Global Transport® VT

September 2015

Quick Reference Guide

Getting Started

Logging In

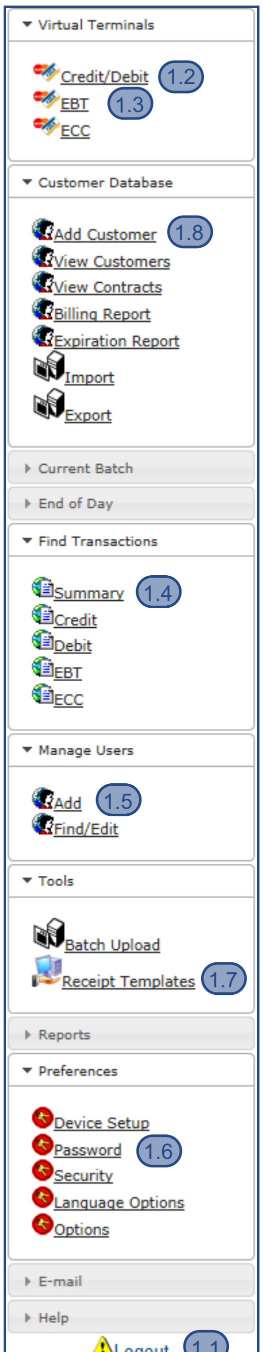
1. Enter the following URL into your web browser: **https://vt.globalpay.com**
2. The login screen displays.
3. Select the desired interface language.
4. Enter a Username and Password and click **Login**.
5. Upon logging in, the Main Menu (**fig. 1**) displays along the left side of the screen.

Logging Out

To log out, click **Logout** (**fig 1.1**) on the Main Menu.

To exit GT VT, log out and close the web browser.

Figure 1:



Credit/Debit/EBT Transactions

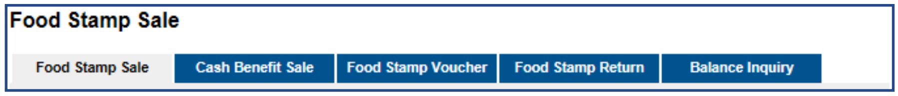
Access the Virtual Terminal

From the Main Menu, click to expand the **Virtual Terminals** menu and click **Credit/Debit** (**fig. 1.2**) or **EBT** (**fig. 1.3**). The Credit/Debit (**fig. 2**) or EBT (**fig. 3**) terminal screen displays:

Note: Support for contactless transactions will be available in a future release.

Figure 2:

Figure 3:



Sale

1. Select the Sale tab (**fig. 2**).
2. Enter the **Subtotal** and **Amounts**.
3. Click **Get Card Data**; customer follows instructions on PIN pad.
4. Complete the required fields.
5. Click **Process**; approval information displays.

Return

1. Select the Return tab (**fig. 2**).
2. Enter the **Subtotal** and **Tax Amount**.
3. Click **Get Card Data**; customer follows instructions on PIN pad.
4. Complete the required fields.
5. Click **Process**; approval information displays.

Force Authorization

1. Select the ForceAuth tab (**fig. 2**).
2. Enter the **Subtotal** and **Amounts**.
3. Click **Get Card Data**; customer follows instructions on PIN pad.
4. Complete the required fields.
5. Click **Process**; approval information displays.

Pre-Authorization

1. Select the PreAuth tab (**fig. 2**).
2. Enter the **Subtotal** and **Amounts**.
3. Click **Get Card Data**; customer follows instructions on PIN pad.
4. Complete the required fields.
5. Click **Process**; approval information displays.

Food Stamp Sale

1. Select the Food Stamp Sale tab (**fig. 3**).
2. Enter the **Subtotal**.
3. Click **Get Card Swipe**; customer follows instructions on PIN pad.
4. Complete the required fields.
5. Click **Process**; approval information displays.

