

First Data Global GatewaySM **Virtual Terminal[®] User Manual**

Version 1.0

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1 Introduction

The First Data Global GatewaySM Virtual Terminal is used to process monetary transactions. It provides one location where you can manage everything related to transaction processing.

With the First Data Global Gateway Virtual Terminal you can:

- Run secure transactions.
- Prevent fraud.
- Review transaction reports.
- Find technical support.

1.1 First Data Global Gateway Virtual Terminal Overview

1.1.1 Processing Transactions

With the First Data Global Gateway Virtual Terminal, you can process transactions using a Virtual Point of Sale (POS) Terminal. All you need to do is enter data needed for the transaction. You can even customize the terminal fields.

You can log in to the First Data Global Gateway Virtual Terminal and process orders from anywhere you have Internet access.

1.1.2 Managing Your Account

With the First Data Global Gateway Virtual Terminal, you can manage everything from one location.



From the **Main Menu Bar** shown above, utilize tools to help you manage your account.

Reports	View your transaction reports to update yourself on the success of your store. Reports include charts and graphs helpful for business visualization and presentations.
Support	Perform support-related activity, such as: <ul style="list-style-type: none">• Viewing support manuals for First Data Global Gateway products.• Viewing Frequently Asked Questions (FAQs) and information about contacting Support.• Contacting support through an online support form.• Downloading files.

Admin	<p>Process administrative activity, such as:</p> <ul style="list-style-type: none"> • Setting your fraud protection settings. • Changing your password. • Adding or deleting users. • Configuring your Multi-Store reporting. • Entering items into your product catalog. • Customizing receipts. • Customizing your payment page settings for First Data Global Gateway Connect . • Customizing your Virtual Terminal content.
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1.1.3 Managing Multiple Stores

When you have multiple accounts with different store numbers, you can view consolidated reports by setting up a multi-store reporting structure. You must set up a separate multi-store administrative account with a separate login. Contact support at 1-800-625-171 to get your initial multi-store admin login ID and password.

1.2 Browser Compatibility

The following Internet browsers are compatible with the First Data Global Gateway Virtual Terminal :

- Microsoft® Internet Explorer® V6.0 or higher
- Firefox V2.0 or higher

Enable JavaScript and cookies to use the First Data Global Gateway Virtual Terminal.

Set your screen resolution to 800 by 600 pixels or higher.

1.3 Navigating the First Data Global Gateway Virtual Terminal

The First Data Global Gateway Virtual Terminal uses two primary navigation tools: the **Main Menu Bar** and the **Side Menu Bar**.

The application is divided into sections, each with its own set of pages. After you have logged in, the main page of the Virtual Terminal section opens.

There are three ways to reach a specific page in a section:

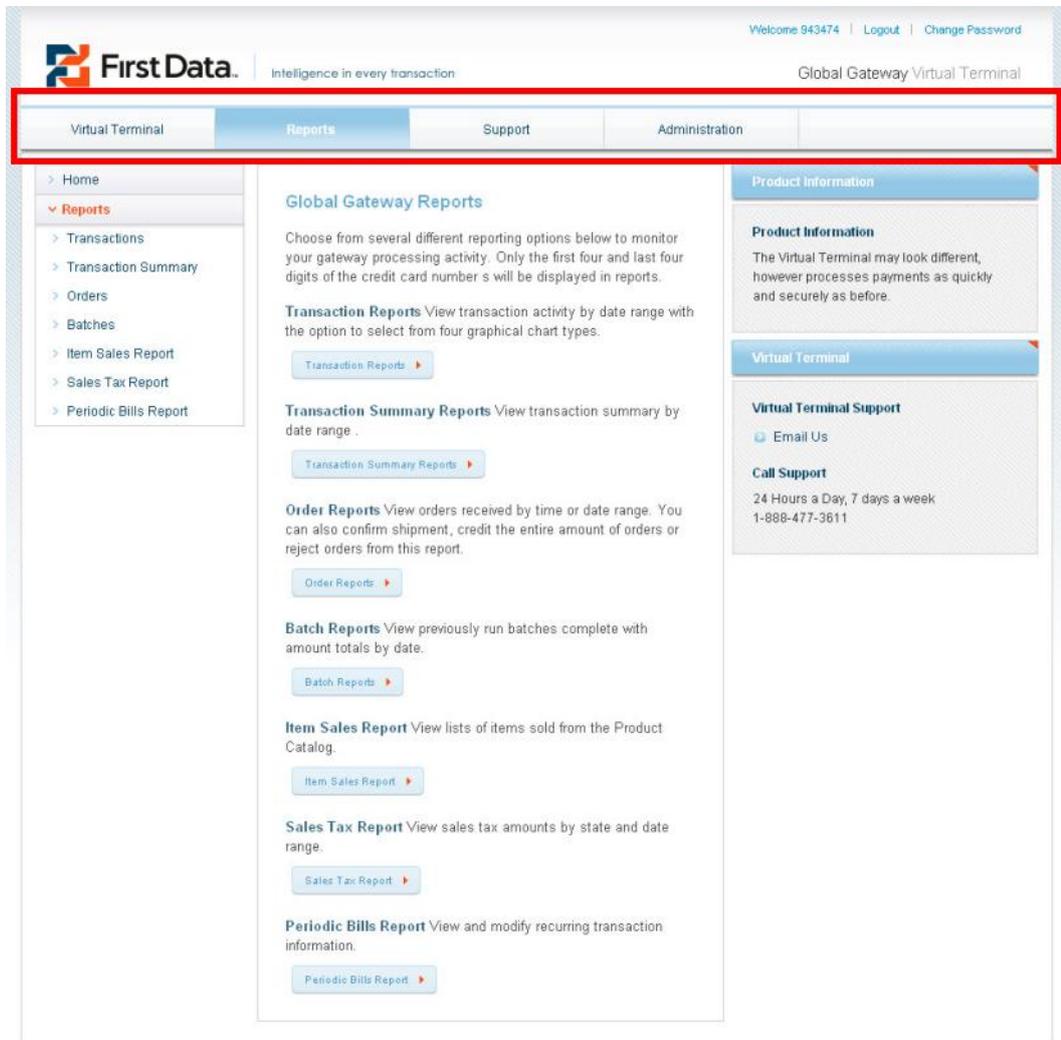
- Hold your mouse over the section's name on the **Main Menu Bar** and click a page name on the popup menu. This method is accessible from anywhere in the application.
- Click a section's name item on the **Main Menu Bar** to reach the section's main page, and then click a link on that page. Some main pages do not have links to other pages in the section.
- To reach another page in the current section, click the page's name on the **Side Menu Bar**.

