

**global**payments

USER GUIDE

TERMINAL

VERSION 1.0



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## 1. PROCESSING A TRANSACTION

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

The screenshot displays the 'Terminal' section of the Global Payments dashboard. The interface is divided into several sections:

- ORDER DETAILS:** Includes a 'Type\*' dropdown menu set to 'Sale' and an 'Account\*' dropdown menu with 'Select Account'.
- PAYMENT DETAILS:** Contains fields for 'Order ID\*' (with an 'Auto generate Order ID' link), 'Currency\*' (set to '---'), and 'Amount\*' (set to '0.00'). It also includes 'Cardholder Name\*', 'Card Number\*', 'Expiry Date\*' (mm/yy), and 'Security Code\*' (with a 'Not available' checkbox). A checkbox for 'Automatically Settle to the Bank' is checked.
- ADDITIONAL INFORMATION:** Features 'Product ID', 'Customer Number', 'Variable Reference', and a 'Comment' text area.
- BILLING:** A section with a radio button selected.
- SHIPPING:** A section with a radio button and a 'Same as Billing' checkbox.
- SUMMARY:** Shows 'Reallex AF Merchant ID', 'SALE TRANSACTION', a large '0.00' amount, and the date/time '21/02/2018 at 17:31:01'. A blue 'PROCESS >' button is located below the summary.

The left sidebar contains a navigation menu with options like 'MENU', 'DASHBOARD', 'TRANSACTIONS', 'CUSTOMERS', 'TERMINAL', 'FRAUD MANAGEMENT', 'SETTLED', 'REPORTS', 'QUICK LINKS', 'PENDING', 'DELAYED', 'HELD', 'VOIDED', 'FAILED', 'ADMINISTRATION', 'CLIENT SETTINGS', and 'USER MANAGEMENT'. The bottom left corner shows a copyright notice: '© Global Payments 2018 v2.1.113.0-RELEASE'.

The Terminal can be used to process card transactions including:

- Sales
- Refunds
- Manual Transactions
- Card Verification

### 1.1 SALE

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

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

# USER GUIDE

The screenshot shows the 'Terminal' screen in the Global Payments interface. The left sidebar contains a menu with options like 'MENU', 'DASHBOARD', 'TRANSACTIONS', 'CUSTOMERS', 'TERMINAL', 'FRAUD MANAGEMENT', 'SETTLED', 'REPORTS', 'QUICK LINKS', 'PENDING', 'DELAYED', 'HELD', 'VOIDED', 'FAILED', 'ADMINISTRATION', 'CLIENT SETTINGS', and 'USER MANAGEMENT'. The main content area is titled 'TERMINAL' and is divided into several sections: 'ORDER DETAILS' with 'Type\*' (Sale) and 'Account\*' (Select Account); 'PAYMENT DETAILS' with 'Order ID\*', 'Currency\*', 'Amount\*' (0.00), 'Cardholder Name\*', 'Card Number\*', 'Expiry Date\*', and 'Security Code\*' (with a 'Not available' checkbox); and 'ADDITIONAL INFORMATION' with 'Product ID', 'Customer Number', 'Variable Reference', and a 'Comment' field. A 'BILLING' section and a 'SHIPPING' section (with a 'Same as Billing' checkbox) are also visible. A 'SUMMARY' panel on the right shows 'Realex AF Merchant ID', 'SALE TRANSACTION 0.00', and the date '21/02/2018 at 17:31:01'. A 'PROCESS >' button is located at the bottom of the summary panel. The footer includes '© Global Payments 2018 v2.1.113.0-RELEASE'.

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

This screenshot shows the same 'Terminal' screen as above, but with a green confirmation message at the top: 'Sale Successful ( f3d4624306e445828873e20df ) 100.00 EUR'. The message includes 'Auth Code PP8888', 'Security Code Matched', 'AVS Postcode Not Checked', and 'AVS Address Not Checked'. There are 'VIEW TRANSACTION' and 'PRINT RECEIPT' buttons next to the message. The 'ORDER DETAILS' section now shows 'Type\*' (Sale) and 'Account\*' (internet). The 'PAYMENT DETAILS' section remains the same. The 'SUMMARY' panel on the right now shows 'mikael goardet GB Merchant ID: 94357845', 'SALE TRANSACTION 0.00', and the date '22/02/2018 at 08:56:48'. The 'PROCESS >' button is still present at the bottom of the summary panel.

