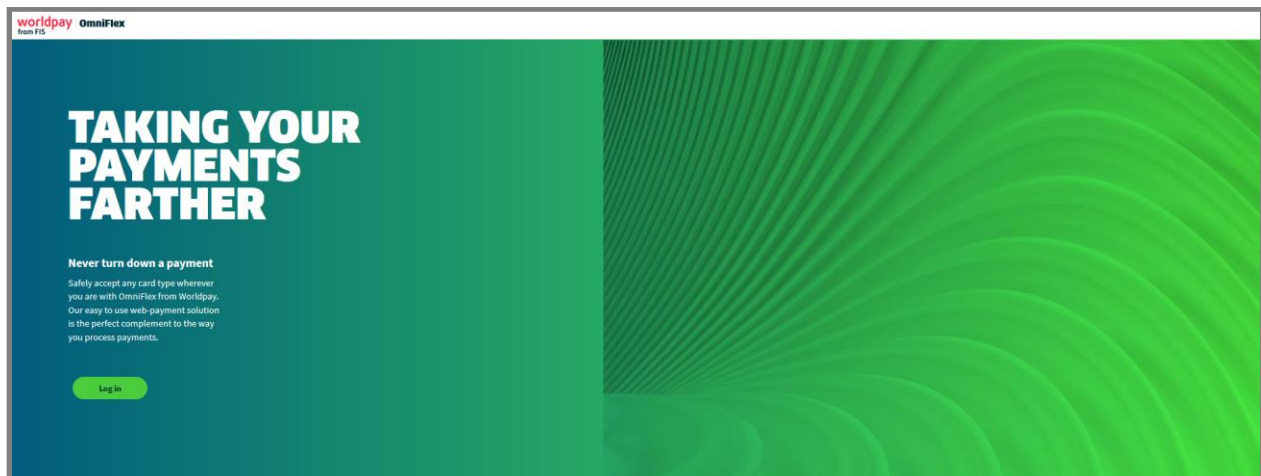
To learn more about OmniFlex, or to receive training – please contact your Worldpay from FIS representative today!

Operating

OmniFlex is a PC desktop browser application. The application is certified to support the most common web browsers, which includes **Internet Explorer**, **Firefox**, **Microsoft Edge** and **Chrome** when using a Windows operating system. For the best web browsing experience, **Chrome** is recommended. Safari browser is not supported currently.

OmniFlex is a browser-based application and is considered operating system agnostic, however select peripheral hardware devices may not work well with MAC iOS. Please consult the OEM hardware manual for operating system compatibility.

Customer Notice: Microsoft has announced it is ending support of **Internet Explorer** web browser in 2021. The firm said it will no longer support the browser starting August 17, 2021. It will begin sending user updates to download its Chromium-based Edge product.



Support Hub

Product information, user guides including an online ticketing support system is available on Support Hub [here](#).

<http://info.worldpay.com/omniflex.html>

Customer Service

Customer Support is available by contacting the telephone number indicated on your Worldpay bankcard processing statement. For all other inquiries, please contact your Worldpay from FIS representative.

To schedule an outbound service call, please visit the Support Hub customer resource center to schedule an appointment [here](#). The Support Hub is also available after login to OmniFlex from the menu.

1. Navigate your web browser to www.virtualterminal.com
2. From the login page, select the **Support** link
 - The page will redirect to the [Support Hub](#) customer resource center.
 - The URL is: <http://info.worldpay.com/omniflex.html>
3. Enter Merchant information, indicate a convenient date and time—a friendly advisor will contact you.
4. Resource – download the application user guide and review the online roadmap or watch videos, coming soon!

Login

Please navigate your web browser to www.virtualterminal.com

From the OmniFlex landing page, users can login to the application by choosing the **LOGIN** button.

A user has (2) minutes to authenticate their credentials. If the credentials page is idle for more than (2) minutes, the page will redirect back to the original landing page.

By selecting the **LOGIN** button from the landing page, the application will automatically download the latest version of the application seamlessly in the background to enter the application. This eliminates the need to manually clear your web-browser history (i.e., cache) when a new enhanced version of the application is released to production.

It's common to experience a slight delay (depending on your Internet connection speed) while the landing page loads the latest application version for use.

The screenshot shows the OmniFlex login interface. At the top left, the 'worldpay from FIS OmniFlex' logo is visible. The main content area is a white login form titled 'Log in'. It includes an 'Email' field with the placeholder 'Enter your email address', a 'Password' field with the placeholder 'Enter your password' and a toggle icon, and a 'Log In' button. Below the button are links for 'Forgot your password?', 'Support', and 'Privacy Policy'. The footer contains the copyright notice: '© 2020 FIS. Advancing the way the world pays, banks and invests™'.

Before you can login, a Merchant will need OmniFlex account credentials which include a **Username** (usually, the business owner email address) and unique **Password** established at time of invitation. All sub-level users (i.e., cashiers, managers, etc.) will obtain login credentials from the primary account owner of the business. The account owner will receive login credentials within (48) hours of account approval.

The image shows two side-by-side screenshots of the OmniFlex user interface. The left screenshot is the 'Log in' page, featuring a title 'Log in' at the top. Below it are two input fields: 'Email' with the value 'support@virtualterminal.com' and 'Password' with masked characters. A 'Log in' button is centered below the fields. At the bottom, there are links for 'Forgotten your password?', 'Support', and 'Privacy Policy', along with a copyright notice: '© 2020 FIS. Advancing the way the world pays, banks and invests™'. The right screenshot is the 'Set New Password' page. It has a title 'Set New Password' and three input fields: 'Email Address' with 'regina.kincaid@fisglobal.com', 'Password', and 'Confirm Password', all with masked characters. A green 'Update' button is positioned below the fields. At the bottom, a section titled 'Passwords must meet the following requirements:' lists six criteria, each with a checked checkbox: 'Must be at least 9 characters long', 'Contains at least 1 English uppercase character (A through Z)', 'Contains at least 1 English lowercase character (a through z)', 'Contains at least 1 numeral (0 through 9)', 'Has not been used in previous 5 passwords', and 'Does not contain your username, first name, or last name'.

Password Guidelines

- Password is at least 8 characters
- Has not been used in previous 4 passwords
- Does not contain your username, first or last name
- Contains at least 1 uppercase character (A through Z)
- Contains at least 1 lowercase character (a through z)

Reset Your Password

Forget your password? It's simple to reset it with no dependency on Worldpay to perform a reset for you.

1. Select the **FORGOT PASSWORD** link from the www.virtualterminal.com login page.
 - If you have a test account, please reset your password at www.cert.virtualterminal.com
2. Enter the email address of the Username that requires the password reset.
3. When complete, select the **SEND EMAIL** button.
 - A confirmation will be sent to the email address as validation of this change.



If password attempt is unsuccessful more than (3) attempts the account will be frozen for (30) minutes. You can immediately thaw your account by following the forgot password link on login page to repeat the cycle.

The user will receive an email invitation from noreply@virtualterminal.com to establish a new account password. The email invitation will require the user to select the secure link contained within the body of the email that will open a default web-browser page to enter a new password.

The image displays two parts of the password reset process. On the left is a web form titled "Reset Password" with an "Email Address" field containing "test@testuser.com" and a green "Send Email" button. On the right is a preview of an email received from "noreply@virtualterminal.com" to "Kincaid, Regina". The email header says "EXTERNAL: Welcome to OmniFlex". The body of the email features the Worldpay from FIS and OmniFlex logos, a welcome message, a "Set my password" button, and a green banner at the bottom that reads "TAKING YOUR PAYMENTS FARTHER".

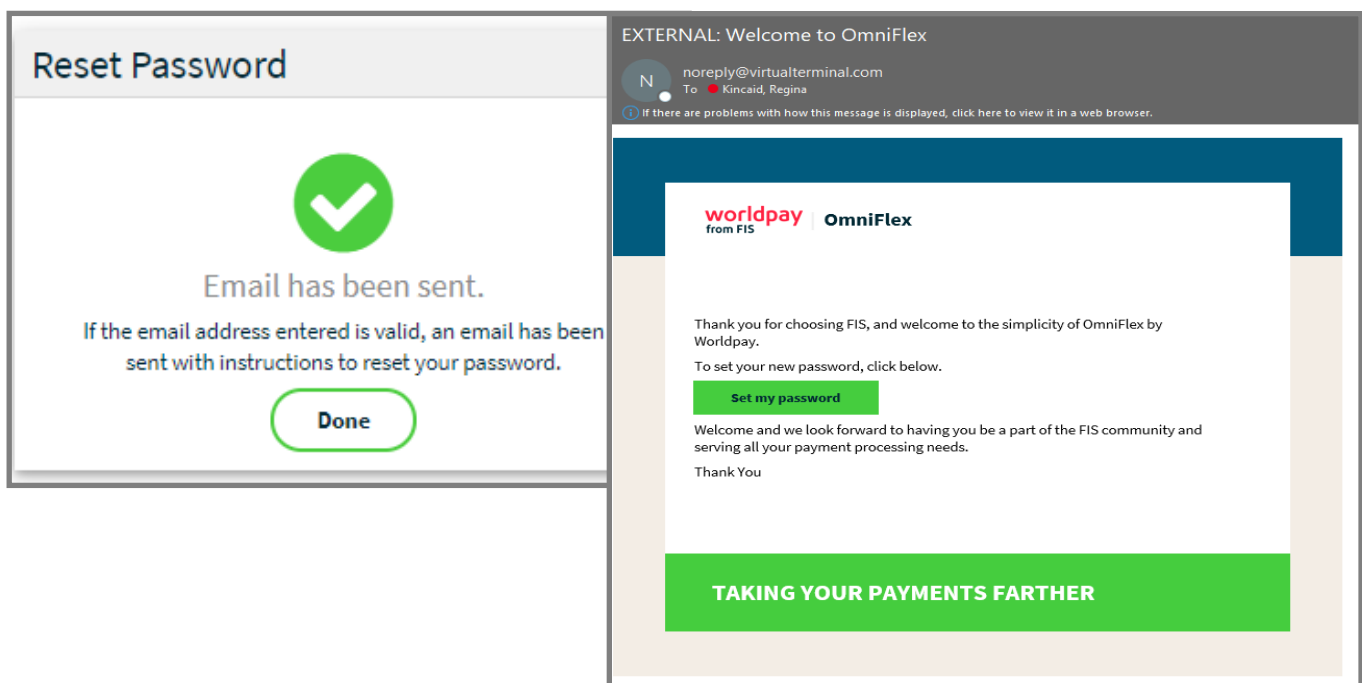
Once the user has selected a new password that meets the [Password Guidelines](#) the **UPDATE** button can be selected to enable the password change. A confirmation will be sent to your email address as a validation of this change. Account Owners and Administrators can manage all [users](#) from the settings page [here](#).

iQ Portal

OmniFlex credentials are not compatible with iQ Portal currently. These are two different applications that require separate login credentials to each. To learn more about iQ Portal, please visit the online demonstration [here](#) and contact your Worldpay from FIS representative.

Force Password Reset

The application can detect when your password needs to be reset. The application will prompt to change your password every (30) days. The application will display **'Your Password Has Expired'** and send an invitation to reset your password. Please select the **"Forgot Password"** link from the www.virtualterminal.com login page.



The emailed invitation requires the user to select the secure link within the body of the email message to establish a new password. Once the user has selected a new password that meets the [Password Guidelines](#) the **UPDATE** button is selected to apply the password change.

A confirmation will be sent to your email address as a validation of this change. When complete, you may login using your newly established password.

Navigation

Home

The application contains a **HOME** page that is designed to welcome customers to the application and provides a dashboard of important product notifications and announcements. All new features will be announced as they become available for general usage and a brief description provided for each. More complex features may include a usage video or webinar training session to review with customers, as needed.

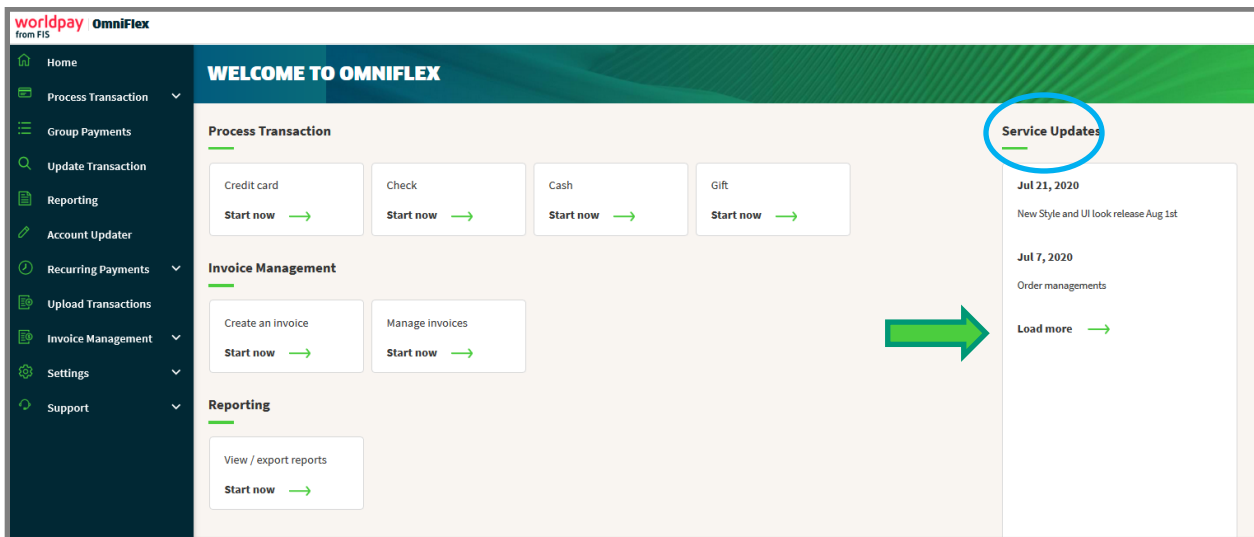
The left side toolbar is used to navigate the directory of pages, Account Owners can enable / disable optional feature from view.

Quick Cards

The **Home** page has quick cards which allow a user to get to a specific page in one easy-click. The quick cards displayed on the **Home** page will be based on the Merchant's configuration as well as the assigned permissions by the Account Owner.

Service Updates

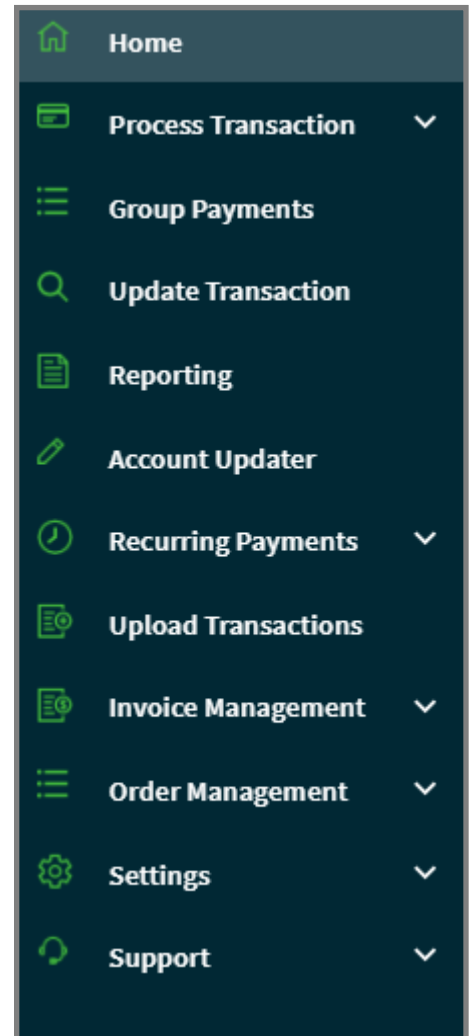
The right side of the **Home** page displays service updates and announcements. The latest two updates will be displayed; click **Load more** to view additional service updates and announcements.



An explanation of each navigation is offered on the next page.

Navigational Menu

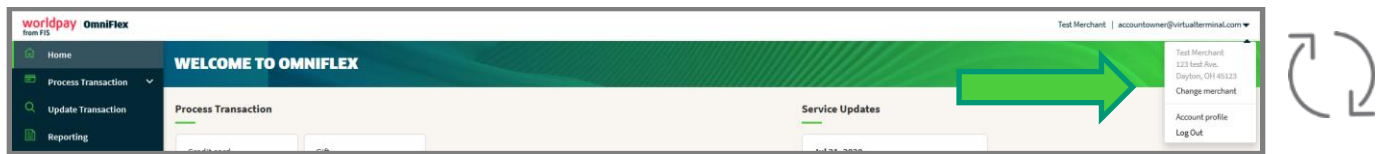
1. **Home** returns to the main dashboard and announcement page
2. **Process Transaction** to enter credit card payments for authorization (point of sale page)
 - a. Credit Card to process a bankcard transaction
 - b. Check to process an ACH transaction
 - c. Cash to process a Cash payment
 - d. Gift to process a Gift transaction
3. **Group Payments** to enter payments faster using a data entry page
4. **Update Transaction** to manage a previous transaction from history
5. **Reporting** to generate a report
6. **Account Updater** to update Visa and Mastercard card on-file details (i.e. expiry dates)
7. **Recurring Payments** to create and manage payment schedules
 - a. **Manage Payments** to edit and maintain card on-file information
 - b. **Failed Recurring Payments** to display failed payments in the last 30-days
8. **Upload Transactions** to upload a file for authorization (batch upload)
9. **Invoice Management** to create and send e-invoices for customers to remit payment
 - a. Create Invoice to create new sale or service invoices
 - b. Manage Invoices to manage all open or closed invoices
10. **Order Management** to create an online store and offer products for sale and easy online checkout
 - a. **Store Setup** to create an online store
 - b. **Product Variants** to create product attributes
 - c. **Product Catalog** to create products, goods and services for sale
 - d. **Order Tracking** to track, ship and deliver products and change status of fulfilment
 - e. **Tax Report** to report State, Local and unique tax
11. **Settings** allows the Account Owner to manage users and settings:
 - a. **Account Profile** to display store location information
 - b. **Terminal Setup** to enable optional features and configure the point of sale page
 - Custom Fields
 - Transaction Types
 - Optional Feature Enablement
 - c. **Users** to create and manage sub-level users
 - d. **Lane Management** to manage EMV chip-enabled PIN Pad devices
12. **Support** allows the user to contact Customer Care for support



Multiple Merchant

The OmniFlex application supports multiple store locations built under one corporate headquarter (MID hierarchy) with individual users having assigned permissions to access each store location by the **Account Owner** or **Administrator**.