The following sections give more details on navigating the First Data Global Gateway Virtual Terminal.

1.3.1 Main Menu Bar

The **Main Menu Bar** is typically located near the top left of the application. It contains links to the main sections of the First Data Global Gateway Virtual Terminal. This menu bar is always present in the application. Click on a link in the **Main Menu Bar** to go to the corresponding section. Hold your mouse over any menu bar item to see a popup menu of links to specific pages in that section. The links on the **Main Menu Bar** are:

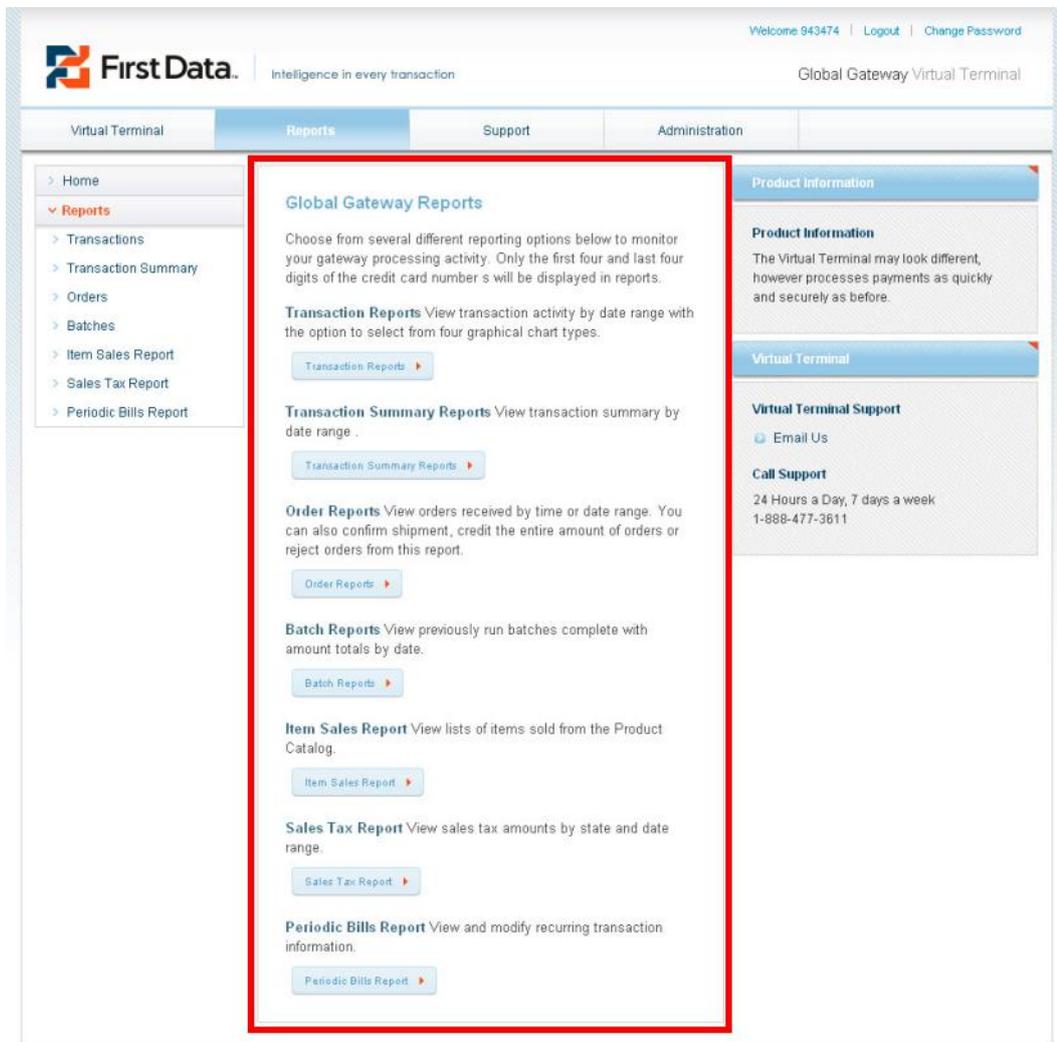
- Virtual Terminal
- Reports
- Support
- Administration



The First Data Global Gateway Virtual Terminal **Main Menu Bar** is shown above in the red box.

1.3.2 Main Page Content

Some sections have a main page that contains links to each page in that section. You can reach a section's main page by clicking that section's link in the **Main Menu Bar**.