Cash Benefit Sale

1. Select the Cash Benefit Sale tab (**fig. 3**).
2. Enter the **Subtotal**.
3. Click **Get Card Swipe**; customer follows instructions on PIN pad.
4. Complete the required fields.
5. Click **Process**; approval information displays.

Note: If enabled, a receipt prints automatically, or click **Print Receipt**. If email receipts are enabled, an email receipt is sent.

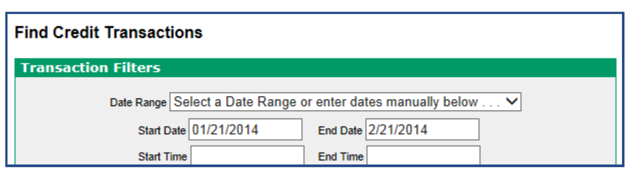
Find Transaction Functions

Finding Transactions

To perform a Void, Refund, Pre-Auth Complete, or Repeat Sale, first find the original transaction.

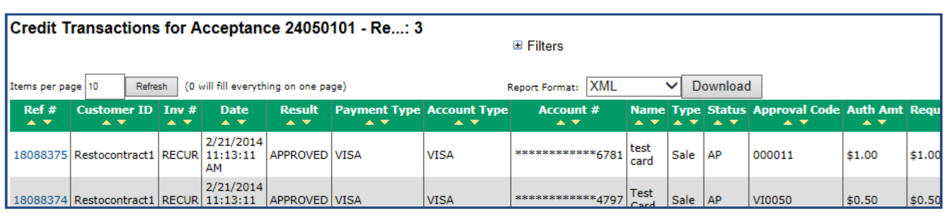
1. From the Main Menu, click to expand the **Find Transactions** menu and click **Credit** (**fig. 1.4**). The Transaction Filters screen (**fig. 4**) displays:

Figure 4:



2. Select a range from the **Date Range** list, enter a **Start Date/Time** and **End Date/Time**, or use the calendar to select a date.
3. Fill in the transaction information for the remaining filter fields. The less information you enter, the more matches are returned.
4. Click **Submit**. The search results (**fig. 5**) display:

Figure 5:

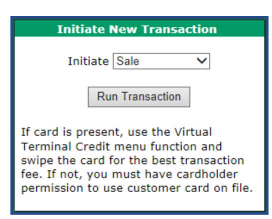


Ref #	Customer ID	Inv #	Date	Result	Payment Type	Account Type	Account #	Name	Type	Status	Approval Code	Auth Amt	Requ
18088375	Restocontract1	RECUR	2/21/2014 11:13:11 AM	APPROVED	VISA	VISA	************6781	test card	Sale	AP	000011	$1.00	$1.00
18088374	Restocontract1	RECUR	2/21/2014 11:13:11	APPROVED	VISA	VISA	************4797	Test Card	Sale	AP	VI0050	$0.50	$0.50

Performing a Follow-On Transaction

1. From the Find Credit Transactions results window (**fig. 5**), click on the **Ref #** (PNRef) of the desired transaction.
2. The transaction information displays. In the **Initiated New Transaction** (**fig. 6**) dropdown, select the transaction type to perform.
3. Click **Run Transaction**.
4. The transaction page displays. Complete the required fields.
5. Click **Process**; approval information displays.

Figure 6:

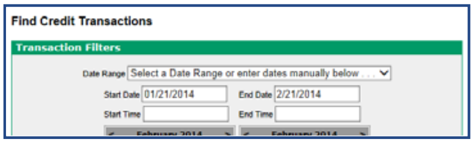


Reporting

Summary Report

1. From the Main Menu, click to expand the **Find Transactions** menu and click **Summary** (**fig. 1.4**). The Transaction Summary Filters window (**fig. 7**) displays:

Figure 7:



2. Select a range from the **Date Range** list, enter a **Start Date** and **End Date**, or use the calendar to select a particular date. Select the **User** who entered the transaction, the Global Payments **Batch Num**, or the **Register**. Choose to present data by transaction type or card type.
3. Click **Submit**. The search results display (**fig. 8**, data ordered by CardType):