The corporate headquarters **Account Owner** may choose to create multiple **Administrators** to manage additional users at each store location or decide to manage all users from the corporate headquarters office location. Learn how to create multi-location user access and permissions [here](#).



How to change Merchant?

Select the down arrow button located on the top-right of the application to change to a different store location at any time. To change store locations, select **CHANGE MERCHANT** and choose the desired location from the available list of store locations based on your user permissions, then select; **SET AS ACTIVE** to proceed to that location and take further action. The application will change to the desired store location when selected from the menu. The user may perform all actions assigned to their role at the location by the **Account Owner** or **Administrator**. (i.e., process payments, manage payments, run reports, etc.)



1. Select **Change Merchant**
2. Select and **Highlight** the desired **Store Location**
3. Select **SET AS ACTIVE**

Select current merchant

Filter 10 items per page

Merchant ID	Business Name	Address	City	State	Zip Code
123	Regina Test	8500 GH	Cincinnati	OH	45249
123	Taco Queen	8500 GH	Cincinnati	OH	45249

Set as Active

Now using Taco Queen
CLOSE

4. A message will appear at the bottom of the page confirming the selection made.

Acceptance

Card Types

Each card type is enabled on the Worldpay from FIS Merchant services bankcard profile (i.e., MID.) The application accepts all major credit and debit brands. This includes EMV chip-enabled card brands when the device is configured to support EMV smart reader or PIN Pad devices. See the list of supported devices [here](#). Card type acceptance also includes HSA (Health Savings Account) and FSA (Flexible Spending Account) card types when a Healthcare MCC code is set on the Worldpay Merchant services bankcard profile.

Industry Types

The industry type is established on the new Worldpay Merchant services profile (i.e., MID). The application does not support Lodging, Rental or Fuel (Petroleum). The application is designed to support one of the following industry types.

1. Retail
2. MOTO (mail-order / telephone-order)
3. Ecommerce
4. Restaurant

MCC Codes

The MCC (Merchant Category Code) code is established on the Worldpay from FIS Merchant services profile (i.e., MID). The MCC code is important to enable specific acceptance methods like HSA (Health Savings Account) and FSA (Flexible Spending Account) acceptance programs, Level-3 item detail for large ticket and commercial purchase card programs. Additional Merchant services profile settings may be required before the application can properly authorize and qualify these transaction types at time of authorization or settlement. Please contact Worldpay to verify your Merchant services profile information is configured with the correct MCC when using these advanced processing methods.

MID Setup



Worldpay recommends establishing a *new* MID (Merchant identification number) according to your industry type, MCC Code, pricing and billing requirements to include percentage of card present and card not present transactions.

Level 2 and Level 3

The application supports commercial and corporate card purchasing programs, large ticket, and enhanced line item detail. Please make sure your Worldpay Merchant services account profile is properly configured to support processing Level-2 and Level-3 payments.

- **Level-2** is supported for **Visa, MasterCard**, and **American Express**.
- **Level-3** is supported for **Visa, MasterCard** only.
 - **Level-3** is **not** supported for **American Express**

Worldpay from FIS does not guarantee reduced Interchange qualification. Worldpay does not offer Interchange refunds, discounts or credits when transactions do not properly qualify for any reason.

Process Transaction

Point of Sale

Process Transaction provides quick access to the point of sale page to enter a credit card, cash or check payment using a variety of methods to include the keyboard, USB-enabled secure device or tethered PIN Pad. EMV chip-enabled PIN Pad secure entry is supported with certified devices located [here](#). The point of sale page is also used to capture additional information for billing, shipping, and reporting purposes after the sale is complete.

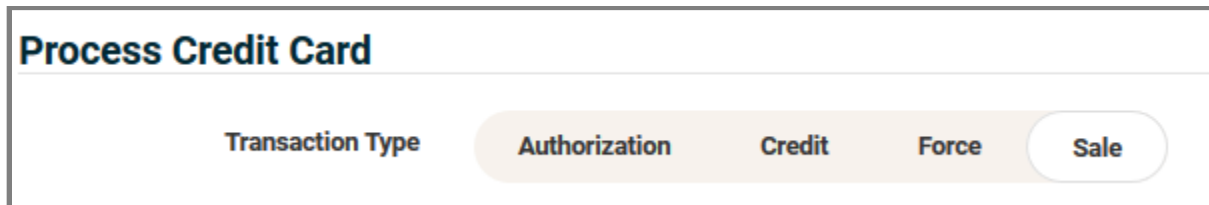
1. Select **Credit Card** to process a bankcard transaction (EMV, MSR or Manual Entry)
2. Select **Check** to process an ACH transaction (Manual Entry)
 - No check scanners or imagers is supported currently.

Additional operations include the capture of:

- Payment Information
- Customer Information
- Billing Information
- Shipping Information
- Level 2 payment information
- Level 3 payment information (when enabled)
- Custom Fields
- Receipt Details

Capture Sale

Begin on the **PROCESS TRANSACTION** page and select a desired **Transaction Type**. Each supported transaction type is displayed to select your choice.



The screenshot shows a web interface titled "Process Credit Card". Below the title is a horizontal menu with the label "Transaction Type" on the left. To the right of the label are four buttons: "Authorization", "Credit", "Force", and "Sale". The "Sale" button is highlighted with a light beige background, indicating it is the selected option.

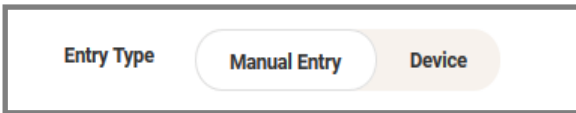
Transaction Type

The application will display each available **Transaction Type**:

- **Authorization** is used to perform a credit card authorization only
 - The authorization will hold the amount until the sale is captured releasing the hold for settlement.
 - Cardholder funds are not released until the authorization is captured, force or reversed.
- **Sale** is used to authorize, capture and settle a sale transaction
- **Force** is used to complete a voice authorization sale and requires the approval code to complete the transaction.
- **Credit Card Credit** (if enabled) used to issue a credit to a cardholder without an original authorization.
 - This transaction type is restricted and can only be enabled by the Account Owner with permission granted to select users [here](#).

Entry Type – Standard Keyboard

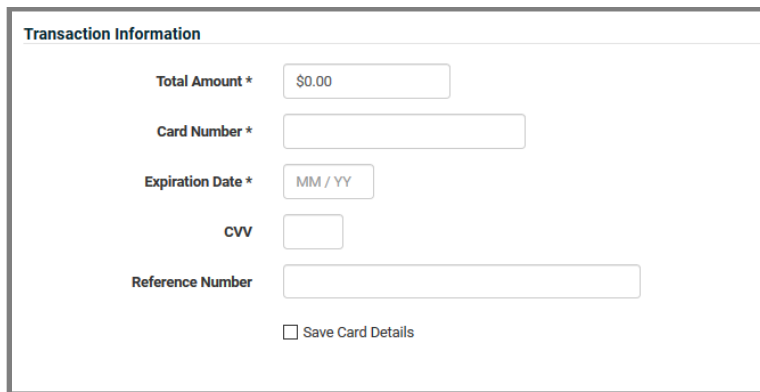
The application accepts both card present and card not-present transactions when using optional secure card readers to swipe or key-enter new transactions.



choose **Manual Entry** to **Key Enter** using your keyboard

choose **Device** entry to **Swipe, Insert** or **Secure Key**

Transaction Information



- 1 Enter the **Total Amount** of the Sale
- 2 Enter the card detail
- 3 Enter the **Expiration Date** (i.e., MM/YY)
- 4 Enter the **Security Code** (i.e., CVV/CID)
- 4 Enter an (optional) **Reference Number** (visible in iQ Portal)

During a device transaction the expiration date, security code and billing name fields will parse and populate at time of submission using the device.

Card-on File Storage

The application offers optional storage of cardholder and bank account information for repeat customers and recurring payments from the point of sale page. Customer cardholder storage is not available when using PIN Pads or the IDTech Augusta currently.

From the **PROCESS TRANSACTION** page:

1. Select “**Save Card Details**”
2. Enter the cardholder **First Name** and **Last Name**
3. The record is now stored within the **Recurring Payment** to schedule a payment or perform an immediate one-time payment.

PIN Pad Entry – IP Ethernet

The application accepts EMV chip-enabled credit and debit whether the card is present or not when using the supported PIN Pad device(s) to securely accept transactions at the point of sale. If your application is provisioned for EMV acceptance (i.e., Retail), the application will display additional customer information fields before completing the transaction on the PIN Pad device. The point of sale page is also used to capture additional information for billing, shipping, and reporting purposes after the sale is complete. EMV chip-enabled PIN Pad is supported with certified devices located [here](#).

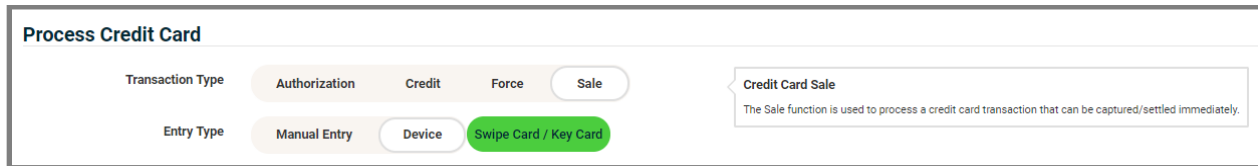
1. Chose the **Device** as the **Entry Type**
2. Enter the **Total Amount** of the sale
3. Select the desired **Lane** (i.e., PIN Pad located at your PC desktop checkout station.)
4. When complete, select the **SUBMIT**
5. The customer can now complete the Sale using the PIN Pad device.
6. When complete, the application will display the response and confirmation to print or email receipts.



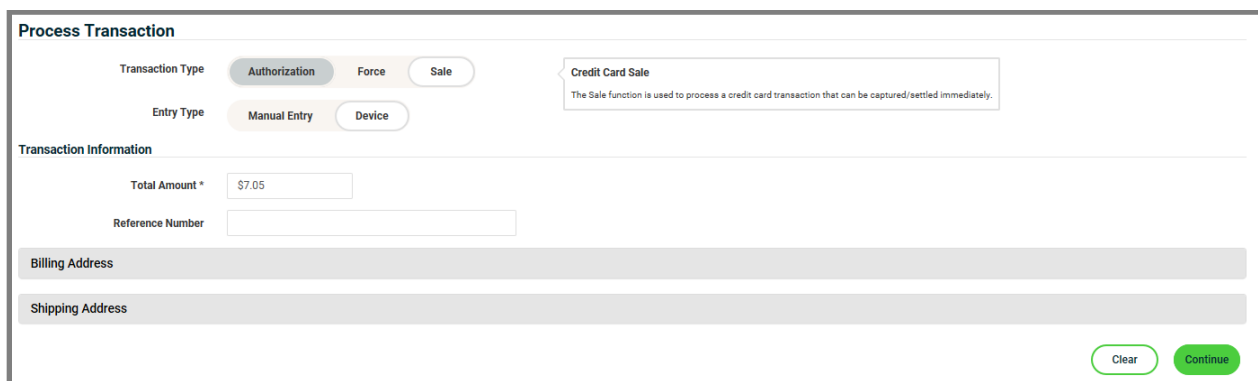
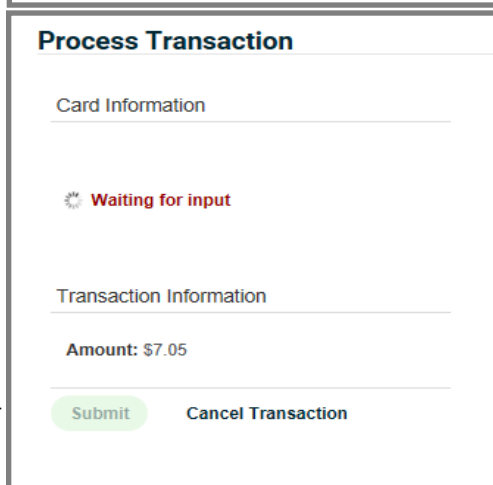
If you have more than one PC desktop checkout station with multiple devices provisioned on your account, you may select the desired PIN Pad device from the drop-down menu. The description of each PIN Pad is setup using Lane Management. If you would like to setup additional PIN Pad devices, please visit the [Device Activation](#) section of this user guide.

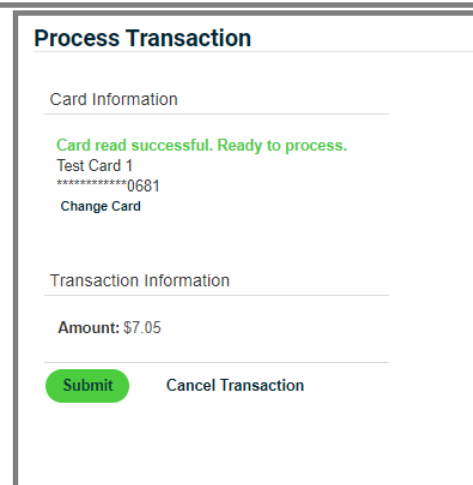
EMV Smart Reader – USB

The application also accepts EMV chip-enabled credit only payments when using the *new IDTech Augusta* (USB-enabled) device to securely accept both EMV and backup supporting MSR magstripe at the point of sale. If your application is provisioned for Retail acceptance using the IDTech Augusta device, the application will display basic billing, shipping and receipt details prior to transacting using the IDTech Augusta device. When using this acceptance model, custom fields and storing card on-file is not available currently.



1. Chose the **Device** as the **Entry Type**
2. Select the **Swipe Card / Key Card** to capture the card data
3. Enter the **Total Amount** of the sale
4. Enter **Billing Information**
5. Enter **Shipping Information**
6. Select **CONTINUE** to proceed and complete the transaction.
 - If the EMV insertion fails, the device will fall back to MSR after (3) attempts.
 - Select **RESET** to clear the page and start over.
7. When complete, the application will return a confirmation and receipt option.



Billing Information

The application enables the capture of the customer billing information registered with the cardholder bank for AVS (address verification services) to help reduce Interchange costs and fraud.



Card Swipe and Manual Entry transactions using a device will parse and populate the virtual terminal fields as it appears on the card.

Address Verification

Application users can perform AVS (address verification services) at the point of acceptance to validate and match the cardholder billing address to the cardholders' issuing bank statement for extra security, reduced Interchange cost and chargeback exposure. The application will respond with a match based on the numerical street address and zip code on-file at the Issuer. A card that does not match will not prevent the user from accepting the payment. An additional per transaction fee will apply for all AVS inquiries as outlined on your Worldpay Merchant processing agreement.

Billing Address

Customer Full Name	<input type="text" value="Test Transaction"/>	<input type="button" value="Verify Address"/>
Address	<input type="text" value="8500 Governor Hill"/>	
City	<input type="text" value="Cincinnati"/>	
State	<input type="text" value="Ohio"/>	
Zip Code	<input type="text" value="45249"/>	
Phone	<input type="text" value="513-900-3400"/>	

Shipping Information

The Shipping Address can be the same as the billing address or changed to an alternative shipping address during the payment acceptance. This is often used to capture where the goods should be shipped, or services performed. The shipping address will automatically populate from the billing address unless otherwise selected and modified at the point of entry.

Shipping Address

Same as billing address

Address

City

State

Zip

Phone

Custom Fields

The application supports custom fields unique to your business and created by the account owner. This is used to capture and collect non-payment related information for reporting and reconsolidation purposes. Custom Fields stores non-payment related information within the transaction details inside the Update Transaction and Reports section of the application. It is not passed with the authorization request accessible outside the OmniFlex application (e.g., iQ Portal). Custom Fields can be created when using the [Terminal Setup](#) section located under the [Settings](#) page. The Custom Filed labels hold 21 characters, and the entry fields hold 41 characters for user entry. It is not recommended to enter sensitive information in the custom field section (i.e., Patient Privacy, Social Security Numbers, etc.)

Custom Fields

It is not recommended you pass sensitive data such as social security number, date of birth or drivers license number in any custom field.

Shirt Size

Level 2 Acceptance

The application supports **Visa**, **MasterCard** and **American Express** for commercial purchasing card programs and Level-2 acceptance. Adding **Purchase Order** and **Customer Code** may qualify for reduced Interchange discounts with the Issuer, although is not guaranteed. Tax-exempt transaction can be stated as \$0.00. Tax Amount is not calculated in the total sale amount for authorization.

Level 3 Acceptance

The application supports **Visa** and **MasterCard** large ticket, commercial card purchasing programs, and enhanced line item detail at the time of purchase. **American Express** and **T&E** (Travel and Expense) card types is not supported currently.