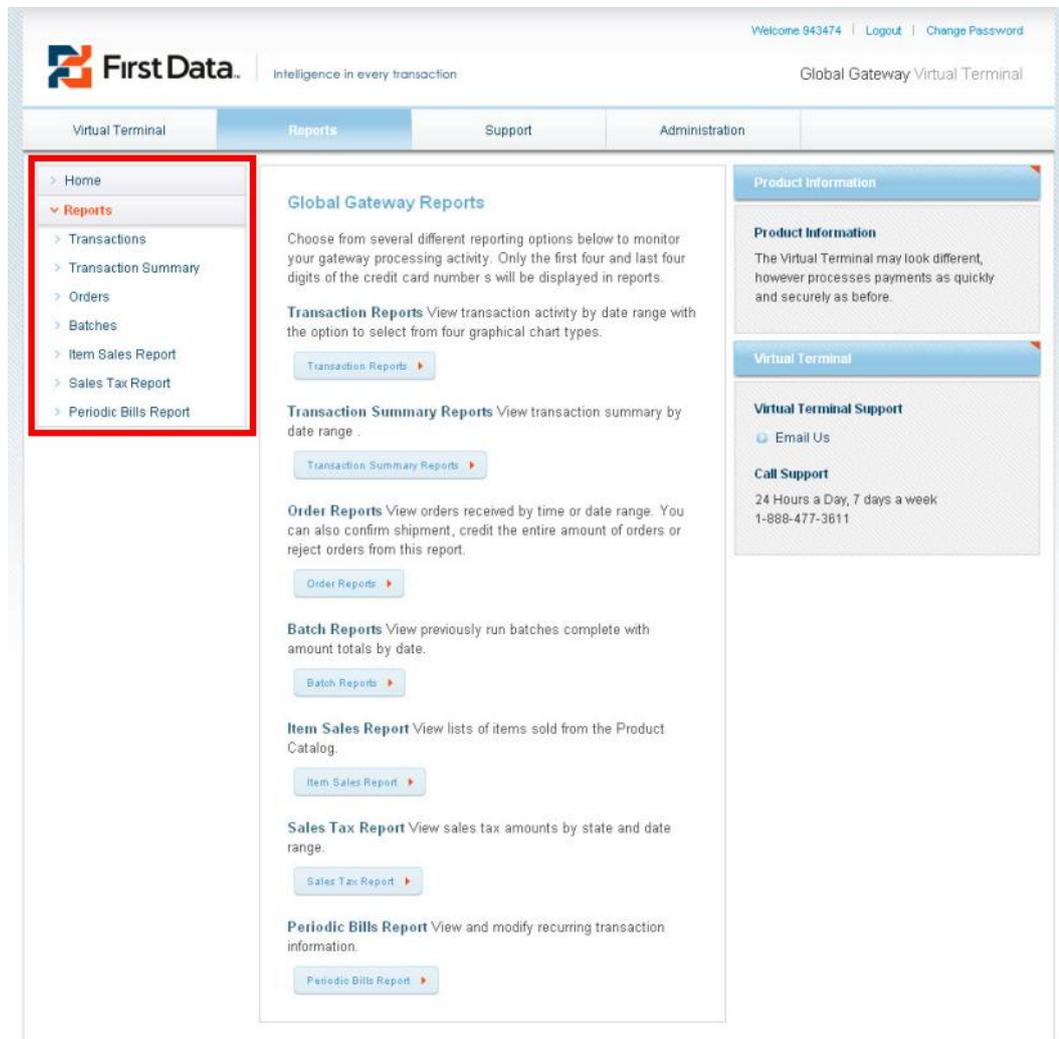
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The main page content for the Reports section is shown above in the red box.

Note: The main Virtual Terminal page shows a transaction processing page instead of links to other Virtual Terminal pages.

1.3.3 Side Menu Bar

The **Side Menu Bar** is typically located on the left side of the screen. It contains menu items relevant to the current section selected in the **Main Menu Bar**. The items in this menu correspond to the topics on the popup menu that appears when you mouse over that section's **Main Menu Bar** link.



The **Side Menu Bar** is shown above in the red box. The **Side Menu Bar** does not appear on the main Virtual Terminal page.

The name of the current section appears highlighted in the **Side Menu Bar**. Click the section name to view the main page of the section. Click the other links in the **Side Menu Bar** to view pages within the section.

Note: You can also usually navigate within a section by clicking on links from the main page of that section. The example above shows the main page of the Reports section.

1.3.4 Information Menus

Some pages display a set of informational menus on the right side of the page.

The screenshot shows the First Data Global Gateway Virtual Terminal interface. The page is divided into three main sections: Order Information, Credit Card Information, and Customer Information. On the right side, there is a vertical sidebar containing three informational menus: Product Information, Virtual Terminal Support, and Other Info. These menus are highlighted with a red border. The Product Information menu contains a message about payment processing. The Virtual Terminal Support menu lists links for Frequently Asked Questions, Virtual Terminal Manual, and Email Us. The Other Info menu contains a password change reminder and a Change Password link. The main form area includes fields for Order number, Purchase Order number, Invoice Number, Subtotal, Shipping Amount, Tax, VAT, Total Amount, Transaction Origin, Transaction type, Cards Accepted, Credit Card Number, Expiration Date, Credit Card Code, and Customer Information fields like Customer ID Number, Customer name, Billing company, Billing street address, and City.

The **Information Menus** are shown above in the red box. These menus are not present on all pages.

The menus are:

