valorpaytech.com

Quick Reference Guide

VIRTUAL Terminal

VALOR PAYTECH

SALE

1. Enter the Transaction Amount.
2. Enter the Phone Number or Email Address.
3. Enter the Credit card information.
   - Please Note: Credit card information will be tokenized for future transactions.
4. Enter the Invoice Number and/or Description (optional).
5. Scroll down and select Process.
6. Confirm the transaction details on Summary Details window.
   - By clicking on the X and entering the password, you can remove the Non-Cash Charge.
7. Select Process to finalize the transaction.

VOID

1. Go to the Transactions Module on the sidebar menu.
2. Select the vertical ellipsis (⋮) select Void.
3. Enter the Phone Number or Email Address for the receipt (optional).
4. Select Proceed.

REFUND (AGAINST SPECIFIC TRANSACTION)

1. Go to the Transactions Module on the sidebar menu.
2. Select the vertical ellipsis (⋮) and select Issue Refund.
3. Confirm the amount you want to refund.
4. Enter the Phone Number or Email Address for the receipt (optional).
5. Select Proceed.

REFUND

1. Enter the Transaction Amount.
2. Enter the Phone Number or Email Address.
3. Enter the Credit Card information.
   - Please Note: Credit card information will be tokenized for future transactions.
4. Enter the Invoice Number and/or Description (optional).
5. Scroll down and select Process.
6. Confirm transaction details on Summary Details window.
   - By clicking on the X and entering the password, you can remove the Non-Cash Charge.
7. Select Process to finalize the transaction.

PREAUTH

1. Enter the Transaction Amount.
2. Enter the Phone Number or Email Address.
3. Enter the Credit Card information.
   - Please Note: Credit card information will be tokenized for future transactions.
4. Enter the Invoice Number and/or Description (optional).
5. Scroll down and select Process.
6. Confirm transaction details on Summary Details window.
   - By clicking on the X and entering the password, you can remove the Non-Cash Charge.
7. Select Process to finalize the transaction.

E-INVOICE

1. Enter the Transaction Amount.
2. Enter the Phone Number or Email Address.
3. Set an Expiration Date.
4. Enter the Customer Name,Invoice Number and/or Description (optional)
5. Select Send E-Invoice.
   - Pay Now Link
     - Check the Pay Now Link checkbox.
     - Select the Expiration Date or set to Never Expire.
     - You can select Flexible to allow customers to enter the amount of their choice.
     - Scroll down and select Send Pay Now.

CASH

1. Enter the Transaction Amount.
2. Enter the Phone Number or Email Address.
3. Enter the Invoice Number and/or Description (optional).
4. Select Process.

RECURRING BILLING

1. Select Subscription or Installment.
   - Subscription - Set up a recurring bill for a certain amount that can continue for a specified period of time or infinitely.
   - Installment - Set up a recurring bill for a part of specified amount. Customer is billed until that specified amount has been paid.
2. Select the Date you want the payment to be collected every month/week.

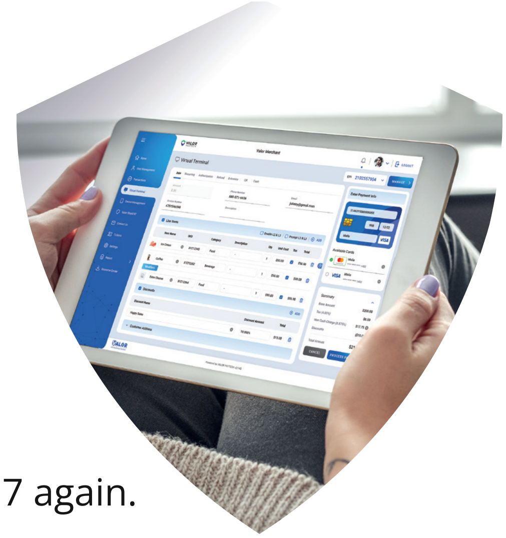
3. Select the Frequency, or how often you want the customer to be billed.
    - Weekly – Charge the customer on a specific day of the week.
    - Bi-Weekly – Charge the customer on alternative weeks, on a specific day of the week.
    - Monthly - Charge the customer on a specific date of the month.
4. In case of Subscription, enter the number of weeks/months the subscription will last or if it will never expire.
   In case of Installment, enter the number of payments required for the total amount to be paid off.

LINE ITEMS

1. Select the checkbox that is available for Line Items.
2. If you have already added Products (My Settings > Product Settings), then select one of the SKUs in the dropdown or manually enter the SKU, Category, Description, QTY, Unit Cost, and Tax.
3. For additional line items, select the + ADD ITEM (+ ADD ITEM).
4. To delete line items, select the Delete Icon ( ).
5. Add discounts by selecting the checkbox for Discounts, then select a discount from the dropdown
    - If there are no discounts in the dropdown, go to My Settings > Discount Settings to add one.

CUSTOMER'S DETAILS

1. Enter the Customer Name.
2. Enter the Street Address.
3. Enter the Street Name.
4. Enter the Unit Number (if any).
5. Enter the Zip Code.
6. Enter the City.
7. Select the State.
8. Select the checkbox, if the Shipping Address and the Billing Address are the same.
9. If the Billing Address is the same, perform steps 1 to 7 again.



BATCH OUT

1. Go to the Transactions Module on the sidebar menu.
2. Select the vertical ellipsis (⋮).
3. Select Open batch.
4. Select Action.
5. Select Batch Out.
6. Confirm the number of transactions and amount.
7. Select Yes to settle the batch.

TIP ADJUST

1. Go to the Transactions Module on the sidebar menu.
2. Select the vertical ellipsis (⁝).
3. Select Open batch.
4. Select Action.
5. Enter the Tip Amount on the Tip Lines.
6. Once the tip adjustment is done, scroll up and select Adjust Tip.
7. Confirm the number of tip adjustments made and select OK.

TICKET

1. Go to the Transactions Module on the sidebar menu.
2. Select the vertical ellipsis (⁝).
3. Select Capture Transaction.
4. Confirm transaction details on Summary Details window.
5. Select Process to finalize the transaction.

MANAGE

1. E-Invoices: Merchants can view records of all E-Invoices sent to customers and their status.
   - By selecting the vertical ellipsis (⁝), the merchant can either resend the E-Invoice to the customer or cancel it.
2. Recurring Billing: Merchants can view records of all Recurring Bills.
   - By selecting the vertical ellipsis (⁝), the merchant can make changes to specific Recurring Bills.
3. Whitelist IP Address: Merchants can create rules to always allow specific IP addresses.
4. API Keys: Merchants can create their APP ID and API Key for their online shopping cart integration.

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