To enable the application for Level-3 payments, the Account Owner can self-enable using the Settings > Terminal Setup page [here](#). Please contact Worldpay from FIS to make sure that your Merchant processing account profile (i.e., MID) is provisioned for Level 3 payment acceptance. Accounts not properly configured may experience non-refundable transaction downgrades to Level-2.

You are required to enter the cardholder billing information in order to complete the Level-2 section before proceeding to enter Level-3 data. The application does not perform validation of line item purchase details entered for Level-3 payments. The application only validates that Level-3 contains item details at the time of entry, authorization and capture. Worldpay will include Level-3 details at time of settlement to provide enhanced line item data to the cardholders' Issuing bank, and their participating corporate card accountholders.

Level 2 and Level 3

Note: Level 2 information is required in order to qualify for level 3. Only Visa and MasterCard transactions are applicable for level 3.

Level 2

Purchase Order

Customer Code

Tax

Level 3

Discount Amount

Shipping Amount

Duty Amount

[Add New Item](#)

Commodity Code	Description	Product Code	Quantity	Unit of Measure	Unit Cost	Discount	Total
0115	Test	1	1	Acre	\$0.00	\$0.00	\$0.00

Worldpay from FIS does not guarantee reduced Interchange qualification. Worldpay does not offer Interchange refunds, discounts or credits when transactions do not properly qualify for any reason.

Entry

To successfully process a Level-3 transaction, please make sure that each field is populated; leave no fields blank and \$0.00 is considered a valid entry.

Level 3	
Discount Amount	<input type="text" value="\$0.00"/>
Shipping Amount	<input type="text" value="\$0.00"/>
Duty Amount	<input type="text" value="\$0.00"/>

- 1 Enter **Discount Amount** of the total purchase
- 2 Enter **Shipping Amount** of the total purchase
- 3 Enter **Duty Amount** of the total purchase
- 4 Select to enter **Item Detail**

Caution: If you leave any field blank during the Level-3 item detail entry, the transaction will downgrade to a Level-2 qualification. **Worldpay from FIS does not guarantee reduced Interchange qualification. Worldpay does not offer Interchange refunds, discounts or credits when transactions do not properly qualify for any reason.**

Item Details

Level-3 enables you to capture enhanced line item detail for large ticket purchases and commercial card purchasing programs which may be eligible for reduced Interchange discounts at the Issuer, although not guaranteed.

Commodity Code	<input type="text"/>
Description	<input type="text"/>
Product Code	<input type="text"/>
Quantity	<input type="text"/>
Unit of Measure	<input type="text"/>
Unit Cost	<input type="text" value="\$0.00"/>
Discount	<input type="text" value="\$0.00"/>
Total	<input type="text" value="\$0.00"/>

1. Select industry **Commodity Code**:
 - Choose numerical value that best describes your business.
2. Enter **Description** of purchase (e.g. landscape)
3. Enter **Product Code** (e.g. SKU#, PN#)
4. Enter **Quantity**
5. Select **Unit of Measure** (e.g. Number)
6. Enter **Unit Cost** amount
7. Enter **Discount** amount
8. Enter **Total** amount & Select **SAVE**

Caution: If you leave any field blank during the Level-3 item detail entry, the transaction will downgrade to a Level-2 qualification. **Worldpay from FIS does not guarantee reduced Interchange qualification. Worldpay does not offer Interchange refunds, discounts or credits when transactions do not properly qualify for any reason.**

Commodity Code

Please select a **Commodity Code** that best matches your business type, goods and services sold. The application supports a drop-down menu of various numerical commodity code descriptions to choose. We recommend building your commodity code business practices around these 4-digit codes that best represent your business, goods and services.

To qualify for Level-3 the application requires that a commodity code is selected for each line item passed with the authorization request for settlement. Worldpay performs no validation on the 4-digit commodity code you choose, only that a commodity code is present and passed to the Issuer for qualification. Please visit the publicly available suggested resources that will help you build a good commodity code practices at your business.

[United Nations Standard Products & Services](#)

[Census.gov](#)

[Foreign Trade Commission](#)

Receipt Details

The application receipt details section enables application user to enter purchase details at the time of sale for electronic receipt sending and printing. Receipt details is not required and does not qualify for reduced Interchange rates or discounts. To enter receipt details:

ADD NEW ITEM

choose **ADD NEW ITEM** to modify the Receipt Details within the **PROCESS TRANSACTION** page.

Receipt Details Add New Item

Item #	Description	Price	Quantity
1	Red Shirt	\$5.00	1
2	Blue Shirt	\$6.99	2

- **Item#:** Enter the product SKU inventory number
- **Description:** Enter a Description of the item purchased
- **Price:** Enter the Unit Price of the item purchased
- **Quantity:** Enter the Quantity of the item purchased

SUBMIT

When complete, choose **SUBMIT** at the bottom of the **PROCESS TRANSACTION** page to complete the transaction. If you make a mistake, click the **RESET** button to clear all fields. If the submission is successful a confirmation receipt page will be displayed.

Duplicate Checking

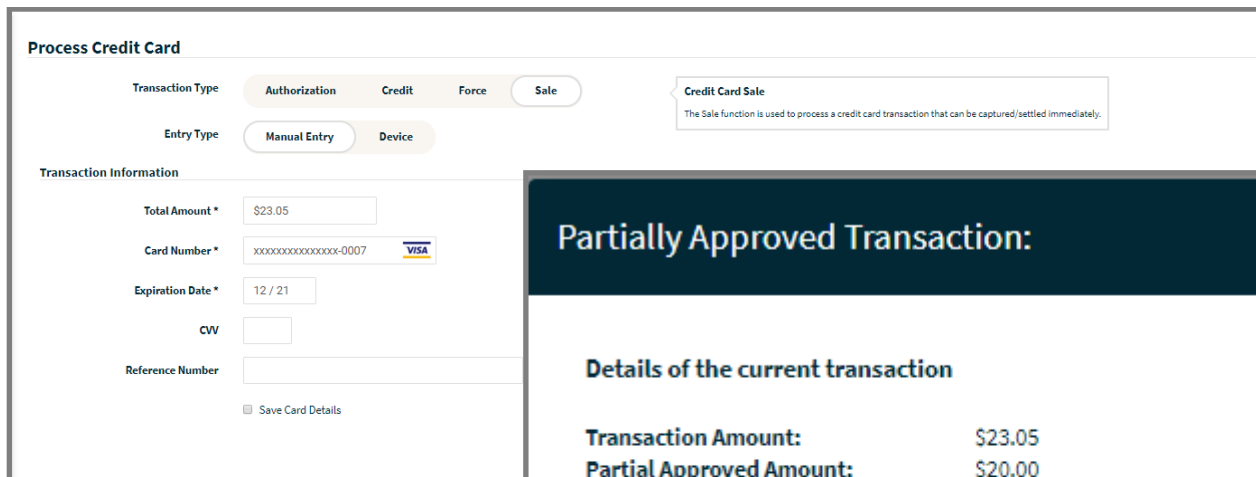
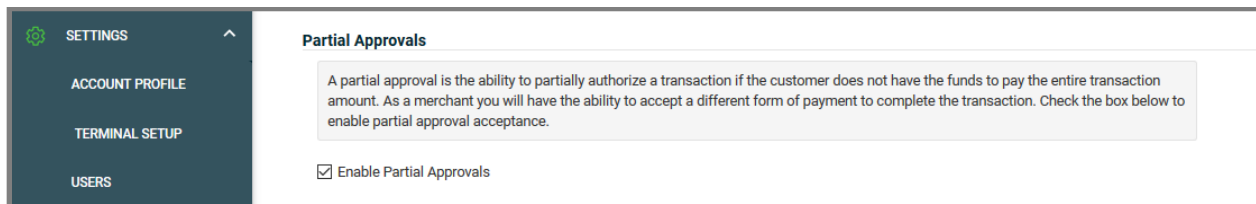
The application offers duplicate checking capabilities as an optional feature for each account and every transaction. **Duplicate Detection** is enabled by default for all accounts and can be disabled when calling the customer support center. It provides a means to identify a duplicate transaction by the following parameters within the application.

- Same Day + Same Card + Same Amount + Same Batch

Partial Approval

Partial Approval is the ability to partially authorize a transaction if the customer does not have the funds to pay the entire transaction amount. Merchants will have the ability to accept a different form of payment to complete the transaction.

To enable the partial approval, feature the Account Owner will need to enable the feature on the Terminal Setup page. Once enabled a partial approval response will be returned when a cardholder does not have enough funds to cover the entire transaction. To accept an additional form of payment the user will need to go to the Update Transaction page to complete the balance of the payment due.



Partially Approved Transaction:

Details of the current transaction

Transaction Amount:	\$23.05
Partial Approved Amount:	\$20.00
Amount Owed:	\$3.05

The transaction was partially approved for \$20.00. To accept an additional form of payment go to the Update Transaction page, and click on the associated transaction in order to complete payment.

Confirm

Transaction Receipts

The application will display the transaction receipt and support both receipt printing and electronic email receipts (maximum of 3 recipients), a copy for both Merchant and Customer.

- Select **PRINT MERCHANT RECEIPT** to print a Merchant copy
- Select **PRINT CUSTOMER RECEIPT** to print a customer copy
- Select **EMAIL RECEIPT** to **EMAIL** a customer copy (maximum of 3 recipients)
- Select **“OK”** to bypass Receipt Printing.
- Select **“Print Receipt”** to print to a printer.
- Information displayed on the receipts is subject to change based on transaction type and entry method selected at the time of sale.

Cash Transaction Receipt

Business Name	Taco Queen
Acceptor Id	123
Date	7/15/2020 2:26:01 PM CST
Customer Name	Regina Kincaid
Transaction Id	43
Transaction Status	Success
Transaction Type	Cash Sale
Transaction Amount	15.99
Tendered Amount	20.00
Change Due	4.01

Print Merchant Receipt
Print Customer Receipt
Email Receipt
Ok

Email 1 * Add Another Email

Maximum 3 email addresses

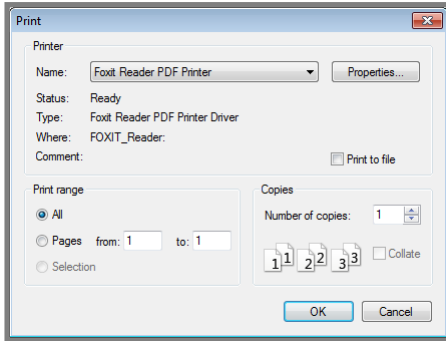
Cancel
Send

Transaction Receipts will be displayed in **Central Standard Time (CST)**



The application will provide confirmation the receipt was sent successfully.

How to print paper receipts?



Select **“Print Receipt”** to print

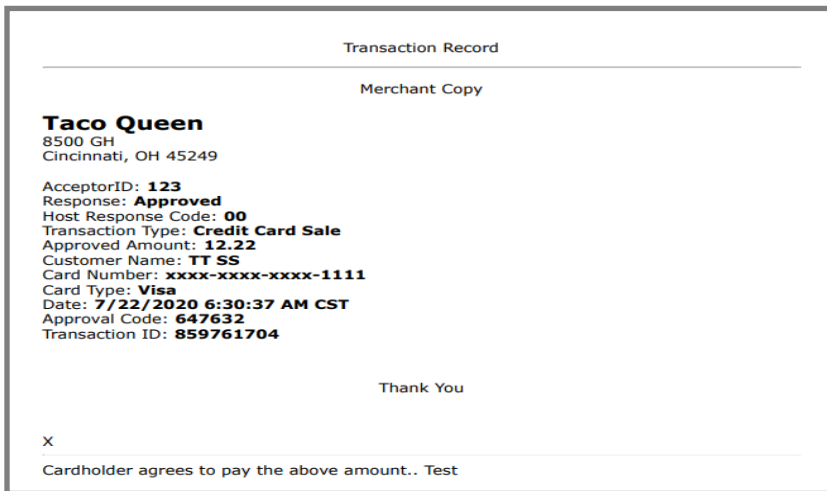
Select the name of the desired **Format**. (e.g. Adobe, Foxit Reader)

Select the **Number of Copies** desired.

Choose a File Name; select the Desktop as the file location and **SAVE**.

The Receipt will begin to print in the desired format to store a copy on your workstation. Receipts can be emailed using an external mail service of your choosing or emailed electronically using the application.

Merchant Copy



Transaction Receipts will be displayed in **Central Standard Time (CST)**

Customer Copy



Transaction Receipts will be displayed in **Central Standard Time (CST)**

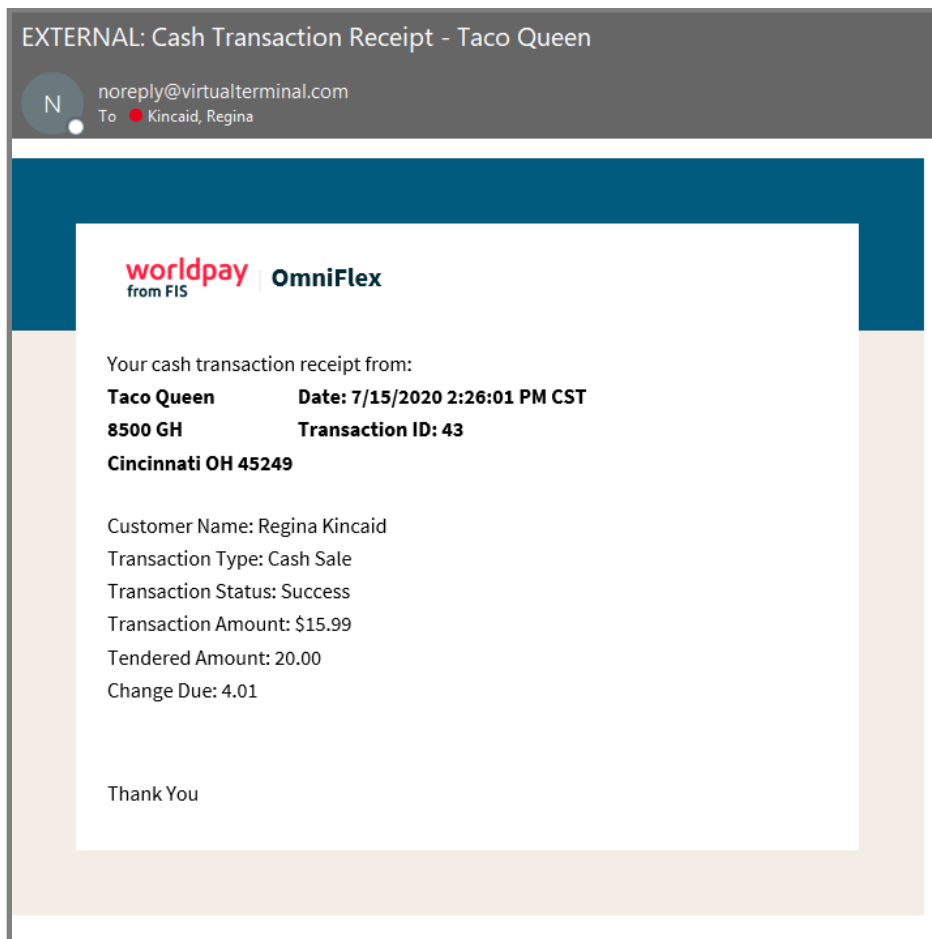
How to email a receipt?

Merchants can easily reprint a receipt from a previous transaction from the **UPDATE TRANSACTION** or **REPORTS** page.

Select **UPDATE TRANSACTION**:

1. Enter Search Criteria (e.g. Date Range, Transaction ID, etc.)
2. Select the desired transaction from the search
3. Select the **RECEIPT** button
4. The application displays the Receipt Transaction page to **PRINT** or **EMAIL** receipts.
 - Select **PRINT MERCHANT RECEIPT** to send a copy
 - Select **PRINT CUSTOMER RECEIPT** to send a copy
 - Select **EMAIL RECEIPT** to send a copy (maximum of 3 recipients)

Email Receipt Example



Check

Worldpay from FIS is partnered with [Check Commerce](#) as our trusted and secure provider to deliver fully integrated ACH check acceptance with Virtual Terminal Plus. Together our comprehensive solutions deliver unparalleled ACH solutions for our customers. This includes embedded transaction data and reporting analytics, fraud protection and real-time approvals and statuses resulting in a seamless payment experience that will help you grow your business through a unified virtual terminal product application.

Before a Merchant can use check services a Merchant will need to sign-up for services at Worldpay from FIS.

- If you are a Merchant, please coordinate your account setup directly through a Worldpay representative or reseller affiliate.
- If you are a Worldpay reseller affiliate, you must establish a direct relationship with Check Commerce at 1-888-263-0467, Monday to Friday 8:00 AM to 5:00 PM MST or email RM@CheckCommerce.com

If you are a Merchant and have your (6) digit Check MID ready, please contact the customer service telephone number listed on your monthly bankcard processing statement or call 1-800-808-6394. The Worldpay representative will add your (6) digit Check MID to your Encore / CRM account profile to enable check acceptance with you over the phone. We are available Monday through Friday, from 8 am - 8 pm ET to assist you.

Further acceptance instructions may be provided to you by Check Commerce for specific SEC Types, like CCD business-to-business ACH transaction which may require Financial Institution notification for both Merchant and client depository banks to debit and credit corporate accounts. Please contact Check Commerce at 1-888-263-0467 to assist with how to notify your bank and recommend the same for corporate clients.

To enable Process Check, the Account Owner will need to enable the feature on the Settings > Terminal Setup page [here](#).