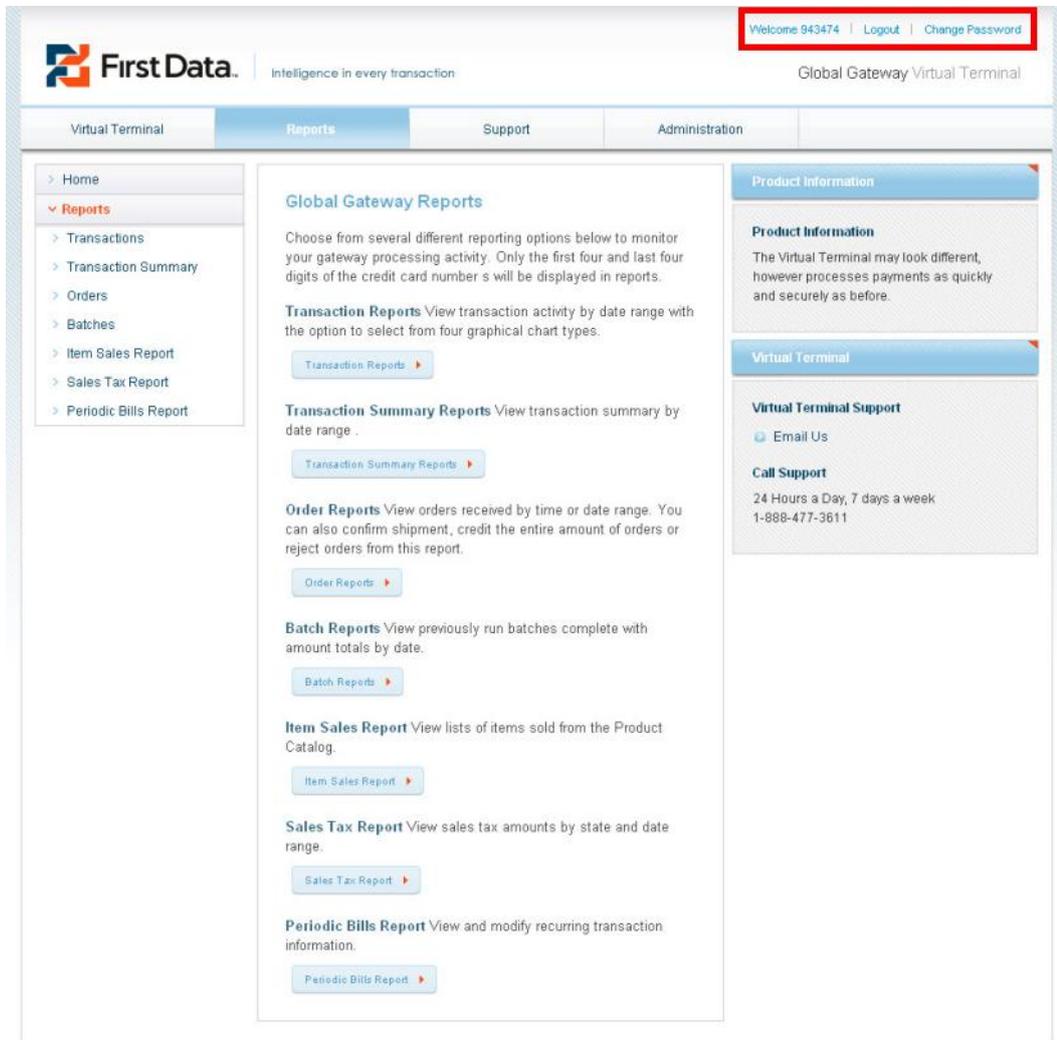
- **Product Information** - General information about the First Data Global Gateway Virtual Terminal.
- **Virtual Terminal** - links and information about getting help with the application.
- **Other Info** - recent important information, such as product tips, maintenance issues, and fraud alerts.

Click a **Find out more** link in one of the Information Menus to get more details on that menu.

1.3.5 Shortcut Links

The links in the upper right corner provide more shortcuts. They are:

- **Logout** - log yourself out.
- **Change Password** - change your password.



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The shortcut links are shown above in the red boxes. These links are present on every page.

1.4 Logging In

In order to use the First Data Global Gateway Virtual Terminal, you need to log in.

1. Type the following URL into your Internet browser:
<http://www.firstdata.com/ecommerce>

The Login page appears.

Global Gateway Virtual Terminal

First Data. Intelligence in every transaction

Welcome to the First Data Global Gateway

The Global Gateway Virtual Terminal is an online payment application that allows you to accept credit cards and other payment types using your PC. The Virtual Terminal also acts as your Global Gateway account management application and allows you to view gateway processing reports, edit fraud settings, manage users, and more.

Account Login

Store Number

User ID

If Store Number & User ID are the same - leave User ID blank

Password

[Administrator Login](#)

Virtual Terminal

Virtual Terminal Support

- [Frequently Asked Questions](#)
- [Virtual Terminal Manual](#)
- [Email Us](#)

Call Support

24 Hours a Day, 7 days a week
1-888-477-3611

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2. Enter the 10-digit store number in the **Store Number** field.
3. Leave the **User ID** field blank.
4. Enter your password in the **Password** field.
5. Click the **Login** button.

Note: You should have received a Welcome Email from 'virtual.pos@firstdata.com.au'. This email contains the following items required to log in:

- A store name that is generally a 6-10 digit numeric value.
- A user-id that should be the last 6 digits of a 10 digit store number

Please call support at 1800 625 171 to receive your temporary password.

If this is the first time you are logging in to the First Data Global Gateway Virtual Terminal, you will be asked to accept the Global Gateway User Agreement. Click **Accept Agreement** on the Global Gateway User Agreement.

After you log in, you are ready to begin using the First Data Global Gateway Virtual Terminal.

1.5 Logging Out

To protect your account, it is important to log out of the First Data Global Gateway Virtual Terminal. Click the **Logout** link at the top of the page when you are finished using the application.



The First Data Global Gateway Virtual Terminal will log you out automatically after 10 minutes of inactivity.

2 Virtual Terminal

In the First Data Global Gateway Virtual Terminal, you can enter transactions from the Virtual Terminal section. Click **Virtual Terminal** on the **Main Menu Bar** to access the Virtual Terminal page. This page is used for all your Sale, Authorize Only, and Forced Ticket transactions. There is no **Side Menu Bar** on this page.

For Ticket Only, Return, and Credit transactions, mouse over Virtual Terminal and click the respective link on the popup menu. You can also click the respective link on the **Side Menu Bar** when it is present.

Note: Ticket Only, Return, and Credit transactions use the database and therefore have separate pages. You may not have access to Credit transactions.

2.0.1 Knowing the Virtual Terminal Section

All required fields in this section are bold and marked with an asterisk.

Anytime you attempt a transaction with errors,  appears next to the field containing errors.

Anywhere you see  next to a field, hold your mouse over the icon to learn more about the field.

2.0.2 Transactions

From the Virtual Terminal section you can perform:

- Credit card transactions
- Ticket only transactions
- Return transactions
- Credit transactions

2.1 Credit Card Transactions

From the Virtual Terminal page, you can process credit card Sale, Authorize Only, and Forced Ticket transactions. The Virtual Terminal page is the first page to open after you log in. To reach this page any time, click **Virtual Terminal** on the **Main Menu Bar**.

The Virtual Terminal page has no **Side Menu Bar**. For Ticket Only, Return, and Credit transactions, mouse over Virtual Terminal on the **Main Menu Bar** and click the respective link on the popup menu.