## 1.2 REFUND

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

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

The screenshot shows the 'Terminal' interface for processing a refund. The page is titled 'globalpayments' and includes a search bar and user information. The main content area is divided into several sections:

- ORDER DETAILS:** Includes a 'Type\*' dropdown menu set to 'Refund' and an 'Account\*' dropdown menu set to 'Select Account'.
- PAYMENT DETAILS:** Includes fields for 'Order ID\*' (with an 'Auto generate Order ID' link), 'Currency\*', 'Amount\*' (set to '0.00'), 'Cardholder Name\*', 'Card Number\*', 'Expiry Date\*' (format mm/yy), and 'Security Code\*' (with a 'Not available' checkbox).
- REFUND PASSWORD:** A 'Password\*' field.
- ADDITIONAL INFORMATION:** Includes fields for 'Product ID', 'Customer Number', 'Variable Reference', and a 'Comment' text area.
- SUMMARY:** Displays 'Realex AF Merchant ID:', 'REFUND TRANSACTION', '0.00', and the timestamp '21/02/2018 at 17:31:01'. A blue 'PROCESS >' button is located below the summary.

The left sidebar contains a menu with options: MENU, DASHBOARD, TRANSACTIONS, CUSTOMERS, TERMINAL (highlighted), FRAUD MANAGEMENT, SETTLED, REPORTS, QUICK LINKS, PENDING, DELAYED, HELD, VOIDED, FAILED, ADMINISTRATION, CLIENT SETTINGS, and USER MANAGEMENT. At the bottom left, there are icons for a phone and a document, and the text '© Global Payments 2018 v2.1.113.0-RELEASE'.

### Note:

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

## 1.3 MANUAL

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

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

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

The screenshot shows the 'TERMINAL' interface in the Global Payments system. The page is divided into several sections:

- ORDER DETAILS:** Includes a 'Type\*' dropdown menu set to 'Manual' and an 'Account\*' dropdown menu set to 'Select Account'.
- PAYMENT DETAILS:** Contains fields for 'Order ID\*' (with an 'Auto generate Order ID' link), 'Currency\*' (set to '€'), and 'Amount\*' (set to '0.00'). It also includes 'Cardholder Name\*', 'Card Number\*', 'Expiry Date\*' (mm/yy), and 'Security Code\*' (with a 'Not available' checkbox). A mandatory 'Auth Code\*' field is present at the bottom of this section. A checkbox for 'Automatically Settle to the Bank' is checked.
- ADDITIONAL INFORMATION:** Includes fields for 'Product ID', 'Customer Number', 'Variable Reference', and a large 'Comment' text area.
- SUMMARY:** Displays 'Realex AF Merchant ID', 'MANUAL TRANSACTION', and a large '0.00' amount with the timestamp '21/02/2018 at 17:31:01'. A blue 'PROCESS >' button is located below the summary.

The left sidebar contains a 'MENU' with options like DASHBOARD, TRANSACTIONS, CUSTOMERS, and various reports. The bottom left corner shows the copyright '© Global Payments 2018 v2.1.113.0 RELEASE'.

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

## 1.4 CARD VERIFICATION

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

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

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

The screenshot shows the 'Terminal' screen in the Global Payments system. The interface is divided into several sections:

- Header:** 'globalpayments' logo, 'QUICK SEARCH: Choose Criteria', 'Enter Keyword', and user information 'Relex EDITEDNAME EDITEDAPELLIDO'.
- Left Navigation Menu:** Includes MENU, DASHBOARD, TRANSACTIONS, CUSTOMERS, TERMINAL (highlighted), FRAUD MANAGEMENT, SETTLED, REPORTS, QUICK LINKS, PENDING, DELAYED, HELD, VOIDED, FAILED, ADMINISTRATION, CLIENT SETTINGS, and USER MANAGEMENT.
- Terminal Section:**
  - ORDER DETAILS:** 'Type\*' dropdown set to 'Card Verification', 'Account\*' dropdown set to 'Select Account'.
  - PAYMENT DETAILS:** 'Order ID\*' field with 'Auto generate Order ID' link, 'Cardholder Name\*', 'Card Number\*', 'Expiry Date\*' (mm/yy), and 'Security Code\*' (with 'Not available' checkbox).
  - ADDITIONAL INFORMATION:** 'Product ID', 'Customer Number', 'Variable Reference', and 'Comment' fields.
  - BILLING:** 'Same as Billing' checkbox.
  - SHIPPING:** 'Same as Billing' checkbox.
- Summary Panel:** 'SUMMARY' section showing 'Relex AF' and 'CARD VERIFICATION TRANSACTION' on '21/02/2018 at 17:31:01', with a prominent 'PROCESS >' button.
- Footer:** © Global Payments 2018 v2.1.113.0-RELEASE.

## 2. EXPLANATION OF TERMINAL FIELDS

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





GOT ANY QUESTIONS?

LET US KNOW

## SUPPORT

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