NACHA Compliance

Unlike competitive applications, OmniFlex is fully NACHA compliant with each supported SEC type, ACH rules and regulations to include receipt requirements for PPD (pre-arrange deposit) for both single and recurring originations by prompting for a signature confirmation and acknowledgement for any recurring payment. This includes date, amount, frequency, and number of payments to protect against troublesome disputes, chargebacks, fraud and check returns.

Check Enablement

To enable Process Check, the Account Owner will need to enable the feature on the Settings > Terminal Setup page [here](#).

Check Sale

1. Process Transaction: **Select Check**

Merchants can now collect payments from their customers for either a one-time payment or setup recurring payment schedules. With online reporting, real-time status and authorization now available from the convenience of the OmniFlex application you can directly debit customers checking or savings (personal or business) account to receive and accept payments.

Process Check

Worldpay's ACH eCheck, powered by Check Commerce, enables merchants to electronically collect payments from your customers for either one-time or recurring payments by directly debiting your customers checking or saving accounts.

Enable Process Check

Enter Check

2. Select the Transaction Type: **Check Sale** or **Check Credit**

Process Check

Transaction Type Sale Credit

Total Amount *

Reference Number *

Check Sale

The Check Sale function performs an ACH Debit.

- The **Check Sale** function initiates an ACH Debit transaction
- The **Check Credit** performs and ACH Credit Deposit transaction
- **Reference Field** is an optional that will display a description on the customers' bank statement. This field can also be used for business accounts. This identifier is also available inside of iQ Portal.

Check Information

Account Type

Check Type

Name on Check *

Routing Number *

Account Number *

Check Number

Driver License Number

Driver License State

Routing No. Bank Account No. Check No.
⑆011000111⑆ 011000111⑆ 0110

Enter Bank Information

3. Enter **Checking** or **Savings**
 4. Enter **Personal** or **Business**
 5. Enter **Customer Name**
 6. Enter **Bank Routing** Number
 7. Enter **Account Number**
- Routing No. Bank Account No. Check No.
⑆011000111⑆ 011000111⑆ 0110
8. Enter **Check Number** (Optional)
 9. Enter **Driver License #** (Optional)
 10. Select Driver License **State** (Optional)

Account Type

Check Type

Name on Check *

Routing Number *

Account Number *

Check Number

Driver License Number

Driver License State

Enter Billing Information

11. Enter **Customer Address**
12. Enter Customer **City**
13. Select **State**
14. Enter **Zip** Code
15. Enter **Phone** Number

Address

City

State

Zip

Phone

Enter Receipt Information

16. Select **ADD NEW ITEM**

17. Enter the Receipt Details

- Item # (SKU)
- Product Description
- Unit Price
- Quantity

Receipt Details will display on the Customer and Merchant receipts to **SAVE**, **PRINT**, or **SEND**.

Receipt Details			
Add New Item			
Item #	Description	Price	Quantity

Submit Check

18. Select **SUBMIT** – to successful submit the payment for authorization

19. Select **RESET** – to clear the page and start over

Cash Payments

Merchants can use OmniFlex to process cash transactions. Since there is no authorization involved in accepting cash as a form of payment, the application will simply allow a Merchant to enter a cash transaction into the Process Transaction page, provide a receipt and track the cash transactions through reporting. Before a Merchant can process a cash transaction an Account Owner or Account Admin must enable the Cash feature from the Terminal Setup page.

The screenshot shows the 'SETTINGS' menu on the left with options: ACCOUNT PROFILE, TERMINAL SETUP, and USERS. The main content area is titled 'Process Cash' and contains a text box stating 'This setting allows your account to process cash transactions.' Below this is a checked checkbox labeled 'Enable Process Cash'.

From the left tool bar choose Process Transaction, and then choose **Cash**. For Cash transactions Merchants do have the ability to enter shipping information and receipt details. If a user makes a mistake and enters incorrect data into any of the fields and the cash transaction has already been submitted, the user can go to the **Update Transaction** page and void the cash transaction. Voiding a cash transaction will simply change the status of the transaction to Voided and the Merchant can then go back to the **Process Transaction** page to enter a new record for the cash transaction.

The 'Process Cash' form includes the following fields and elements:

- Customer First Name *: Regina
- Customer Last Name *: Kincaid
- Total Amount *: \$15.99
- Tendered Amount *: \$20.00
- Change Due: \$4.01
- Buttons: Clear (white), Submit (green)
- Shipping Address (greyed out)
- Receipt Details (greyed out)
- Footnote: * indicates a required field.

Process Cash

1. Customer **First Name**: enter the customer's first name
2. Customer **Last Name**: enter the customer's last name
3. **Total Amount**: enter the total amount of the transaction
4. **Tendered Amount**: enter the amount tendered, must be greater than or equal to the Total Amount
5. **Change Due**: this is the amount due to the customer; automatically calculated by the application.
6. Click the "**RESET**" button to clear all fields or click the "**SUBMIT**" button to submit the transaction.

Gift Payments

OmniFlex currently supports gift processing in Worldpay's Integrated Payments channel only, leveraging the stored value program through the Express platform. Before a Merchant can begin acceptance, the Merchant must be enrolled in the StoreCard program. Once the Merchant is enrolled, the account owner will need add the StoreCard ID & Password to the Terminal Setup page [here](#).

Process Gift

From the left tool bar, select **Process Transaction** then select **Gift**.

Transaction Type: choose a transaction type from the drop-down menu

1. Gift Card **Activate**: activates a gift card and loads funds to the card
2. Gift Card **Balance Inquiry**: checks the balance of a gift card
3. Gift Card **Credit**: returns money to a gift card
4. Gift Card **Reload**: loads additional funds to a gift card
5. Gift Card **Sale**: redeems a gift card, removing value from the card
6. Total **Amount**: enter the amount of the transaction, required field
7. **Card Number**: enter the full gift card number, required field
8. **Expiration Date**: MM/YY format, optional field (most gift cards do not have an exp date)
9. **CVV**: enter the CVV value if applicable, optional field

Billing Address

Billing Address

Customer Full Name

Address

City

State

Zip Code

Phone

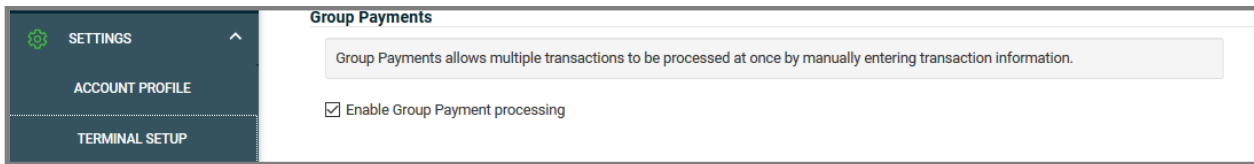
10. **Address**: enter the billing street address
11. **City**: enter the billing City
12. **State**: choose the billing State from the drop-down menu
13. **Zip**: enter the 5 or 9-digit billing zip
14. **Phone**: enter the cardholders 10-digit telephone number

Gift Partial Approvals

The application supports partial approval for Gift Card Sale transaction. This means if there are not enough funds available on the gift card, the application will display a partial approval response on the receipt. The user can navigate to the Update Transaction page to accept an additional form of payment to complete the transaction. Only Credit, Check or Cash or available options (if Check/Cash are enabled on the Merchant's account). Another gift card cannot be used as an additional form of payment.

Group Payments

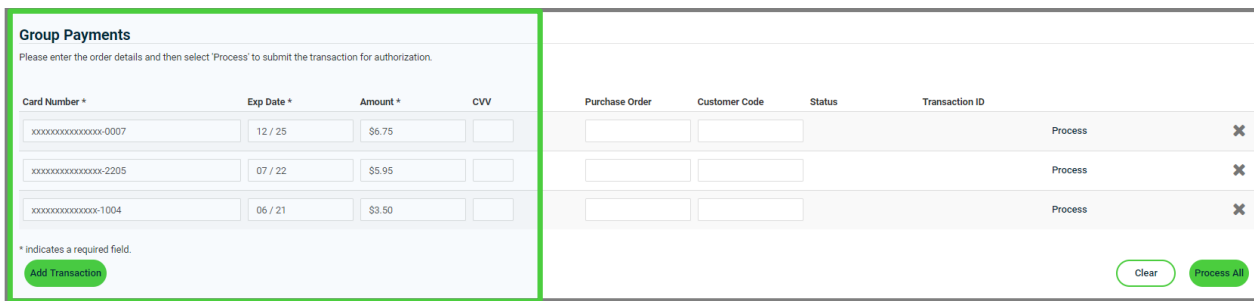
The application supports **Group Payments** for faster acceptance at the time of purchase or used in the back-office. Group Payments can also be used by data entry clerks at a financial institution to enter payment information on behalf of their corporate or small business lockbox clients. Group Payments enables transactions to be processed fast, individually or simultaneously each from one page. The application will perform a field validation as the cardholder payment details are entered to avoid possible mistakes at time of entry. If the PAN (personal account number) does not meet the MOD-10 field validation checks, each error will be outlined in red to immediate correct before resubmitting for approval. The Account Owner can enable the feature on the Settings > Terminal Setup page [here](#) by selecting the Group Payments option.



Entry

The **Group Payments** page invites Merchants to key multiple transactions on a single page for submission.

- Enter Card Number
- Enter Expiry Date
- Enter Amount
- Enter CVV



Level 2

The remaining fields on the page are optional.

- Enter Purchase Order, Customer Code, and Tax (Optional Fields)

Group Payments
Please enter the order details and then select "Process" to submit the transaction for authorization.

Card Number *	Exp Date *	Amount *	CVV	Purchase Order	Customer Code	Status	Transaction ID
xxxxxxxxxxxxxxxx-0007	12 / 25	\$6.75				Process	
xxxxxxxxxxxxxxxx-2205	07 / 22	\$5.95				Process	
xxxxxxxxxxxxxxxx-1004	06 / 21	\$3.50				Process	

* indicates a required field.

Buttons: Add Transaction, Clear, Process All

Once the required fields have been completed, select the Process button on the row where the transaction is located, or continue to add additional lines. Select the Process All button at the bottom of the page to submit all transactions at the same time. If a mistake is made, select the Reset button to clear all fields on the page. To remove a row, click the X next to the row to delete the record. Once a row has been processed no further action can be taken on the transaction.

Caution: If you leave the Group Payments page to return sometime later, all previous transactions will no longer be visible.

Status

Once a transaction has been processed the **Status** column will display a **Transaction ID**. To take further action on a transaction (i.e. Refund, Void, Reversal) using your keyboard select "copy & paste" and navigate the **UPDATE TRANSACTION** page to "paste" the **Transaction ID** in the search option. This step will allow you to take the desired action to manage the transaction.

Group Payments
Please enter the order details and then select "Process" to submit the transaction for authorization.

Card Number *	Exp Date *	Amount *	CVV	Purchase Order	Customer Code	Status	Transaction ID
xxxxxxxxxxxxxxxx-0007	12 / 25	\$6.75				Process	
xxxxxxxxxxxxxxxx-2205	07 / 22	\$5.95				Process	
xxxxxxxxxxxxxxxx-1004	06 / 21	\$3.50				Process	

* indicates a required field.

Buttons: Add Transaction, Clear, Process All

Update Transaction

The application provides a method to manage transaction from history. Each transaction can be managed up to **(45) Days** from the original transaction date. The Account Owner will need to assign a unique role to perform Returns, Refunds and Credits. Learn more [here](#).

Manage Payments

- Enter the **Transaction ID** (from the cardholder receipt) to view a specific transaction
- Select **Start Date** and **End Date** to review a range of transactions
- Select **Status** to review transactions in a specific status, or leave blank to review all
- Build your report from the **Available Columns** to the **Selected Columns** point of sale page
- Choose **Submit** to display the information
- Choose **Reset** button to clear all fields
- When complete, select a transaction to manage or change the status of a previous transaction.

Capture: enables the original authorization to be captured for settlement.

Return: enables a Refund to the cardholder after the transaction has settled.

Reverse: releases the funds held by the original authorization to the cardholder.

Void: enables the original transaction to be removed from settlement.

Rebill: enables a previous settled transaction to be re-authorized for the same amount or a different **lower** amount using the original cardholder information on-file.

Adjustment: transactions can be adjusted from their original amount **higher** or **lower**. (i.e., add gratuity)

--- Transaction can be managed up to (45) Days from the original transaction date. ---

Update Transactions

The Update Transaction page is subject to a short delay when viewing a processed transaction after update. If you do not see the transaction record immediately on the page after update, please refresh your page to view the report.

Transaction ID

Start Date

Status

End Date

[View Batch Details](#)

Available Columns

- Billing Address
- Billing City
- Billing State
- Billing Zip Code
- Billing Phone
- Shipping Address
- Shipping City
- Shipping State
- Shipping Zip Code
- Shipping Phone

← →

Selected Columns

- Transaction ID
- Customer Name
- Approval Code
- Approved Amount
- Transaction Amount
- Status
- Transaction Type
- Last 4
- Card Type
- Date (CST)

[Clear](#) [Search](#)

Transactions

Click SEARCH above to view your list of transactions here.

The selected transaction will highlight available actions based on the transaction status. If an action is available, the button will highlight the options: **Rebill**, **Capture**, **Return**, **Reverse**, and **Void**. A **Rebill** will allow you to charge a cardholder from History the same amount, or a different **lower** amount, but not a higher amount. For higher amounts the authorization only, option must be used and adjusted higher at time to **Capture**. Changing the status of a transaction can take up to **(10) minutes** to reflect the desired change. A **Confirmation** and **Receipt** page will be displayed to offer confirmation a change has occurred.

Transaction ID	Customer Name	Approval Code	Approved Amount	Transaction Amount	Status	Transaction Type	Last 4	Card Type	Date (CST)
859759064		801387	3.89	3.89	Approved	Credit Card Sale	0007	Visa	7/15/2020 2:40:57 PM
43	Regina Kincaid			15.99	Success	Cash Sale			7/15/2020 2:26:01 PM
859759054		663813	23.05	23.05	Approved	Credit Card Sale	0007	Visa	7/15/2020 2:22:43 PM
42	Regina Kincaid			15.99	Success	Cash Sale			7/15/2020 2:15:24 PM
859759052		68038A	23.23	23.23	Approved	Credit Card Sale	0076	Visa	7/15/2020 2:13:49 PM
859759051				10.00	Declined	Credit Card Sale	0681	Mastercard	7/15/2020 2:10:27 PM
859759004		146318	100.00	100.00	Approved	Credit Card Sale	1111	Visa	7/15/2020 12:22:46 PM
859758991				7.05	Declined	Credit Card Sale	0681	Mastercard	7/15/2020 11:39:39 AM
859758989				10.00	Declined	Credit Card Sale	0076	Visa	7/15/2020 11:34:35 AM
859758951		243900	12.34	12.34	Approved	Credit Card Sale	1111	Visa	7/15/2020 8:16:00 AM

Capture from Authorization

1. Click the **“Capture”** button.
2. Check the box next to **“Add Additional Amount”**
3. In the Additional Amount field enter the amount you want to add to the transaction.

Confirm transaction amount ✕

Add Additional Amount

Please confirm the transaction amount.

Transaction Amount *	\$23.00
Additional Amount	\$2.00
Total Amount	\$25.00

Show level 2 fields

Show level 3 fields

Cancel
Confirm

The **Total Amount** field now reflects the sum of the Transaction Amount plus the Additional Amount (i.e., tax, gratuity or shipping fees, etc.)

Click the **“Cancel”** button to discard any changes or click the **“Confirm”** button to submit the transaction for the Total Amount. On the cardholders statement the transaction will appear as one transaction for the total amount submitted.

View Batch Details

From the **Update Transactions** page click on the **View Batch Details** button. A pop-up window will be displayed showing the details of the current open batch.

Update Transactions

The Update Transaction page is subject to a short delay when viewing a processed transaction after update. If you do not see the transaction record immediately on the page after update, please refresh your page to view the report.

Transaction ID: Status: **View Batch Details**

Start Date: End Date:

- **Batch ID:** The Batch ID is auto generated by Express
- **Total Transactions:** this is the total count of all transactions included in the batch
- **Transaction Amount:** this is the sum of all transactions included in the batch

Batch Information [X]

Details of the current batch

Batch ID:	30
Total Transactions:	43
Transaction Amount:	\$5,609.83

Cancel **Close Batch**

Close Batch

To close the open batch, click the **Close Batch** button or click **Cancel** to return to the **Update Transaction** page.

When a user clicks the **Close Batch** button a confirmation window will be displayed.

Click **Yes** to continue or **No** to cancel the request.

Once the request is completed a confirmation will be displayed.

Batch Information [X]

Batch Close

Are you sure you want to close the open batch?

No Yes

Cancel **Close Batch**

Your batch has been successfully closed **CLOSE**

Reports

OmniFlex makes reporting easy. The application **Transaction Reports** is used to view previously processed transaction and can be used to display them on-screen or exported to a desired report format. Transaction Reports are available for up to (12) months from the original transaction date.

Transaction Reports

Start Date 7/15/20

End Date 7/15/20

Transactions 4 selected

- Check
- Cash
- Gift
- Credit

[Close](#)

Status

Available Columns

- Billing Address
- Billing City
- Billing State
- Billing Zip Code
- Billing Phone
- Shipping Address
- Shipping City
- Shipping State
- Shipping Zip Code
- Shipping Phone

Selected Columns

- Transaction ID
- Merchant Name
- Approval Code
- Approved Amount
- Transaction Amount
- Status
- Transaction Type
- Last 4
- Card Type
- Date (CST)

Format

[Export](#) [Clear](#) [Preview](#)

Use arrow keys to display fields in the desired order on-screen or in the generated report format.

Preview

Click PREVIEW above to view a preview of your report here.