Note: You may not have access to Credit transactions.

The following sections are available when making credit card transactions on the **Credit Card** tab. You must complete all required fields in the sections to make a credit card transaction.

- Select Products from Catalog

- Order Information
- Credit Card Information
- Customer Information
- Shipping Information
- Recurring Payment
- Comments

2.1.1 Continue or Clear Form

After you have completed all the required fields for performing the transaction correctly, click the **CONTINUE >>** button on the Virtual Terminal page.

Click the **CLEAR FORM** button to erase all information you have entered and begin again.

When you click the **CONTINUE >>** button, any missing or incorrect information appears on the Virtual Terminal page with an error message. Make the appropriate corrections to the fields marked with a ; then click the **CONTINUE >>** button again.

If there are no invalid entries, the Confirmation page appears. Review the information and, if necessary, click the **Return to POS** button to make any corrections. Otherwise, click the **SUBMIT** button.

The Transaction Result page appears after you click the **SUBMIT** button on the Confirmation page. The Transaction Result page contains all the information you entered and the Transaction Information section. For more information about the Transaction Result page, see "Transaction Results" on page 22.

2.1.2 Printing a Receipt

When you need a receipt for the customer to sign, you can print a receipt. Click the **Show Receipt** button at the bottom of the Transaction Result page. The receipt window opens with the transaction receipt. Click the **Print Receipt** button at the bottom of the receipt window to print the receipt.

Receipt Window

DEMO STORE
123 DEMO ST.
DEMO, CA 93001
Tel: 8885551212
Store #1001158219
08/29/07 11:25:58 AM
eCommerce Sale
GREFPAC

Billing Address

Bob Jones
1114 Lyle Pl
Atlanta, GA 30318

CARD NUMBER: Visa1111 SWIPE: No
STATUS: **APPROVED - 123456**
ORDER Number: 172.30.184.97-114B2718053-65D163-277FCC

#	Qty	ID	Description	Options	Unit Cost	Filename	Extended Cost
1	1	000001	GREFPAC Member Dues		50.00	member_dues.html	50.00

SUBTOTAL: \$50.00
TOTAL: \$50.00

I AGREE TO PAY ABOVE AMOUNT ACCORDING TO CARD ISSUER.

SIGNATURE X _____
Bob Jones

Thank you!

Example of the receipt after you click the **Show Receipt** button on the Transaction Results page.

When you have printed all the receipts you need, close the receipt window by clicking on the **Close Window** button at the bottom of the receipt window.

2.1.3 Order Information

From the Virtual Terminal page, use the Order Information section to enter any information related to the order, such as the total amount or order number.

The First Data Global Gateway Virtual Terminal displays the following fields in the Order Information section. You must enter all required fields to complete the transaction.

Order Number

This field is the number assigned to the order. Enter a number in this field to manually assign a number to the transaction. Each order number must be unique, so it is best to have a system for generating order numbers. The First Data Global Gateway Virtual Terminal automatically generates an order number when you do not enter a number in this field.

Purchase Order number

Enter a purchase order number in this field when there is a purchase order number to assign to the transaction. You can use the same purchase order number for multiple transactions.

Invoice Number

This field is the number assigned to the invoice. Enter a number in this field to manually assign a number to the transaction for invoicing purposes.

Subtotal

The subtotal is the amount of the purchase before Tax, VAT (if applicable), and Shipping Charges. If you chose any products from the Product Catalog, the subtotal is automatically calculated when you click the **Update Subtotal** button.

Shipping Amount

This field is the shipping charge you want to assign to the order. Enter the amount to charge for shipping the order in this field.

Tax

This field is the sales tax assigned to the order. Enter the amount of tax to apply to the order. If you have the tax percentage feature enabled, enter the tax percentage to apply to the order. If the order is tax exempt and the **Tax Exempt** checkbox is present, select the checkbox.

See "Customizing Virtual Terminal Content" on page 56 to set up the tax percentage calculation.

VAT (for international orders)

This field is the Value Added Tax (VAT) assigned to international orders. In some cases, you may not need to charge the VAT. The First Data Global Gateway Virtual Terminal explains more about the field when you roll over the question mark icon with your mouse.

Total Amount

The Total field displays the sum of the Tax, VAT (if applicable), Shipping charges, and Subtotal.

2.1.4 Credit Card Information

The First Data Global Gateway Virtual Terminal displays the following fields in the **Credit Card Information** section of the Virtual Terminal page needed to complete a credit card Sale, Authorize Only, or Forced Ticket transaction. You must enter all required fields to complete the transaction.

Transaction Origin

The Transaction Origin is how the order was received. Choices are:

- Mail Order/Telephone Order - you received the order over the phone or through the mail.
- Retail (face to face) - the customer and card are present.
- Electronic Commerce (internet) - you received the order through the Internet or email.

Transaction type

Select the type of transaction you are going to make. Choices are:

- Sale - charges the customer's card immediately when the batch is settled.
- Authorize Only - reserves funds on the customer's card, but does not complete the transaction.
- Forced Ticket - completes a voice authorization transaction.

The default for this field is Sale.

Cards Accepted

The supported card types are credit card types the merchant accepts. An image for each supported card is shown. The First Data Global Gateway Virtual Terminal automatically detects the card type based on the account number.



Credit Card Number

When the card is not present, this field is used to enter the credit card number. Do not enter any dashes or spaces in this field.

Expiration Date

This field is the expiration date of the credit card. Select the appropriate dates from the dropdown lists. The first list is the month, and the second is the year.

month **year**

*Expiration Date

Credit Card Code

The card code is a 3 or 4-digit number usually found on the back of the customer's credit card, on the same line as the signature. For American Express cards, this number is located on the front of the card.

This field is optional; however, it provides additional security which is advantageous.



The First Data Global Gateway Virtual Terminal explains more about the field when you roll over the question mark icon with your mouse.

Reference Number (for Forced Ticket)

For Forced Ticket transactions only - enter the reference number associated with the transaction in the Reference Number box. The **Reference Number** field will not appear unless you have chosen Forced Ticket as the transaction type. The reference number is typically given over the phone with the authorization.