Figure 8:

Credit Card Summary Present Transaction Detail

Card Type	Trans Type	Trans Count	Auth Amount	Tip Amount	Capture
Amex	Force Capture	2	$2.65	$0.00	
Amex	Authorization	5	$263.85	$0.00	
Amex	Preauth Complete	1	$0.00	$0.00	
Amex	Sale	5	$8.77	$0.00	
Discover	Card Verify	3	$4.25	$0.00	
Discover	Force Capture	4	$5.63	$0.00	
Discover	Authorization	3	$4.23	$0.00	
Discover	Preauth Complete	2	$0.00	$0.00	
Discover	Sale	10	$35.90	$7.00	
MasterCard	Balance Inquiry	1	$0.00	$0.00	
MasterCard	Card Verify	2	$0.00	$0.00	

4. To print the report, use your browser's print button or click **File-Print** in the browser.

Detail Report

To view the detail report for a summary report, click the **Present Transaction Detail** link at the top of the summary report.

To generate a detail report from a new query:

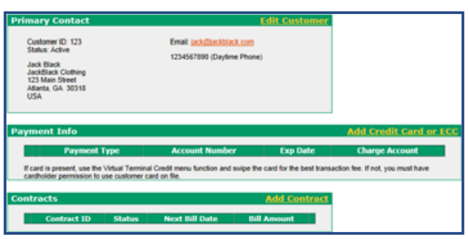
1. Follow steps 1-4 of the "Finding Transactions" section on the previous page. The results of the search display (**fig. 5**).
2. To view more than ten transactions per page, change the value in the **Items per page** field (top-left) accordingly. To view all of the transactions on one page, type zero (0). Click **Refresh**.
3. To print the report, use your browser's print button or click **File - Print** in the browser.
4. For additional information about individual transactions, click on the **Ref #** field (PNRef).

Customer Database

Adding Customers

1. From the Main Menu, click to expand the **Customer Database** menu and click **Add Customer** (**fig. 1.8**). The Add Customer window displays.
2. Enter the customer's information into the **Primary Contact Info** and **Billing Address** fields.
3. Click **Add Customer**. The Primary Contact window (**fig. 9**) displays:

Figure 9:



Administration

Adding New Users

1. From the Main Menu, click to expand the **Manage Users** menu and click **Add** (**fig. 1.5**); the User Information window (**fig. 10**) displays:

Figure 10:

2. Enter the user's information into the fields.
3. Click **Save User**; the system displays a message indicating the creation of a new user account.

Changing Password

1. From the Main Menu, click to expand the **Preferences** menu and click **Password** (**fig. 1.6**).
2. Enter your **Current Password**, **New Password**, and then **Verify New Password**.
3. Click **Change Password**.

Configuring Receipts

1. From the Main Menu, click to expand the **Tools** menu and click **Receipt Templates** (**fig. 1.7**); the Receipt Template window (**fig. 11**) displays:

Figure 11:

2. Click the **Footer** tab. Enter the message to be printed in the footer lines at the bottom of each receipt.
3. **Required**. Click the **Refund Policy** tab. Enter the merchant's refund policy. This message appears on physical receipts and email receipts (when enabled).
4. Click **Save**.

Customer Database

Adding Credit Card Payment Information

1. From the customer's Primary Contact window (**fig. 9**), click **Add Credit Card or ECC**.
2. The Payment Item window displays; select **Credit Card**.
3. The credit card information fields appear; enter the credit card information or swipe the credit card. To quickly enter the customer's name and address, click **Copy Details From Customer Record**. Fields with an asterisk (*) are required.
4. To use the payment information at a later time, click **Save Payment Info**.
5. To charge the customer now, select **Charge Now**.
6. If you selected **Charge Now**, enter the amount of the charge and click **Charge & Save Payment Info**.
7. If you selected **Charge Now**, approval information displays. If enabled, a receipt prints automatically, or click **Print Receipt**.

