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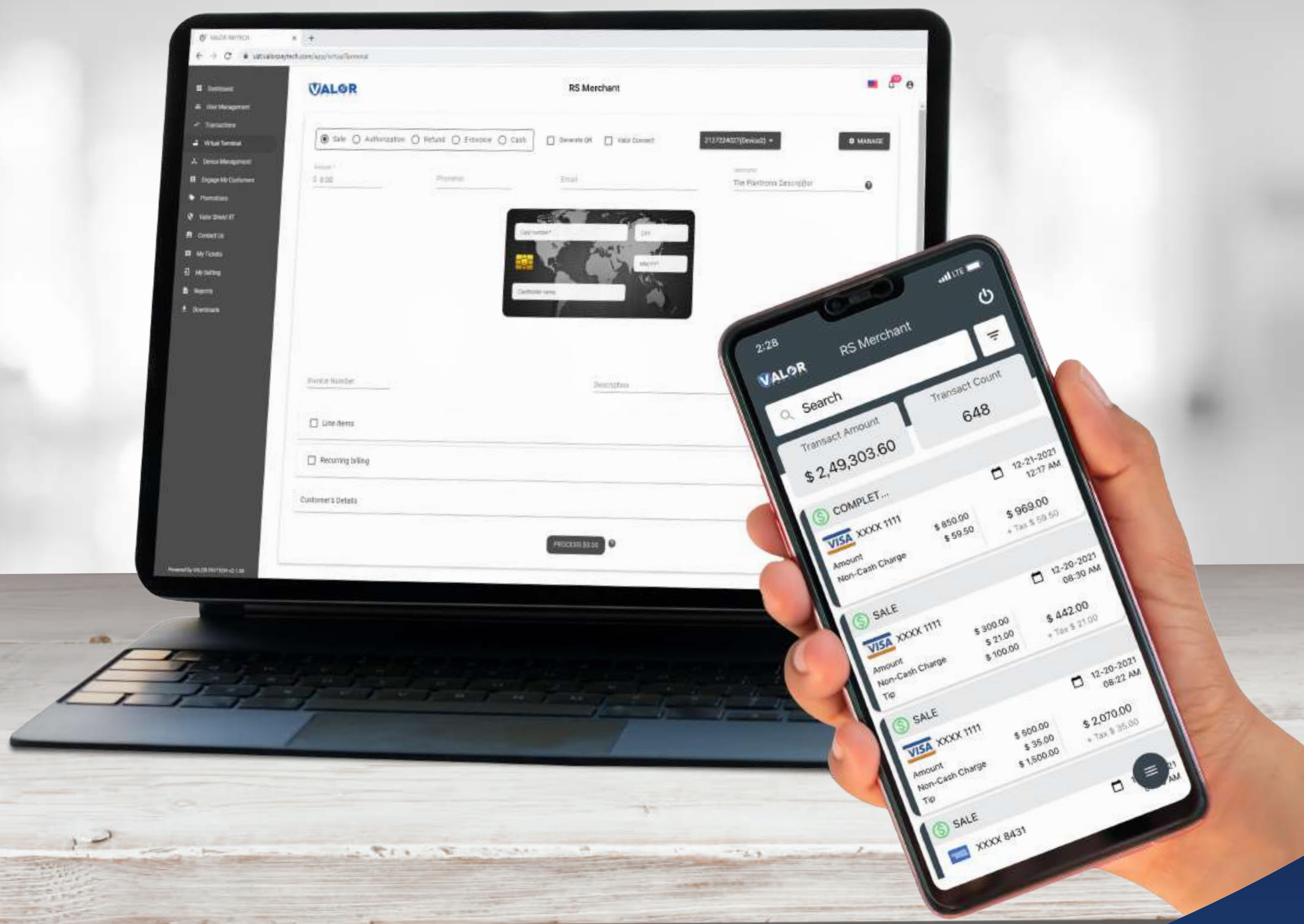
Quick reference guide



VIRTUAL Terminal

VALOR PAYTECH
THE FUTURE OF PAYMENT TECHNOLOGY

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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