2.1.5 Customer Information

Use the Customer Information section on the Point of Sale page to enter any contact information for the customer, such as the customer's ID number, name, and address.

The First Data Global Gateway Virtual Terminal displays the following fields in the Customer Information section. You must enter information in all required fields to complete the transaction.

Customer ID Number

The customer ID number is a unique identification number for the customer.

Customer name

Enter the customer's full name in this field.

This field is required for Internet, mail, and telephone order credit card transactions. For retail credit card transactions, it is not required.

This field is required for Internet and telephone order check transactions. For mail order and retail order check transactions, it is not required.

Billing company

Enter the customer's company name in this field. This field can contain alphanumeric characters only.

Billing street address

Enter the customer's billing address in this field. There are two lines provided. The second line is always optional.

This field is required for Internet, mail, and telephone order credit card transactions. For retail credit card transactions, it is not required.

This field is required for Internet and telephone order check transactions. For mail order and retail order check transactions, it is not required.

City

Enter the customer's city, town, or township name in this field.

This field is required for Internet, mail, and telephone order credit card transactions. For retail credit card transactions, it is not required.

This field is required for Internet and telephone order check transactions. For mail order and retail order check transactions, it is not required.

State or Province

For United States addresses, this field is the customer's state.

For an international address, this field is the customer's province.

When you enter a province or select any country other than the United States, the **State** field will be blank

This field is required for Internet, mail, and telephone order credit card transactions. For retail credit card transactions, it is not required.

This field is required for Internet and telephone order check transactions. For mail order and retail order check transactions, it is not required.

Country

Enter the customer's country in this field. United States is the default country. If you do not see the country in the dropdown list, select **Other - Not Shown**.

If you select any country other than United States, the **State** field will be blank.

This field is required for Internet, mail, and telephone transactions. For retail transactions, it is not required.

Zip/Postal Code

For United States addresses, enter the 5-digit zip code in this field.

For international addresses, enter the appropriate international postal code in this field.

This field is required for Internet, mail, and telephone order credit card transactions. For retail credit card transactions, it is not required.

This field is required for Internet and telephone order check transactions. For mail order and retail order check transactions, it is not required.

Phone

Enter the customer's phone number in this field. Brackets (), dashes - , and spaces are optional.

This field is required for check transactions only.

Fax

Enter the customer's fax number in this field. Brackets (), dashes - , and spaces are optional.

Email

Enter the customer's email address in standard email format, such as name@server.com, name@server.net, name@server.org, or name@university.edu.

This field is used to send the customer's receipt by email. Email transactions cannot be blocked if you do not enter the email address.

2.1.6 Shipping Information

From the Virtual Terminal page, use the Shipping Information section to enter information about where the order will be sent, if applicable.

The First Data Global Gateway Virtual Terminal displays the following fields in the Shipping Information section. You must enter information in all required fields to complete the transaction.

Same as Billing

If the shipping address is the same as the billing address, selecting this checkbox will cause the corresponding fields from the billing information to be copied into the shipping section.

If the shipping address is different than the billing address, do not check this checkbox.

Shipping Type

Enter the type of shipping you will use for the order. Up to 36 alphanumeric characters are allowed in this field. Examples are Federal Express, US Postal Service, and UPS Ground.

Ship to this person

Enter the person's full name where the order will be shipped in this field.

Shipping street address

Enter the shipping street address in this field. There are two lines provided.

City

Enter the city, town, or township name where you will ship the order.

State or Province

For United States addresses, enter the customer's state where you will ship the order.

For an international address, enter the customer's province where you will ship the order.

When you enter a province or select any country other than the United States, the **State** field will be blank

Country

Enter the customer's country in this field. United States is the default country. If you do not see the country in the dropdown list, select **Other - Not Shown**.

If you select any country other than United States, the **State** field will be blank.

Zip/Postal Code

For United States addresses, enter the 5-digit zip code in this field.

For international addresses, enter the appropriate international postal code in this field.

2.1.7 Comments

From the Virtual Terminal page, use the Comments section to enter optional notes about the transaction.

Comments are visible in your reports to help you with your transaction management if you use them effectively. In the **Comments** field, enter any comments you may have about the order.

2.1.8 Transaction Results

Use the Transaction Information section on the Confirmation page to view whether the transaction was approved or declined.

If the transaction was approved, the Transaction Status is **Approved**, followed by:

- The date and time of the transaction.
- The transaction origin.
- The transaction type.
- Approval code.

The Approval code will contain a 3-digit AVS code (See "AVS Codes" on page **Error! Bookmark not defined.**) indicating whether the card-issuing bank's address on file matched the address entered for the transaction.

The First Data Global Gateway Virtual Terminal displays the following fields in the Transaction Information section.

Transaction Status

This field displays the status of the transaction, such as Approved, Declined, or Blocked because of fraud.

Transaction Date & Time

This field displays the date and time of the transaction. This is helpful for finding the transaction in reports. The date will be in the format: dd/mm/yy hour:minute:second AM/PM (PST).

Transaction reference number

This field displays the reference number for the transaction which is used for identifying an authorization when a sale is completed.

Transaction Type

This field displays the type of transaction you made. Transaction types displayed are:

- Sale - charges the customer's card immediately when the batch is settled.
- Authorize Only - reserves funds on the customer's card, but does not complete the transaction.
- Forced Ticket - completes a voice authorization transaction.

Approval Code

The approval code is a string of numbers and letters. An example of an approval code is:

0097820000019564:YNAM:12345678901234567890123.

The first 6 digits of the line above (009782) are the **Approval number**.

The next 10 digits (0000019564) are the **Reference number**.

The first three alphabetic characters in the middle (YNA) are the **AVS Code**.