Run Reports

- Select the **Start Date**
- Select the **End Date**
- Select the report **Format** (optional)
- Build your report from the **Available Columns** to the **Selected Columns**
- Select "**Preview**" to display the report
- Select "**Generate Report**" in **.CSV** or **.XML** file formats (.PDF – coming soon!)
- Select "**Reset**" to clear all fields and start a new report



If a large date range is selected, please be patient.

Recurring

Recurring Payments is a unique type of transaction where consumers authorize Merchants to bill a cardholder on a regular basis with cardholder agreement (i.e., monthly membership fees). The application makes each of these agreements available for Merchants to print and sign at time of setup. Each recurring payment is established at the time of sale for the same dollar amount. Multiple recurring payment transactions can be scheduled for different card types, frequencies including a one-time future payment. The automated scheduled task “executing a recurring payment” will occur at **6:30 AM CST** each day. This time is not customizable.

The application enables Merchants to store customer information and include multiple card brands / types in a secure and encrypted vault (aka: wallet) to protect cardholder information to simplify the payments process for your repeat customers. Each transaction is tokenized in the background, but the application does not display the identity of this token for use in the reports at this time. A prepaid (re-loadable) gift card of stored value is not a recommend for recurring payment setups.

Manage Payments

On the Manage Payments page a user can add, edit or delete cardholder information, payment methods (stored credit cards) or scheduled tasks (recurring payments).

Manage Payments			
Customer List			
Filter	10	items per page	View Detail Add Customer
First Name	Last Name	Email	Phone
Sheldon	Cooper	sheldon.cooper@test.com	513-111-1111
Jane	Smith	jane.smith@somewhere.com	111-222-3333

The Filter field can be useful when you have many cardholders saved and you are searching for a specific recurring payment. Enter any search criteria that you may have entered for the cardholder (first/last name, email address or phone number).

View Details

To view the information stored on a customer record select the customer record from the grid and click the “**View Detail**” button at the top of the page.

Manage Payments			
Customer List			
Filter	10	items per page	View Detail Add Customer
First Name	Last Name	Email	Phone
Sheldon	Cooper	sheldon.cooper@test.com	513-111-1111
Jane	Smith	jane.smith@somewhere.com	111-222-3333

The **Customer Payment Detail** page is now displayed. This page will display any payment method and recurring payment that exists for the customer record. Users can **Edit**, **Add** or **Delete** any of the stored information.

Manage Payments Return To List

Customer Payment Detail

Jane Smith Delete

Undo Save

Check Payment Methods Delete selected Edit selected Add

Type	Last 4	Routing	Address
Checking	3456	xxxxx0134	123 Main St.3, Denver3, CO 8010183

Credit Card Payment Methods Pay now Delete selected Edit selected Add

Type	Last 4	Expiration	Address
Visa	0007	08 / 20	-
Mastercard	2205	08 / 20	-

Recurring Payments Delete selected Edit selected Add

Payment Method	Frequency	Start Date	# of Payments	Payments Remaining	Amount	Reference Number
Checking-3456	Weekly	04/15/2019	2	1	\$5.70	
Checking-3456	Weekly	04/26/2019	3	0	\$0.33	
Checking-3456	Weekly	04/16/2019	-	-	\$3.33	
Checking-3456	Weekly	04/17/2019	7	0	\$0.77	

Add Customer

Follow the steps below to add a customer record.

1. Click the **“Add Customer”** button at the top of the page.
2. Enter the cardholder’s information.
3. Click the **“Save”** button to save the customer record, click **“Save And Continue”** button to save the customer record and add a new payment method or click the **“Cancel”** button to return to the previous page.

Add Customer

Cancel Save Save and Continue

Add a Payment Method

- From the Customer Payment Detail page, click the “Add” button under the Credit Card Payment Methods section.

Credit Card Payment Methods			
Type	Last 4	Expiration	Address
No payment methods to display.			

- Enter the payment method (card details)
- Click the “Save” button to save your entry.
 - Click the “Cancel” button to discard the information entered

Add Payment Method

Card Number *

Expiration Date *

Street Address

City

State

Zip Code

* indicates a required field.

Immediate Pay Now Option

To process an immediate one-time payment (i.e., non-recurring payment) from a card saved on file:

1. Select the credit card payment method and click the “Pay Now” button.

Credit Card Payment Methods			
			<input type="button" value="Pay now"/> <input type="button" value="Delete selected"/> <input type="button" value="Edit selected"/> <input type="button" value="Add"/>
Type	Last 4	Expiration	Address
Mastercard	2205	08 / 20	123 Big Bang Rd, Somewhere, CA 90210

2. Enter the amount of the transaction and a reference number (if applicable).
3. Click the “Cancel” button to return to the previous page or click the “Submit” button to process the transaction.
4. If the transaction is successfully processed a transaction receipt will be displayed

Process Credit Card Sale

Total Amount *

Card Number *

Expiration Date *

Reference Number

* indicates a required field.

Add a Recurring Payment

Click the “Add” button under Recurring Payments section to create a new schedule.

Recurring Payments						
Payment Method	Frequency	Start Date	# of Payments	Payments Remaining	Amount	Reference Number
No recurring payments to display.						

Frequency: choose an option from the drop-down menu

- **OneTimeFuture:** must enter a date in the future, cannot be current date
- **Daily:** any day
- **Weekly:** Starting Date + 7 Days
- **BiWeekly:** Starting Date + 14 Days
- **Monthly:** Every Month
- **Bi-Monthly:** Every Other Month
- **Quarterly:** Every Third Month
- **Semi-Annually:** Twice a Year
- **Yearly:** One a Year
- **MonthlyLastDay:** Recurring payment will execute on the last calendar day

Complete all fields in the pop-up window, view the Merchant/Customer Authorization Forms, check the box stating you have read the authorization forms, and click the “Save” button to save the data or click the “Cancel” button to discard the information entered.



The maximum length of the Reference Number field is 37 characters to display in iQ Portal.

Add Recurring Payment

Frequency *

Start Date *

Amount *

Payment Method *

Number of Payments *

Reference Number

Run Until Deleted

I have read the authorization form *

* indicates a required field.

When a recurring payment processes the “payments remaining” column will decrease. Once the payment has been processed it will be visible on both the Update Transaction & Reporting pages.

Manage Payments Return To List

Customer Payment Detail

Sheldon Cooper Delete

First Name *

Last Name *

Email

Phone

Undo
Save

Check Payment Methods Delete selected Edit selected Add

Type	Last 4	Routing	Address

Credit Card Payment Methods Pay now Delete selected Edit selected Add

Type	Last 4	Expiration	Address
Mastercard	2205	08 / 20	123 Big Bang Rd, Somewhere, CA 90210

Recurring Payments Delete selected Edit selected Add

Payment Method	Frequency	Start Date	# of Payments	Payments Remaining	Amount	Reference Number
Mastercard-2205	Monthly	09/18/2020	2	2	\$7.00	CustomerID12



All recurring payments on Express process daily at 06:30 CT. If a Start Date is entered that does not exist in each month Express will use the last available date and all future payments for that schedule will continue to fire on the new. For example, if a Start Date is set for the 31st, then on the first month where the 31st doesn't exist Express will use the 30th and continue to use the 30th on all future payments for that schedule. This rule does not apply to the frequency of “monthlylastday”.

Failed Recurring Payments

The application provides notification if a recurring payment has failed. The **Failed Recurring Report** will display each transaction that has failed the past (30) days. The Failed Recurring Report enables the ability to act if a payment has failed (i.e., declined, rejected) for any reason. A Recurring payment can fail for a variety of reason (i.e. expired card, non-sufficient funds, etc.) Consumer can pay in cash, check or alternative payment type may be accepted to receive funding for the failed payment from the customer.

Failed Recurring Payments											
Filter		10 items per page		Format		Export					
First Name	Last Name	Email	Phone	Exp Date	Payment Method	Frequency	Amount	Response Code	Response Message	Payment Date	Reference Number
Jane	Smith	jane.smith@somewhere.com	111-222-3333		Check	Weekly	0.88	101	Invalid Data	07/15/2020 07:00:00	
Jane	Smith	jane.smith@somewhere.com	111-222-3333		Check	Weekly	0.88	101	Invalid Data	07/15/2020 07:00:00	
Jane	Smith	jane.smith@somewhere.com	111-222-3333		Check	Weekly	3.33	101	Invalid Data	07/14/2020 07:00:00	
Jane	Smith	jane.smith@somewhere.com	111-222-3333		Check	Weekly	0.88	101	Invalid Data	07/08/2020 07:00:00	
Jane	Smith	jane.smith@somewhere.com	111-222-3333		Check	BiWeekly	0.99	101	Invalid Data	07/08/2020 07:00:00	
Jane	Smith	jane.smith@somewhere.com	111-222-3333		Check	Weekly	0.88	101	Invalid Data	07/08/2020 07:00:00	
Jane	Smith	jane.smith@somewhere.com	111-222-3333		Check	Weekly	3.33	101	Invalid Data	07/07/2020 07:00:00	
Jane	Smith	jane.smith@somewhere.com	111-222-3333		Check	Weekly	0.88	101	Invalid Data	07/01/2020 07:00:00	
Jane	Smith	jane.smith@somewhere.com	111-222-3333		Check	Weekly	0.88	101	Invalid Data	07/01/2020 07:00:00	
Jane	Smith	jane.smith@somewhere.com	111-222-3333		Check	Weekly	3.33	101	Invalid Data	06/30/2020 07:00:00	

« 1 2 »

Displays last 30 days of failed recurring payments.
To take action on a failed payment, please schedule a one-time future payment.

Export Failed Payments

The application provides a method to export failed recurring payments for reporting purposes only. The cardholder bankcard number is not provided in the file export option.

Select the desired format (.CSV, .PDF, .XML) and select EXPORT to extract the file. The application does not offer an IMPORT option once cardholder information has been corrected. Managing corrections is done inside the application using the Recurring payments page [here](#).

Funding Failed Payments

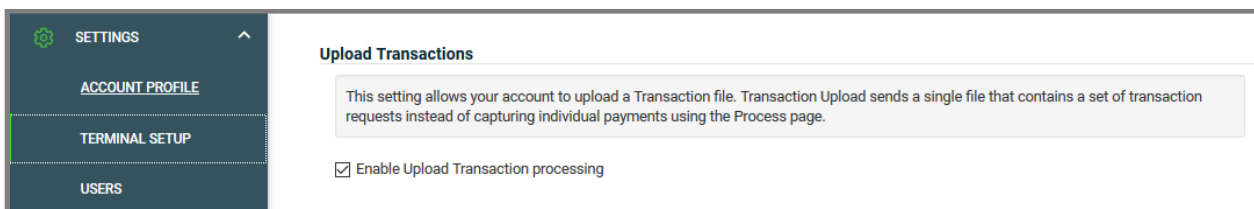
To receive funding for a failed payment a Merchant must establish a onetime future payment, send an electronic invoice or perform an immediate pay now option to receive payment. To execute a new recurring payment, this will require setup of the new card type offered by the cardholder. Merchants may also edit the original expiry date by re-entering the original card number on-file to continue the cycle.

Batch Upload

Upload Transactions allows a user to upload a single Microsoft .CSV (Excel) file which contains multiple transactions instead of capturing individual payments using the Process Transaction point of sale or Group Payments page. Transactions received to the system are immediately encrypted and tokenized.

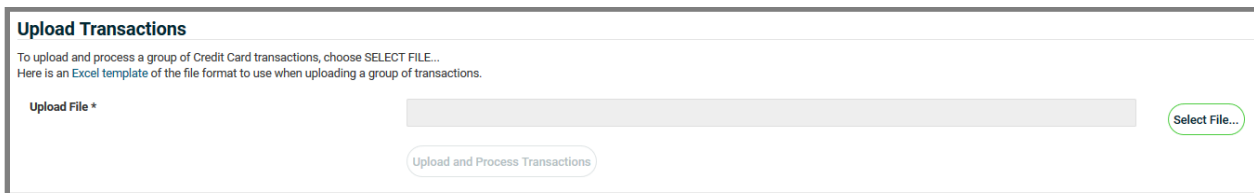
Upload Transactions

Batch Uploading is an optional feature that can be enabled by the Account Owner in the Settings > Terminal Setup page [here](#). Once enabled the Upload Transaction page will display on the navigation toolbar.



Upload Template

The Upload Transactions page will display and provide for download an Excel file template [here](#).



We highly recommend using the Upload Transaction template provided for download from the application to ensure the column headers is correct at time of import. If any column header is not correct the application will return an error and not process the file. Once the file is prepared, go to the Upload Transaction page to begin the batch upload process. Sensitive cardholder account details should be treated in accordance to PCI security practices and data standards.

	A	B	C	D	E	F	G	H
1	TransactionType	CardNumber	ExpirationMonth	ExpirationYear	CVV	TransactionAmount	TipAmount	TransactionID
2	CreditCardSale	4445222299990007	12	20		10.00		
3	CreditCardVoid							859809072
4	CreditCardAuthorizationCompletion					5.00		859809073
5	CreditCardRebill					15.00		859809065
6								

Required Fields

CardNumber	enter the full bankcard Number
ExpirationMonth	enter the two-digit expiration Month
ExpirationYear	enter the two-digit expiration Year
TransactionAmount	enter the amount of the transaction including cents (12.00)

Optional Fields

Interchange qualification benefits may apply when adding additional details to a transaction.

CardholderName	enter the name as it appears on the bankcard
CVV	enter the 3-digit CVV (back) or 4 digit CID (front) values
PurchaseOrder	if processing Level 2 transactions, enter the Purchase Order provided by the cardholder
CustomerCode	if processing Level 2 transactions, enter the Customer Code assigned by the Merchant
SalesTax	if processing Level 2 transactions, enter the total Tax amount including cents (3.00)
BillingAddress1	enter the Billing Address on-file with the bankcard Issuer
BillingCity	enter the Billing City on-file with the bankcard Issuer
BillingState	enter the Billing State on-file with the bankcard Issuer
BillingZipcode	enter the Billing Zip Code on-file with the bankcard Issuer
BillingPhoneNumber	enter the Billing Phone Number of the cardholder

Start Batch Upload

To upload files, click the **SELECT FILE** link at the top of the page.

1. Select the file you saved on your PC desktop and **Select Open**.
2. In the **Total Upload Amount** field, enter the sum of all transactions in the file.
3. Select **UPLOAD AND PROCESS TRANSACTIONS** to submit the transactions for processing.
Transactions received to the system are immediately tokenized and encrypted.

Upload Transactions

To upload and process a group of Credit Card transactions, choose SELECT FILE...
Here is an Excel template of the file format to use when uploading a group of transactions.

Upload File *

A confirmation will appear to finalize the file upload.

4. Select, **PROCESS** to begin the file upload.

Caution: Once a file is uploaded it cannot be stopped or cancelled.

Process All Transactions

You are about to process the following transactions:

- 1 CreditCardSale transaction(s).

Are you sure you want to process this file?

Note: Once a file is uploaded it cannot be stopped or canceled

The file will begin the upload process and perform several validations. This includes verification the column headers match, confirmation of bankcard personal account number (PAN) entry, and the total upload amount is accurate to the sum of each transaction included in the file.

Upload Status

The **Status** bar will display the progress of the file during the upload process.

File ID	Upload Date (CST)	Status	Total Count	Total Amount	Approved Count	Approved Amount	Unapproved Count	Unapproved Amount	Unprocessed Count	Unprocessed Amount	Uploaded Count
185	4/6/2018 6:41:28 AM	Uploading	2	\$50.00	0	\$0.00	0	\$0.00	2	\$50.00	0

An error message will display if any inaccuracies are found during the upload validation process allowing corrections for exceptions. Once the file is remediated a new change file can be re-uploaded. The application offers the ability to save error exceptions by choosing the **SAVE TO FILE** option. If the **TRY AGAIN** option is selected, the error message will disappear, and a new file uploaded. If no errors are found during the upload process the next step is for the uploaded file to be submitted for processing.

Once all transactions have been processed the grid will be updated, the file will have a status of Processing Complete and all columns will reflect the appropriate transaction counts and status. Next a user can view the details of an uploaded file.

History

Filter 10 Items per page ➔ View Detail

File ID	Upload Date (CST)	Status	Total Count	Approved Count	Unapproved Count	Unprocessed Count	Uploaded Count
38	7/16/2020 1:48:46 PM	Processing Complete	1	0	1	0	1

The **VIEW DETAIL** button will show a Response for each transaction that was included in the uploaded file. If you want to save the detailed records, click the **SAVE TO FILE** option. To manage transactions after upload, please visit the Update Transaction page located [here](#).

Transaction File Detail (ID: 38) ✕

➔ Save to File

File Row #	Transaction ID	Transaction Type	Response	Amount	Card Number	Exp. (MM/YY)	Purchase Order	Customer Code	Cardholder
2	0	CreditCardRebill	101/Cardnumber required	10.00					Regina rebill via upload

Invoice Management

The application supports the ability to create customized electronic invoices. Send e-invoices to your customers so they can remit payment using the OmniFlex hosted payment page. An electronic invoice can be sent to any customer with a valid email address or SMS text message. The invoice contains a hyperlink and QR Code that opens a secure online payment form where the customer can input their payment information. You will be notified once the payment is made and the authorization response posted for each transaction.

Important: Please validate with each recipient their email service is provisioned to accept new mail messages from noreply@virtualterminal.com before proceeding with generating invoices to your customers. Before sending new invoice to your customers, please validate the following [here](#) and seek permission for SMS text messages.

Create Invoice

The Merchant Name will appear on each recipient invoice, Merchants may customize their invoices.