Adding Contract Information

1. From the customer's Primary Contact window (**fig. 9**), click **Add Contract**.
2. The Add Contract window displays; enter the customer's contract information.
3. Click **Add Contract**. The Primary Contact window (**fig. 9**) displays with updated contract information.

Device Setup

Devices

VeriFone VX 805 PIN Pad: supports magnetic stripe read, EMV contact and contactless (in a future release) entry, and PIN entry for debit and EBT transactions. Do not use with the VeriFone 1000SE PIN Pad or MagTek Mini Swipe Card Reader.

VeriFone 1000SE PIN Pad: supports magnetic stripe read and PIN entry for debit and EBT transactions.

MagTek Mini Swipe Card Reader: supports magnetic stripe read.

MagTek MiniMICR Check Reader: supports check scanning.

Epson TM-T88V, TM-T20, and TM-U220 Receipt Printers: supports receipt printing.

VeriFone VX 805 PIN Pad Setup

1. From the Main Menu, click to expand the **Preferences** menu and click **Device Setup** then **Multifunctional Devices**.
2. Click **Download Client Service**. Install the Client Service with administrator privileges. Requires Microsoft .NET Framework v.4.5.1.
3. Navigate to **C:\Program Files\Global Transport** or **C:\Program Files (x86)\Global Transport**.
4. Unzip **VeriFoneUSBUARTDriver_Vx_1.0.0.61_B2.zip**.
5. Unzip **Vx_1.0.0.61_B2.zip**.
6. Run **silent.bat** to install drivers.
7. Plug the PIN pad's USB cable into the PC.
8. From the Main Menu, click to expand the **Preferences** menu and click **Device Setup** then **Multifunctional Devices**.
9. Select Device Type **Verifone Vx805** and Com Port **9**.
10. Click **Save**.

VeriFone 1000SE PIN Pad Setup

1. Connect the power cable, serial cable, and PIN pad.
2. Plug the power cable into an electrical outlet.
3. Plug the serial cable into the PC. If necessary, use a USB-to-serial adapter.
4. In Internet Explorer, add **https://vt.globalpay.com** as a trusted site and allow the installation of ActiveX controls.
5. Navigate to **https://vt.globalpay.com**, login, and install the ActiveX control.
6. From the Main Menu, click to expand the **Preferences** menu and click **Device Setup**.
7. Select Pinpad Type **Verifone 1000**.
8. Select Com Port **1** if not using USB-to-serial adapter. Otherwise, select Com Port found next to Windows Device Manager, Ports, USB-to-serial Comm Port.
9. Click **Save**.

MagTek Mini Swipe Card Reader Setup

1. Plug the card reader into a USB or keyboard port on the PC.

MagTek MiniMICR Check Reader Setup

1. Plug the check reader into a USB or keyboard port on the PC.
2. From the Main Menu, click to expand the **Preferences** menu and click **Device Setup** then **Check Reader**.
3. Select Check Reader Type **Magtek Mini MICR**.
4. Click **Save**.

Epson Receipt Printer Setup

1. From the Main Menu, click to expand the **Help** menu and click **Help**. Click **Epson Printer Driver (ZIP)**.
2. Unzip **Epson_Printer_Driver.zip** and then run **APD_415E.exe** to install the printer drivers.
3. Connect the power cable, serial/USB cable, and printer.
4. Plug the power cable into an electrical outlet and the serial/USB cable into the PC.
5. From the Windows Start menu, select **Devices and Printers**. Right-click the Epson printer and select **Properties**. Click the **Advanced** tab then click **Printing Defaults**. Click the **Document Settings** tab. Set Paper Source to **Page[Feed,Cut]**.
6. Perform steps 4-5 of VeriFone 1000 SE PIN Pad Setup.
7. From the Main Menu, click to expand the **Preferences** menu and click **Device Setup** then **Printer**.
8. Select the **Printer** type and then your desired options.
9. Click **Save**.