The last alphabetic character in the middle (M) is a code indicating whether the card code matched the card-issuing bank's code. This code may or may not be present depending on whether the card code was passed and the service was available for the type of card used. For Visa cards, these codes are:

- M - CVV2 Match
- N - CVV2 does not match
- P - Not processed
- S - Merchant has indicated that CVV2 is not present on the card
- U - Issuer is not certified and/or has not provided Visa encryption keys

The remaining portion of the approval code (12345678901234567890123) is the **Leaseline transaction identifier**. Not all transactions have an associated leaseline transaction identifier.

If the transaction was **Declined** for any reason, ask for another card, and refer customers to their bank or credit card company.

2.1.9 Card Codes

The card code is a 3 or 4- digit security code. For Visa, MasterCard, and Discover the number typically appears at the end of the signature panel. For American Express, the number appears on the front of the card. This security card program helps validate that

a genuine card is being used during a transaction. A card code mismatch blocks the transaction.



The card code is circled.

Mail order, telephone order (MO/TO), and other transactions when the card is not present have higher fraud rates than face-to-face transactions. To help reduce fraud, use the card code.

You should always enter a card code (if on the card) when processing an authorization for (MO/TO) and e-commerce transactions.

For retail transactions, you may want to enter the card code printed on the card to ensure that the card was not fraudulently reproduced.

By using the card code results along with the Address Verification Service (AVS), you can make more informed decisions about whether to accept transactions.

2.1.10 Using the Card Code

Enter the card code on the Virtual Terminal page when processing an order. The First Data Global Gateway Virtual Terminal compares the card code with the code from the card-issuing bank. The results of this comparison show in the transaction approval code.

The following string is a typical transaction result.

0097820000019564:YNAM: 12345678901234567890123:

The last alphabetic character in the middle (M) is a code indicating whether the card code matched the card-issuing bank's code.

2.1.11 Card Code Definitions

Card Code	Description
M	Card code matches.
N	Card code does not match.
P	Not processed.
S	Merchant has indicated that the card code is not present on the card.
U	Issuer is not certified and/or has not provided encryption keys.
X	No response from the credit card association was received.
A blank response indicates no code was sent and there was no indication the code was not present on the card.	

2.2 Ticket Only Transactions

From the Virtual Terminal section, you can make a Ticket Only transaction only after you run an Authorize Only transaction. The Ticket Only transaction completes the Authorize Only transaction.

Running an Authorize Only transaction reserves funds, but does not charge the customer's card. To charge the card, you must either mark the order as shipped in an Orders Received Report or perform a Ticket Only transaction.

A Ticket Only transaction is sometimes referred to as a post authorization transaction.

2.2.1 Performing a Ticket Only Transaction

1. Hold your mouse over Virtual Terminal on the **Main Menu Bar**, and then click **Ticket Only** on the popup menu.
2. Enter the Order number for the Authorize Only transaction. If you do not have your order number, you can find it in your reports.
3. After you enter the order number, click the **Retrieve Order** button.
A new page appears with several populated input fields related to the order. Review these fields to ensure you have selected the correct order.
4. If the order is correct, click the **CONTINUE >>** button. A new page appears. If the order is not correct, click on your browser's **Back** button to return to the previous page and retrieve an alternate order.
5. On the new page, click the **Submit** button to confirm all entries are valid; otherwise, click the **Return to POS** button to make the appropriate changes. If any fields are missing or incorrect, the Ticket Only page will reappear with an error message. The incorrect or missing fields are indicated by a warning graphic. Make the appropriate changes and then click the **CONTINUE >>** button again.

A final Transaction Result page appears indicating whether the transaction was approved or declined and displaying all the transaction information. For more information about transaction results, see "Transaction Results" on page 22.

2.3 Return Transactions

From the Virtual Terminal section, you can credit a customer's credit card when the customer makes a return.

2.3.1 Performing a Return Transaction

1. Hold your mouse over Virtual Terminal on the **Main Menu Bar**, and then click **Return** on the popup menu.
A page appears with a field for the order number. If you do not know the order number, you can find it in your reports.
2. When you have located the order number, enter it in the Order field; then click the **Retrieve Order** button.
A page appears showing all the existing information for that order.
3. Review these fields to ensure you have selected the correct order. If the order is incorrect, click on your browser's **Back** button to return to the previous page and retrieve an alternate order.

4. If the order is correct, enter the amount to return in the appropriate fields. By default, the fields will be populated with the total amount of the order. If your return amount is less than the order total, make corrections as appropriate.
5. When you have finished with the Order Information fields, change any other fields related to customer contact information, payment information, or comments. Then click the **CONTINUE >>** button.

A new page appears.

6. On the new page click the **Submit** button to confirm all entries are valid; otherwise, click the **Return to POS** button to make the appropriate changes. If any fields are missing or incorrect, the Return page will reappear with an error message. The incorrect or missing fields are indicated by a warning graphic. Make the appropriate changes and then click the **CONTINUE >>** button.

2.4 Credit Transactions

From the Virtual Terminal section, make a Credit transaction when you need to credit a customer's credit card for an order that occurred outside of the First Data Global Gateway Virtual Terminal.

There is some inherent risk of fraud with a Credit transaction, so not every merchant has permission to perform Credit transactions. If you do not see **Credit** listed in the **Side Menu Bar** or popup menu of the Virtual Terminal section, you either do not currently have permission to perform a Credit transaction or the Credit form has not been added to your Virtual Terminal forms.

Contact your processor's merchant services department to enable the function if you need to perform Credit transactions and do not have the option.

If you have permission to perform Credit transactions, you will see **Credit** in the Virtual Terminal popup menu and in the **Side Menu Bar** of the Virtual Terminal section. Use the Credit function only for orders received outside of the First Data Global Gateway Virtual Terminal. Use the Return function to do a credit for any First Data Global Gateway Virtual Terminal orders.

2.4.1 To Perform a Credit Transaction

1. Hold your mouse over **Virtual Terminal** on the **Main Menu Bar** and click **Credit** on the popup menu to display the Credit page.
Required fields here are similar to those on the Virtual Terminal page when making a credit card transaction.
2. Enter all the appropriate and required fields for your Credit transaction; then click the **CONTINUE >>** button.
A new page appears.
3. On the new page click the **Submit** button to confirm all entries are valid; otherwise, click the **Return to POS** button to make the appropriate changes.