- Enter the Sender and Receiver Information
 - **Invoice Number** is unique number that is generated by the application
 - **Merchant Email** is based on the user email address entering the order
 - 1. Select Type: **Sale** or **Service** (as the purpose of the invoice)
 - 2. Enter **Merchant Address** as the physical store or shipping location
 - 3. Enter **Merchant Phone** as the primary contact number with invoice
 - 4. Enter **Recipient Email** cardholder email address or **SMS Text Message** (i.e., mobile telephone number) – *standard carrier text message rates apply*
 - Select “include QR Code” to display on the emailed invoice.
 - 5. Enter **Amount** of invoice to be paid
 - 6. Enter **Email Subject** to customize the subject line of the invoice sent
 - 7. Select **CONTINUE**
 - 8. Select and choose EDIT INFORMATION SEND INVOICE

Create New Invoice

An electronic invoice can be sent to any customer with a valid email address or mobile phone. The invoice contains a hyperlink that opens a secure online form where the customer can input their payment information. You will be notified once the payment is made.

Sender and Receiver Info

Merchant name will appear on the invoice. You may also include your address and phone number.

Invoice Number	<input type="text" value="20200806101439468"/>
Merchant Email	<input type="text" value="support@virtualterminal.com"/>
Type	<input type="text" value="Sales"/> ▾
Merchant Name *	<input type="text" value="Taco Queen"/>
Merchant Address	<input type="text" value="123 Somewhere St"/>
Merchant Phone	<input type="text" value="222-333-4444"/>
Delivery Method	<input checked="" type="radio"/> Email Invoice <input type="radio"/> Text Invoice <input checked="" type="checkbox"/> Include QR Code
Recipient's Phone	<input type="text"/>
Recipient's Email *	<input type="text" value="regina.kincaid@fsglobal.com"/>
Amount *	<input type="text" value="\$25.00"/>
Email Subject *	<input type="text" value="Invoice 20200806101439468 from Taco Queen"/>

* indicates a required field.

Continue

View Invoice

From the navigation toolbar under the **Invoice Management** menu, select the Manage Invoices option to review all active, open and cancelled invoices. To narrow your search results, use the Filter option located at the top of the page.

Invoice - View

You are about to request money. Please make sure the following information is correct.

Sender and Receiver Info

Invoice Number	20200806101439468		
Merchant Email	support@virtualterminal.com		
Type	Sales		
Merchant Name *	Taco Queen		
Merchant Address	123 Somewhere St		
Merchant Phone	222-333-4444		
Delivery Method	<input checked="" type="radio"/> Email Invoice <input type="radio"/> Text Invoice	<input checked="" type="checkbox"/> Include QR Code	
Recipient's Phone			
Recipient's Email *	regina.kincaid@fisglobal.com		
Amount *	\$25.00		
Email Subject *	Invoice 20200806101439468 from Taco Queen		

Edit Information
Send Invoice

Edit Invoice

Invoice information can be modified at the time of entry, select **EDIT INFORMATION** to modify the invoice before sending to a customer. If the invoice has already been sent to the customer, the original invoice can be changed; select **VIEW** to modify the Sender and Receiver information including the Amount. The application will void the original invoice and send a new updated invoice to the customer.

Cancel Invoice

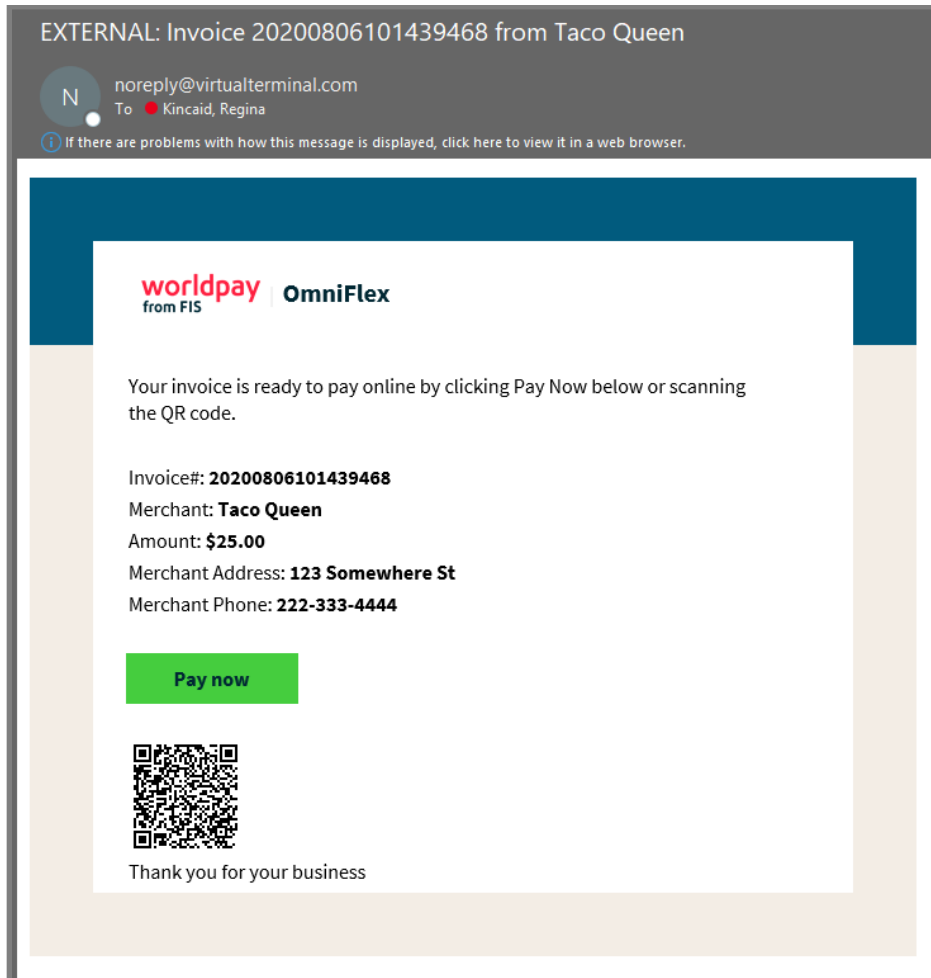
If the invoice has already been sent to the customer, the original invoice can be cancelled and removed from the system by selecting the **CANCEL INVOICE** option.

Send Reminder

To resend an invoice, or send a reminder invoice, use the [View Invoice](#) option to select the desired invoice and choose **CONTINUE**. You can apply any changes to the invoice, and or simply select **SEND** to generate the invoice as a “reminder” or to “resend” the invoice to your customer with an active secure link to remit payment. Note: You may choose to customize the subject line to indicate “Reminder Notification” or “Resent.”

Send Invoice

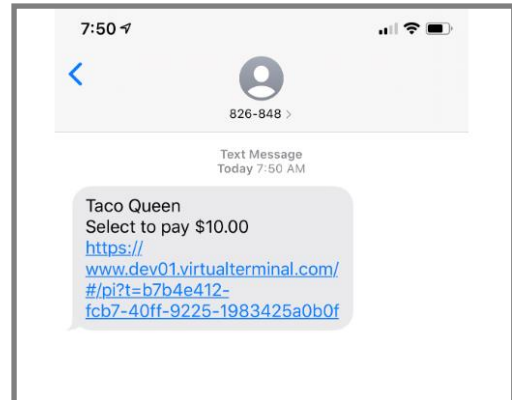
The application will send a customized invoice to the recipients' email address at the time the invoice was created. Recipients will receive the electronic invoice from noreply@virtualterminal.com. Additionally, users may select the SMS Text Message option to send the invoice to a mobile or tablet telephone number. The electronic invoice will include in the subject line the Merchant name and invoice number. The contents of the email or SMS text message will contain the invoice details, amount, address and telephone number with secure link to remit payment.



Pay Invoice Link

To pay the invoice, recipients can easily remit payment by selecting the secure link from body of the email or “copy and paste” the link into their supported web browser or select the secure one-click SMS text message pay now link.

The secure tokenized is link is active for **(30) Days**. Beyond (30) Days the Merchant will need to resend the invoice to refresh the tokenized link before the customer can remit payment.



Remit Payment

The recipient selects the secure link contained within the email to enter payment information. The web browser will direct the recipient to OmniFlex hosted payment page. The hosted payment page will contain the Merchant Name and include the Invoice Number on the website to remit payment.

worldpay from FIS
OmniFlex

Make a Payment to Taco Queen

Invoice Number: 20200809100228786

Total Amount \$25.00

Card Number *

Expiration Date *

CVV

First Name *

Last Name *

Customer Billing Information ➤

Address

City

State

Zip Code

Phone

Email Address

* Indicates a required field.

Clear
Pay

Enter Payment Information

Recipients enter the following payment information:

1. **Total Amount** – is preconfigured by the Merchant at the time the invoice was created and cannot be changed by the recipient.
2. Enter **Card Number**
3. Enter **Expiration Date**
4. Enter **CVV Code**

Payment/Authorization Information

Total Amount

Card Number *

Customer Billing Information

First Name

Last Name

Address

City

State

Zip

Phone

Email Address

Enter Billing Information

Recipients enter the following billing information:

5. Enter **First Name**
6. Enter **Last Name**
7. Enter **Address**
8. Enter **City**
9. Select **State**
10. Enter **Phone Number**
11. Enter **Email Address**
12. Select **SUBMIT** to remit payment or **RESET** to clear the page and start over.

The application will prompt a confirmation page and allow the recipient to **PRINT** or **SAVE** a receipt.

worldpay | OmniFlex
from FIS

Invoice Number: 20200806100128786 has been successfully paid.

Transaction Receipt

<p>Response</p> <p>Host Response Code</p> <p>Date</p> <p>Customer Name</p> <p>Transaction ID</p> <p>Transaction Type</p> <p>Approval Code</p> <p>Card Number</p> <p>Card Type</p> <p>Approved Amount</p> <p>Address Verification Response (AVS)</p>	<p>Approved</p> <p>00</p> <p>7/16/2020 2:01:24 PM CST</p> <p>Regina Kincaid</p> <p>859759354</p> <p>Credit Card Sale</p> <p>617555</p> <p>xxxx-xxxx-xxxx-0007</p> <p>Visa</p> <p>25.00</p> <p>Street address and 5-digit postal code match.</p>
---	---

[Print Customer Receipt](#) [Ok](#)

Troubleshooting

Worldpay and Merchants are not responsible for the recipient's internet connectivity, network, or email service provider configurations to receive new mail messages. Below is a helpful guide to validate with your customer before sending invoices. Please validate the recipient has performed each of the following actions to successfully validate if new invoices can be received from the OmniFlex application.

1. Has a stable connection to the Internet through an internet service provider (ISP);
2. Has a mail-server, SMS text carrier, or web-mail provider;
3. Has the ability to "Send and Receive" email and SMS text messages from third-parties or outside their network;
4. Has noreply@virtualterminal.com configured as a "safe sender" and white-listed within their web browser, mail server, and network;
5. Has supported web browser to remit payment;
6. Has the latest version of the above supported web browser installed;
7. Has checked junk, spam and deleted folders for new mail messages;
8. Has selected the "Send and Receive" option when using a distributed mail service (i.e. Outlook);
9. Has selected the F5 option (from their keyboard) to refresh the web page when using a web-based mail service. (i.e., Gmail, Hotmail, etc.)

If all the above options have failed, kindly encourage the recipient to seek assistance from their ISP or mobile cell phone carrier (internet service provider, network, or mail server solution) provider.

Settings

Terminal Setup

The **SETTINGS** tab contains **Account Profile**, **Terminal Setup**, and **Users** (User Management) sections.

Account Profile: to view the Merchant Information

Terminal Setup: to add Custom Fields and enable optional features

Users: to add, remove, modify Users


Custom Fields

Merchants can create a **Custom Fields** which will be displayed on the **PROCESS TRANSACTION** page to capture non-payment related information for storage and reporting within the application.

- Choose **Add Field** to create a new custom field
- Enter **Field Name** (up to 21 characters)
- Enable the field name **True** to display the field on the **Process Transaction** point of sale page.
- Select **Save** to save your entry.
- Select **Cancel** to cancel your entry.
- Choose a field and make the desired edit. Select **Save** to update how the field is displayed.

Custom Fields

It is not recommended to pass sensitive data such as social security number, date of birth or drivers license number in any custom field.


Add Field


Field Name	Type	Enabled	Receipt	Required	Display Order
There are no fields to display.					

Users

How to create a new User is easy. It requires the **Account Owner** or **Administrator** to add, create or modify a sub-level user.

User Management

Authorized Users

Filter 10 items per page 

Email Address	Role	First Name	Last Name
regina.kincaid@fsglobal.com	AccountOwner	Regina	Kincaid
regina.kincaid1@vantiv.net	AccountAdmin	Regina	Kincaid (deactivated)
rakin30@hotmail.com	Manager	Regina	Kincaid

1. Select **Add User**
2. Enter **First Name** and **Last Name**
3. Enter **Email Address**
4. Select **User Role**
 - o Cashier, Admin, etc.
5. **Save** to save the user
6. **Cancel** to clear all the fields

Regina Kincaid

Vendor ID Role *

First Name * Last Name *

Email Address *



New Users will receive a Welcome Letter from OmniFlex which will allow them to login and establish a new password.

Change Merchant Access

The Account Owner or Administrator can provide access to multi-store locations.

1. Select **EDIT MERCHANT ACCESS**
2. Select each Store Location accessible to assign it to your user, or **ADD ALL**
3. Select **REMOVE ALL** the Store Location from a user.

Lane Management

The application enables users to setup their PIN Pad device (i.e., Ingenico iPP320) and other supported EMV enabled devices. To complete this step, you will want to have your PIN Pad device plugged-in to an available IP-Ethernet port connection on the back of your cable modem, Wi-Fi router, or IP-port extender.

Device Activation

To get started, navigate to the [Settings](#) and select the Lane Management page.

To add a device:

1. Select the **ADD LANE** button
2. Enter **Lane ID** – a unique number assigned to the device by the user (i.e., 100.)
3. **Description** – a unique name assigned to the device by the user (e.g. PIN Pad)
4. **Terminal ID** – provided by your Merchant services provider
5. **Activation Code** – a unique secure key that is displayed on the device
6. Once the above information is entered, select **SAVE**.

The application will confirm that your device is now provisioned and tethered to the OmniFlex application. You will notice the PIN Pad display will change to the triPOS™ logo as confirmation your device is now configured correctly.

The application will list the PIN Pad on the Lane Management page. Additional PIN Pad devices may be added for stores with more than one checkout station.

Devices

Secure Card Reader

The application is certified to support select MagTek USB-enabled card readers and P2PE 2.0 Validated IDTech SREDKey device. Device availability is based on each OEM manufacture inventory, product lifecycle, and hardware distributor stock. Please check with your Worldpay sales and support representative to ensure confirm inventory availability before ordering peripheral devices. Part numbers may vary by hardware distributor, please work with your Worldpay sales and support agent to ensure equipment ordering is correct before shipment.

OmniFlex supports USB-enabled encrypted card readers which can be purchased from an approved key injection facility (KIF) and distributor such as POS Portal, The Phoenix Group and JR's POS Depot. Worldpay recommends using a P2PE Validated encrypted devices from our P2PE Validated KIFs, POS Portal and The Phoenix Group.

OEM	Model	Part #	MSR	EMV	Encryption	Method	Website
MAGTEK	Mini/wedge	21040108	Yes	No	No	USB	Brochure
MAGTEK	Dynamag	21073062	Yes	No	Yes	USB	Brochure
IDTECH	SREDKey XML KB	IDSK – 534833TXB	Yes	No	Yes	USB	Brochure
Encryption Key Part Numbers							
POS Portal	Dynamag Device Encryption	90101900					
POS Portal	SREDKey Device Encryption	6365533E (P2PE Validated) & 63655346 (non-validated)					
Phoenix Group	SREDKey Device Encryption	63655340 (P2PE Validated) & 63655348 (non-validated)					

Device Pictures



MAGTEK Mini/wedge



MAGTEK Dynamag



IDTech SREDKey

IDTech SREDKey Configuration

The application is certified to support **IDTech SREDKey** USB-enabled **P2PE 2.0 Validated** encrypted device for secure card-present transactions at time of swipe, and secure key-entry for card not-present at time of manual entry. Worldpay recommends using a P2PE Validated encrypted devices from our P2PE Validated KIFs, POS Portal and The Phoenix Group.



The IDTech SREDKey device offers a variety of menu options to enable secure entry of sensitive customer information. Card and customer information is encrypted during device capture and output when using the OmniFlexpayment application.


OmniFlex is a secure hosted payment application in combination with the IDTech SREDKey device is designed to maximize PCI compliance while reducing the burden of keyed entry when using a traditional keyboard at the time of sale and is fully P2PE 2.0 validated when purchased from an authorized key injection facility.

Caution: Please keep all anti-virus and malware protection updated throughout your network and desktop workstations.

Menu	Card	Expiry	CVV	Street #	Zip
1	Yes	Yes	-	-	-
2	Yes	Yes	-	-	Yes
3	Yes	Yes	-	Yes	Yes
4	Yes	Yes	Yes	-	Yes
5	Yes	Yes	Yes	Yes	Yes
6	Yes	Yes	Yes	-	-


IDTech Augusta

The application is certified to support the USB-enabled **IDTech Augusta** smart card reader for EMV acceptance with fallback to MSR card “swipe” capability. Device availability is based on each OEM manufacture inventory and Worldpay authorized hardware distributor stock. Please check with your account representative to confirm inventory availability before ordering peripheral devices. The IDTech Augusta device is available from the following Worldpay authorized key injection facilities and hardware distributorships.

