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.
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.

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](http://www.virtualterminal.com) login page.
   - If you have a test account, please reset your password at [www.cert.virtualterminal.com](http://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](mailto: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.

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
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.

![Process Credit Card](image)

**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

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.
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.

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.)
**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 account holders.

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.

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.

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:

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

- **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

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.
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.

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

![Email Receipt Example](image-url)
**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.

![Check Enablement](image1)

Enter Check

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

![Check Sale](image2)

- 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.
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
8. Enter Check Number (Optional)
9. Enter Driver License # (Optional)
10. Select Driver License State (Optional)

Enter Billing Information

11. Enter Customer Address
12. Enter Customer City
13. Select State
14. Enter Zip Code
15. Enter Phone Number
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 Table](image)

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.

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.

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](#).

![StoreCard](image)

Process Gift

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

![Process Gift Card](image)

**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

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.

![Group Payments](image)

**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

![Group Payments Entry](image)
Level 2

The remaining fields on the page are optional.

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

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.
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.** ---

---
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.

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.

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.

- **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

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.
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.

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).

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.
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.

---

**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.

---

**Customer Payment Detail**

**Check Payment Methods**

<table>
<thead>
<tr>
<th>Type</th>
<th>Last 4</th>
<th>Routing</th>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Checking</td>
<td>3454</td>
<td>0000124</td>
<td>122 Main St, 1, Denver, CO 80216</td>
</tr>
</tbody>
</table>

**Credit Card Payment Methods**

<table>
<thead>
<tr>
<th>Type</th>
<th>Last 4</th>
<th>Expiration</th>
<th>Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visa</td>
<td>0007</td>
<td>08/20</td>
<td></td>
</tr>
<tr>
<td>Mastercard</td>
<td>2200</td>
<td>08/20</td>
<td></td>
</tr>
</tbody>
</table>

**Recurring Payments**

<table>
<thead>
<tr>
<th>Payment Method</th>
<th>Frequency</th>
<th>Start Date</th>
<th># of Payments</th>
<th>Payments Remaining</th>
<th>Amount</th>
<th>Reference Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Checking-0456</td>
<td>Weekly</td>
<td>06/15/2019</td>
<td>2</td>
<td>1</td>
<td>$5.70</td>
<td></td>
</tr>
<tr>
<td>Checking-0456</td>
<td>Weekly</td>
<td>04/26/2019</td>
<td>3</td>
<td>0</td>
<td>$2.33</td>
<td></td>
</tr>
<tr>
<td>Checking-0456</td>
<td>Weekly</td>
<td>06/16/2019</td>
<td>-</td>
<td>-</td>
<td>$2.33</td>
<td></td>
</tr>
<tr>
<td>Checking-0456</td>
<td>Weekly</td>
<td>08/17/2019</td>
<td>7</td>
<td>0</td>
<td>$2.77</td>
<td></td>
</tr>
</tbody>
</table>

---

**Add Customer**

**Add Customer**

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Email</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sheldon</td>
<td>Cooper</td>
<td><a href="mailto:sheldon.cooper@bigfin.com">sheldon.cooper@bigfin.com</a></td>
<td>111-333-5555</td>
</tr>
</tbody>
</table>

---

**Manage Payments**

Return To List
Add a Payment Method

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

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

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.
# Add a Recurring Payment

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

### Frequency:

- **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.*
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.

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.

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.
Required Fields

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CardNumber</td>
<td>enter the full bankcard Number</td>
</tr>
<tr>
<td>ExpirationMonth</td>
<td>enter the two-digit expiration Month</td>
</tr>
<tr>
<td>ExpirationYear</td>
<td>enter the two-digit expiration Year</td>
</tr>
<tr>
<td>TransactionAmount</td>
<td>enter the amount of the transaction including cents (12.00)</td>
</tr>
</tbody>
</table>

Optional Fields

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

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

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.

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.

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.

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](#).
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** or **SEND INVOICE**

---

**Create New Invoice**

An electronic invoice can be sent to any customer with a valid email address or mobile phones. 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**: 202300001/01/024946
- **Merchant Email**: support@virtualterminal.com
- **Type**: 
- **Merchant Name**: Taco Queen
- **Merchant Address**: 123 Somewhere St
- **Merchant Phone**: 222-323-4444
- **Delivery Method**: Email Invoice
- **Recipient’s Email**: micha.linden@johndoe.com
- **Amount**: $125.00
- **Email Subject**: Invoice 202300001/01/024946 from Taco Queen

*indicates a required field.
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](image)

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.
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**

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.
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 no-reply@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](image-url)
**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.