IDTECH Augusta Smart Card Reader							
Item Description:		IDT, Augusta, Encrypting, USB-HID, v4, Smart Card Reader, New					
OEM	Model	Part #	MSR	EMV	P2P	Type	Website
IDTECH	Augusta	IDEM-251P	Yes	Yes	Yes	USB-HID	Brochure
	Build Type	Production					
	Version	v4.0					
	Firmware	V1.02.007 or Higher					
	Software Load	“Validate-HPAugustaKB Certified Config. JSON”					
	Distributors	POS Portal					
	Processor	Worldpay (Vantiv)	Element				
	Application	Augusta Express KB-Configuration	Express-Augusta				
	Device Encryption	KSI 63655346 (data variant) – POS Portal non-validated IDTech P2P key	KSI 63655348 (data variant) – TPG non-validated IDTech P2P key				
	Encrypted for:	Data – EPS IDTECH 48 TDES	Injection Drop Down: 741B				

Ingenico PIN Pad

The application supports various EMV chip-enabled secure PIN Pads for EMV Credit and Debit acceptance. Part numbers may vary by distributor, please work with your Worldpay from FIS sales and support agent to ensure equipment ordering is correct before shipment.

OEM	Model	Part #	MSR	EMV	Encryption	Method	Website	
Ingenico	iPP320, triPOS Cloud Edition	iPP320-11P2391A IPP 320 PCI v3 + EMV + CTLS/NFC	Yes	Yes	Yes	IP	Website	
Ingenico	Power Supply	179901469						
Ingenico	iPP320 Ethernet Cable	296114829AB						
Ingenico	BASE RBA 21.0.2	PKRGEN04-210002B3						
Ingenico	Data Package	DP-RVNT04-210202						

PIN Pad Installation

Prerequisites

There are a few things to consider in advance of the PIN Pad installation.

You will need a dedicated IP-Ethernet LAN connection available on the back of your modem or Wi-Fi router. The device will need to be located near a power outlet. Your modem, Wi-Fi and network must have Port 443 and Port 9001 open and available to the Internet. Please check with your ISP (internet service provider) or network administrator before installing this device. Considering where your modem or Wi-Fi router is in relation to your PC checkout station you may consider purchasing one or few of the following items to ensure you have the best placement on your countertop:

- The Ingenico iPP320 device will plug directly into an available IP-Ethernet port on the back of your modem or Wi-Fi router and has a very short cable to do so. You may consider purchasing a CAT/RJ45 coupler to offer more cable range located [here](#).
- If you need extended IP-Ethernet cables, a good choice is MediaBridge CAT6 cables located [here](#).
- If you don't have enough IP-Ethernet ports on the back of your modem or Wi-Fi router, consider purchasing an IP-port extender, by Net Gear located [here](#). These are generally "plug-n-play" devices.

PIN Pad Connection

The device will come pre-configured to work with the OmniFlex application. The PIN Pad will power cycle through a few screens during the boot cycle, once the device is successfully connected to the Internet the PIN Pad will display the required **Activation Code** for immediate entry to [Lane Management](#). The Activation Code is required to active the PIN Pad and to pair it with the application.

Expected Result

The PIN Pad will power cycle through a few screens during the boot cycle once the device is successfully connected to the Internet the PIN Pad will display the required Activation Code for immediate entry to [Lane Management](#). The Activation Code is critical to active the PIN Pad and to pair it with the application. After the Activation Code is entered to the application and successfully paired, the PIN Pad is now activated and will display the triPOS™ logo. *You're ready to begin your first EMV transaction!*

Negative Result

If the PIN Pad device is not successfully connected, the device will not display the Activation Code. The device may display “Network not available...Restarting” messages, or most commonly immediately display the triPOS™ logo shortly-after completing the boot-cycle. If you experience any of these negative results, the device is neither connected nor receiving access to the Internet. Please refer to your Internet settings, check all hardware connections and verify your system configurations so the device can reach an Internet connection. This may require opening Port: 443 and Port 9001 by your systems administrator so the PIN Pad can connect to the Internet.

Important: Displaying the triPOS™ logo immediately after power cycling the device is misleading since this is an expected result after successfully entering the Activation Code and paring the device to the application. First time installers may believe the PIN Pad is already paired and activated when it' not. **Please contact Worldpay from FIS customer service specialist at 1-800-808-6394 for installation assistance.**

Note: If you have a complex business network with firewall rules, anti-virus and port protection – you may need to consult with your IT resources to assist with the device installation. Worldpay from FIS is unable to assist with complex networking due to risk and liability.

How to add additional PIN Pads?

The Lane Management features enables Merchants to associate additional locations to one device; enabling users to [Change Merchant](#) and run transactions on behalf of other store locations using the same PIN Pad device. This is common for retail stores with one or more checkout stations, or headquarters that want the ability to accept payments on behalf of their stores or ledgers.

To begin, select the Lane ID from the list of device names on the Lane Management page.

1. Select, **GENERATE ACTIVATION CODE** to display a new secure key on the device.
2. Copy the displayed number located in the Activation Code dialogue box.
3. [Change Merchant](#) to the store location you would like to add a new lane
4. Select Settings > Lane Management from the left navigation toolbar
5. Select the **ADD LANE** button and Paste the Activation Code into the field
6. Complete the remaining fields and **SAVE**

The device is now configured for the original location and the new second store location. You may continue the above process to add additional store location to a single device.

Device Reactivation

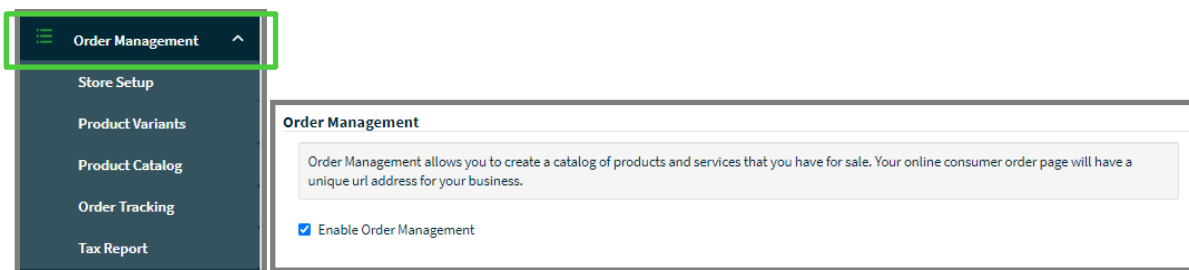
The application enables users to **Generate Activation Codes** or removes existing devices from the [Lane Management](#) page. This is commonly used as a method to reboot the PIN Pad in accordance to PCI 4.0¹ best practices, manage existing devices during a loss of power or an IP-Ethernet connection and when removing devices to add replacement units when necessary.

¹*Ingenico iPP320 and iPP350 v4 devices will automatically reboot every (24) hours and does not require the PIN Pad to be reactivated.*

Order Management

Order Management allows a Merchant to create a catalog of products and services they have for sale. The Merchant can provide their consumers the URL to their store to create an online order and make immediate payment without the need of a traditional integrated shopping cart.

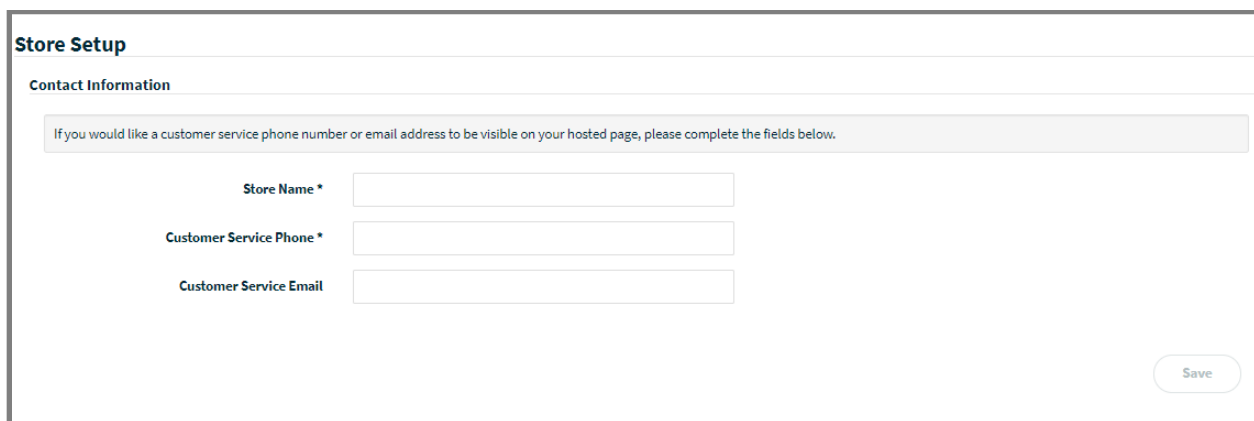
Before a Merchant can use the Order Management feature, the Account Owner must enable this capability from the Terminal Setup page here. Once enabled the Order Management option will be visible on the left navigation bar.



Store Setup

Merchants should begin with the setup of their online store.

From the left navigation bar go to [Order Management](#) and select [Store Setup](#).

A screenshot of the 'Store Setup' form. The form has a title 'Store Setup' and a section 'Contact Information'. Below the section title is a grey box with the text: 'If you would like a customer service phone number or email address to be visible on your hosted page, please complete the fields below.' There are three input fields: 'Store Name *', 'Customer Service Phone *', and 'Customer Service Email'. A 'Save' button is located at the bottom right of the form.

1. **Store Name:** Enter the name of your store that will be displayed on the website. This is a required field.
2. **Customer Service Phone:** Enter a telephone number where consumers can contact about order(s) placed online on items purchased. This is a required field.
3. **Customer Service Email:** Enter an email address where consumers can contact about order(s) placed online on items purchased. This is an optional field.

Once the fields above have been populated the **Save** button will be enabled, enabling the Merchant to proceed to the next step to complete the settings section.

Store Settings

Once the initial [Store Setup](#) fields have been **Saved**, the page will display additional Store Setting about your online store. Once configured, the Merchant can begin to create their product(s) and service(s) catalog.

Activate Store

Select **“Activate my store”** to display the online store to the public. We recommend activating the online store after you have added new products and completed the remaining [Store Settings](#) before selecting this option.

Order Page URL

The public URL address is located under the **Order Page URL** section, which Merchants can preview how the new store will appear to consumers.

Store Setup

Contact Information

If you would like a customer service phone number or email address to be visible on your hosted page, please complete the fields below.

Store Name *

Customer Service Phone *

Customer Service Email

Activate my store

Order Page Url

[Click to preview.](#)

<https://www.qa01.virtualterminal.com/#/order/merchant/d40de24d-091a-42c1-90c1-eafbe3b71ead>

Order Pickup

Enable this setting to allow customers to pick up a completed order.

Allow Order Pickup

Tips

Enable this setting to allow customers to add a tip to an order during the checkout process.

Allow for Tips

Free Shipping

This setting allows your account to enable/disable Free Shipping & provide Minimum Amount.

Allow Free Shipping

Save

Order Pickup

If the Merchant wants to allow consumer **Pickup**, they can enable this setting. Once enabled the consumer will have the ability to select “Pickup” during the checkout process.

Order Pickup

Enable this setting to allow customers to pick up a completed order.

Allow Order Pickup

Tips

If the Merchant wants to allow consumer **Gratuity**, they can enable this setting. Once enabled the consumer will have the ability to enter a tip amount during the checkout process.

Tips

Enable this setting to allow customers to add a tip to an order during the checkout process.

Allow for Tips

Free Shipping

If the Merchant wants to offer **Free Shipping** when an order reaches a minimum amount, they can enable this setting.

Free Shipping

This setting allows your account to enable/disable Free Shipping & provide Minimum Amount.

Allow Free Shipping Minimum Amount

Shipping Options

Merchants will have the ability to offer various **Shipping** options. The application will display the **Label** field on the consumer checkout page.

Shipping Options Add

Name	Type	Label	Rate	Active
Express	Flat	1-2 Days	\$ 7.95	<input checked="" type="checkbox"/>
Standard	Flat	3-5 Days	\$ 5.95	<input checked="" type="checkbox"/>

Tax Options

Merchants will have the ability to setup various **Tax Options**. The application will display the **Label** field on the consumer checkout page.

The screenshot shows a table titled "Tax Options" with the following data:

Label	Type	Rate	Active
Local	Percent	6.5 %	<input checked="" type="checkbox"/>

An "Add" button is visible in the top right corner of the table area.

Once the settings sections have been completed, the Merchant can begin to create their product and services catalog.

Product Variants

Product Variant can be applied to items that are available for purchase. Examples includes size, color or restaurants may choose to represent available toppings or condiments. A Merchant can use the **Product Variant** page to create unique templates which can be applied to multiple products.

The screenshot shows the "Product Variants" management page. It includes a filter input, a dropdown for "5 items per page", and a "New Variant" button highlighted with a green box. Below the buttons is a table with the following headers: Variant Name, Display Name, Type, Required, Enabled, and Edit. The table currently displays "No Variants available".

To create, click on the **New Variant** button.

The screenshot shows the "New Variant" form with the following fields:

- Variant Name ***: Text input containing "Steak Temperatures"
- Display Name ***: Text input containing "Temperature"
- Type**: Dropdown menu set to "Dropdown"
- Variant Items:** Section with an "Add Item" button highlighted in a green box.
- Buttons at the bottom: "Close" and "Save Variant".

Click on the **"Add Item"** button to create options for the variant.

1. **Variant Name**: enter the product variant name, this will not be visible to consumers
2. **Display Name**: enter the product variant name, this will be visible to consumers
3. **Type**: choose Dropdown or Textbox, this will be how your customer selects the product attribute

Variant Items

Select the “**Add Item**” button to create optional attributes. In this example we are creating a template which will allow a consumer(s) to select a temperature when ordering a steak. When complete, select the “**Save Variant**” button to continue or click the **Close** button to cancel.

New Variant

Variant Name * Steak Temperatures

Display Name * Temperature

Type Dropdown

Variant Items:

- Rare
- Medium Rare
- Well Done

Close Save Variant Add Item

Once **saved** the Product Variant will be displayed in the list. Product Variants can be marked as required and can be **Enabled** or **Disabled** at any time. To **Edit** a variant, select the pencil icon.

Product Variants

Add variants for products that come in multiple versions, for example sizes or colors. To modify a variant click the edit pencil.

Filter 30 items per page New Variant

Variant Name	Display Name	Type	Required	Enabled	Edit
Steak Temperatures	Temperature	Dropdown	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Potato Toppings	Sour Cream	Dropdown	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Potato Toppings	Cheddar Cheese	Dropdown	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Potato Toppings	Bacon	Dropdown	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Steak Toppings	Grilled Mushrooms	Dropdown	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Steak Toppings	Grilled Onions	Dropdown	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Pizza Toppings	Pepperoni	Dropdown	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Pizza Toppings	Mushrooms	Dropdown	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
Pizza Toppings	Extra Cheese	Dropdown	<input type="checkbox"/>	<input checked="" type="checkbox"/>	

Product Catalog

Now that you have some variant templates created you can begin creating products in the **Product Catalog**. Click on the **Add** button to create a new **Product**.

Product Catalog [Return To List](#)

Add new Product or Service Details

Product #

Product Name *

Description

Price

Taxable

* indicates a required field.

[Save Product](#)

This product comes in multiple versions, for example sizes or colors.

Variants

Add Product

There are two steps when creating a **Product**. Step one is to create/add the product to the **Product Catalog**.

1. **Product #**: assign a number to the product, Merchants can use this to enter a UPC code
2. **Product Name**: name the product, this will be visible in the online store
3. **Description**: provide a description of the product you are selling, this will be visible in the online store
4. **Price**: enter the cost of the item (unit price)
5. **Taxable**: select this box if the item you are selling is taxable

Click **Save Product** to continue or select "**Return To List**" to go back to the **Product Catalog** main page.

When a product is initially created it will default to a status of "**Pending**" which means it is not visible in the online store.

- If there are not multiple options available for the product, you can change the product to **Active**.
- If there are multiple options available, go to step two.

Apply Variant

The second step in creating a product is to apply **Variants**. Select the **Variants** bar to display all available variants. To “**Apply Variant to Product**”, check the box on the row associated to the variant you want.

This product comes in multiple versions, for example sizes or colors.

Variants

Select 'Apply Variant' to attach a variant to this product.
To modify the variant items for this product click the edit pencil.
To add a brand new variant click the 'New Variant' button. Note: new variants are available for use across all products.

Filter 30 items per page New Variant

Apply Variant to Product	Variant Name	Display Name	Type	Edit
<input type="checkbox"/>	Steak Temperatures	Temperature	Dropdown	
<input type="checkbox"/>	Potato Toppings	Sour Cream	Dropdown	
<input type="checkbox"/>	Potato Toppings	Cheddar Cheese	Dropdown	
<input type="checkbox"/>	Potato Toppings	Bacon	Dropdown	
<input type="checkbox"/>	Steak Toppings	Grilled Mushrooms	Dropdown	
<input type="checkbox"/>	Steak Toppings	Grilled Onions	Dropdown	
<input type="checkbox"/>	Pizza Toppings	Pepperoni	Dropdown	
<input type="checkbox"/>	Pizza Toppings	Mushrooms	Dropdown	
<input type="checkbox"/>	Pizza Toppings	Extra Cheese	Dropdown	

For this example, we added a 'Grilled 16oz. T-bone steak' to our **Product Catalog** and applied the steak temperatures **Variants**. Once you have applied all the variants to a product, return to the top section and update the **Status** to "Active".