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

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.

<table>
<thead>
<tr>
<th>OEM</th>
<th>Model</th>
<th>Part #</th>
<th>MSR</th>
<th>EMV</th>
<th>Encryption</th>
<th>Method</th>
<th>Website</th>
</tr>
</thead>
<tbody>
<tr>
<td>MAGTEK</td>
<td>Mini/wedge</td>
<td>21040108</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>USB</td>
<td>Brochure</td>
</tr>
<tr>
<td>MAGTEK</td>
<td>Dynamag</td>
<td>21073062</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>USB</td>
<td>Brochure</td>
</tr>
<tr>
<td>IDTECH</td>
<td>SREDKey XML KB</td>
<td>IDSK – 534833TXB</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>USB</td>
<td>Brochure</td>
</tr>
</tbody>
</table>

Encryption Key Part Numbers

<table>
<thead>
<tr>
<th>POS Portal</th>
<th>SREDKey Device Encryption</th>
<th>Part Numbers</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>90101900</td>
</tr>
<tr>
<td>POS Portal</td>
<td>SREDKey Device Encryption</td>
<td>6365533E (P2PE Validated) &amp; 63655346 (non-validated)</td>
</tr>
<tr>
<td>Phoenix Group</td>
<td>SREDKey Device Encryption</td>
<td>63655340 (P2PE Validated) &amp; 63655348 (non-validated)</td>
</tr>
</tbody>
</table>

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 OmniFlex payment 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.

<table>
<thead>
<tr>
<th>Menu</th>
<th>Card</th>
<th>Expiry</th>
<th>CVV</th>
<th>Street #</th>
<th>Zip</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Yes</td>
<td>Yes</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>2</td>
<td>Yes</td>
<td>Yes</td>
<td>-</td>
<td>-</td>
<td>Yes</td>
</tr>
<tr>
<td>3</td>
<td>Yes</td>
<td>Yes</td>
<td>-</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>4</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>-</td>
<td>Yes</td>
</tr>
<tr>
<td>5</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>6</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>
**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.

<table>
<thead>
<tr>
<th>Item Description:</th>
<th>IDT, Augusta, Encrypting, USB-HID, v4, Smart Card Reader, New</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>OEM</strong></td>
<td><strong>Model</strong></td>
</tr>
<tr>
<td>Augusta</td>
<td>IDEM-251P</td>
</tr>
<tr>
<td>Build Type</td>
<td>Production</td>
</tr>
<tr>
<td>Version</td>
<td>v4.0</td>
</tr>
<tr>
<td>Firmware</td>
<td>V1.02.007 or Higher</td>
</tr>
<tr>
<td>Software Load</td>
<td>“Validate-HPAugustaKB Certified Config. JSON”</td>
</tr>
<tr>
<td>Distributors</td>
<td>POS Portal</td>
</tr>
<tr>
<td>Processor</td>
<td>Worldpay (Vantiv)</td>
</tr>
<tr>
<td>Application</td>
<td>Augusta Express KB-Configuration</td>
</tr>
<tr>
<td>Device Encryption</td>
<td>KSI 63655346 (data variant) – POS Portal non-validated IDTech P2P key</td>
</tr>
<tr>
<td>Encrypted for:</td>
<td>Data – EPS IDTECH 48 TDES</td>
</tr>
</tbody>
</table>
**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.

<table>
<thead>
<tr>
<th>OEM</th>
<th>Model</th>
<th>Part #</th>
<th>MSR</th>
<th>EMV</th>
<th>Encryption</th>
<th>Method</th>
<th>Website</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ingenico</td>
<td>iPP320, triPOS Cloud Edition</td>
<td>iPP320-11P2391A IPP 320 PCI v3 + EMV + CTLS/NFC</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>IP</td>
<td><a href="#">Website</a></td>
</tr>
<tr>
<td>Ingenico</td>
<td>Power Supply</td>
<td>179901469</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ingenico</td>
<td>iPP320 Ethernet Cable</td>
<td>296114829AB</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ingenico</td>
<td>BASE RBA 21.0.2</td>
<td>PKRGEN04-210002B3</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ingenico</td>
<td>Data Package</td>
<td>DP-RVNT04-210202</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
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 4.0 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.