Product Name *

Description

Price

Taxable

Status

* indicates a required field.

[Save Product](#)

This product comes in multiple versions, for example sizes or colors.

Variants

Select 'Apply Variant' to attach a variant to this product.
To modify the variant items for this product click the edit pencil.
To add a brand new variant click the 'New Variant' button. Note: new variants are available for use across all products.

Filter 5 items per page [New Variant](#)

Apply Variant to Product	Variant Name	Display Name	Type	Edit
<input checked="" type="checkbox"/>	Steak Temperatures	Temperature	Dropdown	
<input type="checkbox"/>	Potato Toppings	Sour Cream	Dropdown	
<input type="checkbox"/>	Potato Toppings	Cheddar Cheese	Dropdown	
<input type="checkbox"/>	Potato Toppings	Bacon	Dropdown	
<input type="checkbox"/>	Steak Toppings	Grilled Mushrooms	Dropdown	

<< < 1 2 > >>

Once all products are created you can return to the [Store Setup](#) and select "Activate my store" to publish your store online. If a Merchant wants to see how products will appear in the online store, copy the URL address into a browser's address field or from the [Product Catalog](#) page you can click the **Preview** button.

Order Page Url

<https://cert.virtualterminal.com/#/order/merchant/27145837-6367-404d-b7bf-962fd6156559>

Online Store

Creating an Order

From the online store consumers can select products for purchase.

The screenshot displays the online store interface for MAMA G'S BAR & GRILL. At the top left, the logo for worldpay from FIS and OmniFlex is visible. Below the logo is a search bar. The main content area lists five items, each with a description, price, and options. A green box highlights the options and 'Add to Order' button for each item.

Item Name	Description	Price	Options	Action
T-Bone Steak	Grilled 16oz. T-Bone Steak	\$22.95	Temperature: Select ▾ Grilled Mushrooms: Select ▾ Grilled Onions: Select ▾	- 1 + Add to Order
Porterhouse Steak	Grilled 22oz Porterhouse Steak	\$29.95	Temperature: Select ▾ Grilled Mushrooms: Select ▾ Grilled Onions: Select ▾	- 1 + Add to Order
Baked Potato	Baked Potato	\$5.95	Sour Cream: Select ▾ Cheddar Cheese: Select ▾ Bacon: Select ▾	- 1 + Add to Order
Grilled Pizza	10 Inch Grilled Pizza	\$12.95	Pepperoni: Select ▾ Mushrooms: Select ▾ Extra Cheese: Select ▾	- 1 + Add to Order
House Salad	House salad with tomatoes, cheese, cucumber, and onion	\$3.95	Salad Dressings: Select ▾	- 1 + Add to Order

10 ▾ items per page

In keeping with the theme with the example, the consumer is ordering a T-bone steak, cooked medium rare with baked potato, sour cream and bacon. The consumer has chosen to add a house salad with ranch dressing.

Click the **Add to Order** button next to each item to create the order.

As items are added to the order, the **Order Summary** will display the Subtotal for the order. Once all selections are made click the **Proceed to Checkout** button.

The screenshot displays the worldpay OmniFlex interface for MAMA G'S BAR & GRILL. The main menu lists several items with their prices and customization options:

- T-Bone Steak**: Grilled 16oz. T-Bone Steak, \$22.95. Options: Temperature (Medium Rare), Grilled Mushrooms (Yes), Grilled Onions (No).
- Porterhouse Steak**: Grilled 22oz Porterhouse Steak, \$29.95. Options: Temperature (Select), Grilled Mushrooms (Select), Grilled Onions (Select).
- Baked Potato**: Baked Potato, \$5.95. Options: Sour Cream (Select), Cheddar Cheese (Select), Bacon (Select).
- Grilled Pizza**: 10 Inch Grilled Pizza, \$12.95. Options: Peppercorn (Select), Mushrooms (Select), Extra Cheese (Select).
- House Salad**: House salad with tomatoes, cheese, cucumber, and onion, \$3.95. Option: Salad Dressings (Select).

An **Order Summary** sidebar is highlighted with a green border, showing the items added to the order:

- T-Bone Steak**: Grilled 16oz. T-Bone Steak, Temperature: Medium Rare, Grilled Mushrooms: Yes, Grilled Onions: No, Qty: 1, \$22.95.
- Baked Potato**: Baked Potato, Sour Cream: Yes, Cheddar Cheese: No, Bacon: Yes, Qty: 1, \$5.95.
- House Salad**: House salad with tomatoes, cheese, cucumber, and onion, Salad Dressings: Ranch, Qty: 1, \$3.95.

The Order Summary shows a **Subtotal (3 items) : \$32.85** and a **Proceed to Checkout** button.

Checkout

The checkout page is divided into three primary sections.

Order Summary

The top section of the page displays the summary of the total order. Continuing with the example, the consumer can select delivery or pickup and include gratuity to the **Order Total**.

MAMA G'S BAR & GRILL	
Checkout	
Order ID: 11	
Items	
1.	T-Bone Steak \$22.95 Grilled 16oz. T-Bone Steak Temperature: Medium Rare Grilled Mushrooms: Yes Grilled Onions: No Quantity: 1 \$22.95
2.	Baked Potato \$5.95 Baked Potato Sour Cream: Yes Cheddar Cheese: No Bacon: Yes Quantity: 1 \$5.95
3.	House Salad \$3.95 House salad with tomatoes, cheese, cucumber, and onion Salad Dressings: Ranch Quantity: 1 \$3.95
Sub Total Amount \$32.85 <input type="radio"/> Delivery <input checked="" type="radio"/> Pickup Local \$2.14 Tip Amount <input type="text" value="\$5.00"/> Order Total \$39.99	

Billing Information

The lower left section of the checkout page displays the **Billing Information**. The **Billing Name*** and **Billing Phone*** fields are required so that the Merchant has the consumers contact information.

Billing Information

Billing Name *

Billing Phone *

Street Address

City

State

Zip Code

* indicates a required field.

Payment Information

The lower right section of the checkout page displays the **Payment Information**.

Payment Information

Card Number *

Expiration Date *

CVV

I agree to receive a copy of my order via email

Email *

Consumer who want to receive a copy of their order sent to a valid email address, select:

- I agree to receive a copy of my order via email**

Place Order

Once all payment information has been entered click the **Place Order** button.

The checkout page will display a message stating the order has been placed and a transaction receipt is generated. The consumer is given the option to print the receipt, or they can click the **OK** button to close the receipt window.

Transaction Receipt

Acceptor ID	
Response	Approved
Host Response Code	00
Date	10/18/2020 7:48:38 AM CST
Customer Name	Regina Kincaid
Transaction ID	865003148
Transaction Type	Credit Card Authorization
Approval Code	502451
Card Number	xxxx-xxxx-xxxx-1111
Card Type	Visa
Approved Amount	39.99
CVV Response	Not Processed

[Print Customer Receipt](#) [Ok](#)

Order Confirmation

The consumer is shown an **Order Confirmation** which displays the Merchant contact phone number and/or email address (Note: This information is being pulled from the [Store Setup](#) page.)

Order Confirmation

Order number 11 has been placed.

To cancel or edit this order, please contact **Mama G's Bar & Grill** at **111-222-3333** or **mamags@outlook.com**.

[Close](#)

Order Tracking

To view incoming orders, the Merchant can go to the **Order Tracking** on the left navigation menu. When an order is initially submitted the order status will default to pending.

Order Details

Order Id	Customer Name	Order Date (CST)	Amount	Transaction Id	Order Status
13	Joe Smith	10/18/20 8:01 AM	\$76.47	865003150	Pending
12	Mary Jane	10/18/20 8:00 AM	\$18.00	865003149	Cancelled
11	Regina Kincaid	10/18/20 7:36 AM	\$39.99	865003148	Pending

View Details

To view the details of an order, select the row and click on the **View** button. This will display the details of each item included in the order. The lower left section of the page will display the **Shipping Information** (or **Pickup**). The lower right section of the page will display the consumers **Payment Information**.

Order ID: 11 Update Order Status Pending

Items

<p>1. T-Bone Steak Grilled 16oz. T-Bone Steak Temperature: Medium Rare Grilled Mushrooms: Yes Grilled Onions: No</p>	Quantity	1 @ \$22.95 \$22.95
<p>2. Baked Potato Baked Potato Sour Cream: Yes Cheddar Cheese: No Bacon: Yes</p>	Quantity	1 @ \$5.95 \$5.95
<p>3. House Salad House salad with tomatoes, cheese, cucumber, and onion Salad Dressings: Ranch</p>	Quantity	1 @ \$3.95 \$3.95
		Taxes
		Local \$2.14
		Shipping
		\$0.00
		Tip
		\$5.00
		Total
		\$39.99

Pickup Order - Customer Information

Regina Kincaid

Tel: 111-222-3333
Email: regina.kincaid@fisglobal.com

Payment Information

Card Last 4 numbers: 1111
Transaction ID: 865003148

Print Order Details
Reverse
Capture

Update Order Status

Once the Merchant prepares order fulfilment, they can change the status of the order at the top of the [Order Details](#) page.

1. **Pending:** default status for all orders when **submitted**
2. **In-Progress:** use this status to show the order is being **prepared**
3. **Completed:** use this status to show the order has been **fulfilled**
4. **Canceled:** use this status if the order has been **canceled**

Order ID: 11

Update Order Status
Pending ▾

Items

<p>1. T-Bone Steak Grilled 16oz. T-Bone Steak Temperature: Medium Rare Grilled Mushrooms: Yes Grilled Onions: No</p>	Quantity	1 @ \$22.95 \$22.95
<hr/>		
<p>2. Baked Potato Baked Potato Sour Cream: Yes Cheddar Cheese: No Bacon: Yes</p>	Quantity	1 @ \$5.95 \$5.95
<hr/>		
<p>3. House Salad House salad with tomatoes, cheese, cucumber, and onion Salad Dressings: Ranch</p>	Quantity	1 @ \$3.95 \$3.95
<hr/>		
	Taxes	Local \$2.14
	Shipping	\$0.00
	Tip	\$5.00
	Total	\$39.99

Pickup Order - Customer Information

Regina Kincaid

Tel: 111-222-3333
Email: regina.kincaid@fisglobal.com

Payment Information

Card Last 4 numbers: 1111
Transaction ID: 865003148

Print Order Details
Reverse
Capture

Capture

All transactions are being processed as a “**Credit Card Authorization**” request; therefore, the Merchant is required to **Capture** the sale after it has been fulfilled. Payment Capture can be performed from the [Order Details](#) page or by navigating to the [Update Transaction](#) page. If an order has been canceled, the Merchant should **Reverse** the transaction. Reversal can be performed from the [Order Details](#) page or by navigating to the [Update Transaction](#) page.

Tax Report

The **Tax Report** page allows a Merchant to export a financial report of all taxes collected from online orders. A report can be generated for orders that have been processed within the 12 months.

Enter the **Date Range** and select the **Export Report in CSV** button.

Tax Report

Start Date

End Date

[Export Report in CSV](#)

Tax Report Data

OMNIFLEX						
Order Tax Report						
Oct 18 2020 to Oct 18 2020						
TaxYear	TaxMonth	TaxType	TaxLabel	TaxRateCharged	TaxableAmount	TaxCollected
2020	10	Percent	Local	6.5	32.85	2.14
					Total	2.14

1. **Tax Year:** the year selected in the date range
2. **Tax Month:** the two-digit numeric value for the month selected in the date range
3. **Tax Type:** displays the tax calculated as a percentage
4. **Tax Label:** displays the label entered on the [Store Setup](#), tax field
5. **Tax Rate Charged:** displays the tax rate entered on the [Store Setup](#), tax rate field
6. **Taxable Amount:** the total amount of a specific order (within the date range entered)
7. **Tax Collected:** the calculation of **TaxRateCharged** multiplied by the **TaxableAmount**

Transaction Status

OmniFlex		Actions					Transaction Status										
Transaction Type	Description	Capture	Reverse	Return	Void	Adjustment	Approved	Success	Decline	Error	Void	Authorized	Auth-complete	Reversed	Pending	Settled	Rejected
Credit																	
Sale	Capture a transaction for settlement.		*	*	*		*		*		*			*		*	*
Authorization	Authorization to hold funds on the card (capture for settlement later)	*	*			*			*			*	*	*			
Auth-complete	Capture prior authorization for settlement		*	*	*	*	*		*	*				*		*	*
Credit	swiped or keyed, requires full cc#, not tied to an original transaction				*		*				*					*	*
Return	Refund a transaction up to 120 days from original authorization				*		*				*					*	*
Void	Cancel a same day transaction before settlement							*									
AVS	Perform address verification on Billing Zip Code							*									
Reversal	Release funds held on prior authorization							*									
Force	Requires prior voice authorization, approval code to force capture for settlement.			*	*			*			*					*	*

User Roles & Permissions

Additional **Roles and Permission** will be released in the future providing more flexibility within the application to control users at the Merchant location.

Card Transactions

Credit Card Transactions	VTPAppAdmin	Root	Boarding	Support	Account Owner	Account Administrator	Report Analyst	Cashier	Manager
Process									
Sale	●	●	●	●	●	●	●	●	●
Authorization	●	●	●	●	●	●	●	●	●
AVS Only	●	●	●	●	●	●	●	●	●
Force Sale	●	●	●	●	●	●	●	●	●
Credit	●	●	●	●	●	●	●	●	●
Level III	●	●	●	●	●	●	●	●	●
Group Payments									
Process via Group Payments	●	●	●	●	●	●	●	●	●
Update Transaction									
Capture	●	●	●	●	●	●	●	●	●
Return	●	●	●	●	●	●	●	●	●
Void	●	●	●	●	●	●	●	●	●
Reverse	●	●	●	●	●	●	●	●	●
Rebill	●	●	●	●	●	●	●	●	●
Partial Approvals	●	●	●	●	●	●	●	●	●
Receipts	●	●	●	●	●	●	●	●	●
Reporting									
Transaction Reports	●	●	●	●	●	●	●	●	●
Recurring Payments									
Manage Payments	●	●	●	●	●	●	●	●	●
Search Payments	●	●	●	●	●	●	●	●	●
Failed Payments	●	●	●	●	●	●	●	●	●
Partial Approvals									
Enable in Terminal Setup	●	●	●	●	●	●	●	●	●
Account Updater									
Enable in Terminal Setup	●	●	●	●	●	●	●	●	●
Submit a Card for Update	●	●	●	●	●	●	●	●	●
Settings (Merchant)									
Account Profile	●	●	●	●	●	●	●	●	●
Terminal Setup	●	●	●	●	●	●	●	●	●

Check Transactions

Check Transactions	VTPAppAdmin	Root	Boarding	Support	Account Owner	Account Administrator	Report Analyst	Cashier	Manager
Process									
Check Sale	●	●	●	●	●	●	●	●	●
Check Credit	●	●	●	●	●	●	●	●	●
Update Transaction									
Return	●	●	●	●	●	●	●	●	●
Void	●	●	●	●	●	●	●	●	●
Receipts	●	●	●	●	●	●	●	●	●
Reporting									
Transaction Reports	●	●	●	●	●	●	●	●	●
Recurring Payments									
Manage Payments	●	●	●	●	●	●	●	●	●
Search Payments	●	●	●	●	●	●	●	●	●
Failed Payments	●	●	●	●	●	●	●	●	●

Gift Transactions

Gift Transactions	VTPAdmin	Root	Boarding	Support	Account Owner	Account Administrator	Report Analyst	Cashier	Manager
Process									
Gift Sale	●	●	●	●	●	●	●	●	●
Activate	●	●	●	●	●	●	●	●	●
Reload	●	●	●	●	●	●	●	●	●
Balance Inquiry	●	●	●	●	●	●	●	●	●
Credit	●	●	●	●	●	●	●	●	●
Update Transaction									
Refund	●	●	●	●	●	●	●	●	●
Void	●	●	●	●	●	●	●	●	●
Reverse	●	●	●	●	●	●	●	●	●
Reporting									
Transaction Reports	●	●	●	●	●	●	●	●	●

Cash Transactions

Cash Transactions	VTPAdmin	Root	Boarding	Support	Account Owner	Account Administrator	Report Analyst	Cashier	Manager
Process									
Sale	●	●	●	●	●	●	●	●	●
Update Transaction									
Return	●	●	●	●	●	●	●	●	●
Void	●	●	●	●	●	●	●	●	●
Receipt	●	●	●	●	●	●	●	●	●

Application Support

Have a question?

Card Services

To schedule an outbound service telephone call by appointment, please visit the [Support Hub](#) resource center. Here you can schedule a call with a technical support specialist at a time that is convenient for you. Worldpay recommends contacting the customer service telephone number listed on your bankcard statement or call **1-800-808-6394**. We're available Monday through Friday, from 8 am - 8 pm ET to assist you.

Activation Support

When your Worldpay Merchant services account is approved the customer service activation specialist, or your sales agent will contact you to setup initial application training with your business. If you would like to schedule an activation call, please contact the customer service telephone listed on your monthly processing statement, or schedule an appointment [here](#). We are available Monday through Friday, from 8 am - 8 pm ET to assist you.

Check Payments

When you need check services support, please have your (6) digit CHECKMID ready to call Check Commerce at **1-888-263-0467**, Monday - Friday 8AM to 5PM MST. You can also email Check Commerce at RM@CheckCommerce.com, a Check Commerce representative will contact you within 48 business hours.

Training

Worldpay from FIS representatives are extremely knowledgeable in the products and services recommended to our customers, each available to demonstrate the value proposition and how it will benefit your business.

To learn more about OmniFlex, or to receive training – please contact your Worldpay from FIS representative today!