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.

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.
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.

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.

Free Shipping

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

Shipping Options

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

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

![Tax Options Table]

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.

![Product Variants Table]

To create, click on the New Variant button.

![New Variant Form]

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.

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 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.

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.
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”.

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 browsers address field or from the Product Catalog page you can click the Preview button.
Online Store

Creating an Order

From the online store consumers can select products for purchase.

<table>
<thead>
<tr>
<th>Menu Item</th>
<th>Description</th>
<th>Price</th>
<th>Select Options</th>
<th>Quantity</th>
<th>Add to Order</th>
</tr>
</thead>
<tbody>
<tr>
<td>T-Bone Steak</td>
<td>Grilled 16oz. T-Bone Steak</td>
<td>$22.95</td>
<td>Temperature: Select =</td>
<td></td>
<td>1</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Grilled Mushrooms:</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Grilled Onions:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Porterhouse Steak</td>
<td>Grilled 22oz Porterhouse Steak</td>
<td>$19.95</td>
<td>Temperature: Select =</td>
<td></td>
<td>1</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Grilled Mushrooms:</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Grilled Onions:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Baked Potato</td>
<td>Baked Potato</td>
<td>$5.95</td>
<td>Sour Cream: Select =</td>
<td></td>
<td>1</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Cheddar Cheese:</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Bacon:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grilled Pizza</td>
<td>10 Inch Grilled Pizza</td>
<td>$13.95</td>
<td>Peppers: Select =</td>
<td></td>
<td>1</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Mushrooms: Select =</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Extra Cheese:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>House Salad</td>
<td>House salad with tomatoes, cheese, cucumber, and</td>
<td>$3.95</td>
<td>Salad Dressings:</td>
<td></td>
<td>1</td>
</tr>
</tbody>
</table>

Items per page: 10
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.
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.

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.
Payment Information

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

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.

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 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**

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**.
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

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 Data**

<table>
<thead>
<tr>
<th>TaxYear</th>
<th>TaxMonth</th>
<th>TaxType</th>
<th>TaxLabel</th>
<th>TaxRateCharged</th>
<th>TaxableAmount</th>
<th>TaxCollected</th>
</tr>
</thead>
<tbody>
<tr>
<td>2020</td>
<td>10</td>
<td>Percent</td>
<td>Local</td>
<td>6.5</td>
<td>32.85</td>
<td>2.14</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
<td>Total 2.14</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>OmniFlex</th>
<th>Actions</th>
<th>Transaction Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transaction Type</td>
<td>Description</td>
<td>Capture</td>
</tr>
<tr>
<td>Credit</td>
<td></td>
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</tr>
<tr>
<td>Sale</td>
<td>Capture a transaction for settlement.</td>
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</tr>
<tr>
<td>Authorization</td>
<td>Authorization to hold funds on the card (capture for settlement later)</td>
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</tr>
<tr>
<td>Auth-complete</td>
<td>Capture prior authorization for settlement</td>
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<tr>
<td>Credit</td>
<td>swiped or keyed, requires full cc#, not tied to an original transaction</td>
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</tr>
<tr>
<td>Return</td>
<td>Refund a transaction up to 120 days from original authorization</td>
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<tr>
<td>Void</td>
<td>Cancel a same day transaction before settlement</td>
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<tr>
<td>AVS</td>
<td>Perform address verification on Billing Zip Code</td>
<td>*</td>
</tr>
<tr>
<td>Reversal</td>
<td>Release funds held on prior authorization</td>
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</tr>
<tr>
<td>Force</td>
<td>Requires prior voice authorization, approval code to force capture for settlement.</td>
<td>*</td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>Credit Card Transactions</th>
<th>VTPAppAdmin</th>
<th>Root</th>
<th>Boarding</th>
<th>Support</th>
<th>Account Owner</th>
<th>Account Administrator</th>
<th>Report Analyst</th>
<th>Cashier</th>
<th>Manager</th>
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<tbody>
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# OmniFlex

## Check Transactions

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<th>Process</th>
<th>VIPAdmin</th>
<th>Root</th>
<th>Boarding</th>
<th>Support</th>
<th>Account Owner</th>
<th>Account Administrator</th>
<th>Report Analyst</th>
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## Gift Transactions

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## Cash Transactions

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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](mailto: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!