If any fields are missing or incorrect, the Credit page reappears with an error message. The incorrect or missing fields are indicated by a warning graphic. Make the appropriate changes and then click the **CONTINUE >>** button again.

A confirmation page appears. Review the information; then click the **Submit** button. A final Transaction Result page appears indicating whether the transaction was approved or declined.

3 Reports

Use the Reports section to generate reports on Internet store activity from several different perspectives. To view your reports, click **Reports** on the **Main Menu Bar**.

3.0.1 Navigation

Within the Reports section, most screens contain the GENERATE REPORT >> button, which performs a search for the information requested.

3.0.2 Credit Card Numbers

As a security feature, only the first four and last four digits of the credit card number are displayed in your reports. The first four and last four digits are the Credit Card Identification (CCID) numbers. They are usually active links you can select to display information about all transactions involving that card number.

3.0.3 Reports

The reports available in the Reports section are listed below.

- Transactions (Reports, Charts, and Summaries)
- Orders
- Batches (Credit Card and Check)
- Item Sales Report
- Sales Tax Report
- Periodic Bills Report

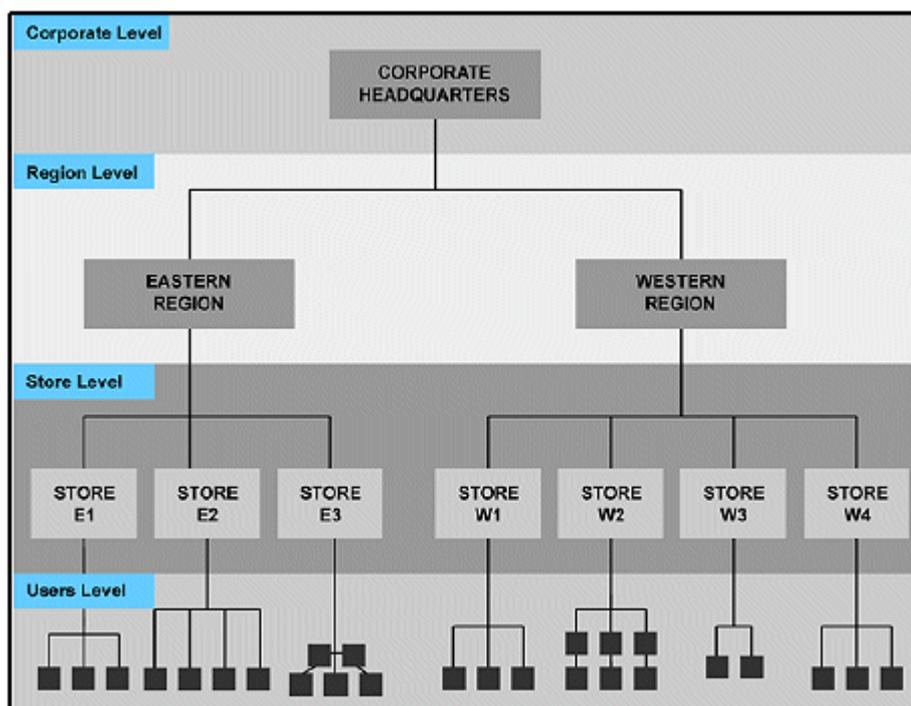
From the Reports section, you can also download report data.

3.1 Multi-Store Reports

Multi-store reports work similar to regular reports. The only difference is the report will show transactions from multiple stores as defined in the organizational structure set up in the Administration section. To view more about setting up multi-stores, see "Setting Up Multi-Store Reports".

To view multi-store reports in the First Data Global Gateway Virtual Terminal, you must have a separate multi-store administrative login ID and password.

There is a login ID and password for every element in the tree; when you log in as one of those elements, you are able to see reports for all the stores included below the element.



Example of a multi-store hierarchy.

In the diagram above, when you log in with the multi-store ID and password for the Corporate Headquarters element, your reports would include transactions for all stores in the structure. If you were to log in with the ID and password for the Eastern region, you would only see transactions from Stores E1, E2, and E3.

3.1.1 Accessing Multi-Store Reports

1. Click on the **Administrator Login** link on the regular First Data Global Gateway Virtual Terminal login page.
2. Enter your multi-store administrator ID and password.
3. Click the **Login** button.
4. Mouse over **Reports** in the **Main Menu Bar**, and choose any of the available reports in the popup menu.
5. Follow the instructions for viewing each individual report.

3.2 Transaction Charts

To view transaction charts, mouse over **Reports** on the **Main Menu Bar** and click **Transactions** on the popup menu, or from the Reports section, click **Transactions** on the **Side Menu Bar**. The Transaction Reports page appears.

There are four graphical chart types which are helpful for visualizing orders, sales, and presentations.

3.2.0.1 Chart Types

You can view your reports in the following chart types:

- Detail bar chart
- Summary bar chart
- Pie chart
- Strip chart

3.2.0.2 Viewing Transaction Charts

1. On the Transaction Reports page, choose Generate a **Chart** and select a chart type in the Transaction Reports section.
You can view your transactions in a bar chart, pie chart, strip (line) chart, or you can view a summary bar chart report.
2. Select options for viewing transactions in the Display Transactions By section. You can enter a user ID, a partial card number, an order number, transaction types, or card types to include in the report.
3. Select any of the named time periods or enter a specific range of dates you want to view in the For This Time Period section. Select the radio button next to the time period you selected.
4. Click the **GENERATE REPORT >>** button to view the report.

For multi-store reports, you can choose whether you want to view all stores below you in the hierarchy or a subset in the dropdown list. This is available only if you are logged in with your multi-store administrator ID.

3.2.1 Detail Bar Chart

To view a detailed bar chart, mouse over **Reports** on the **Main Menu Bar** and click **Transactions** on the popup menu, or from the Reports section, click **Transactions** on the **Side Menu Bar**. Choose options from the following sections to view your chart:

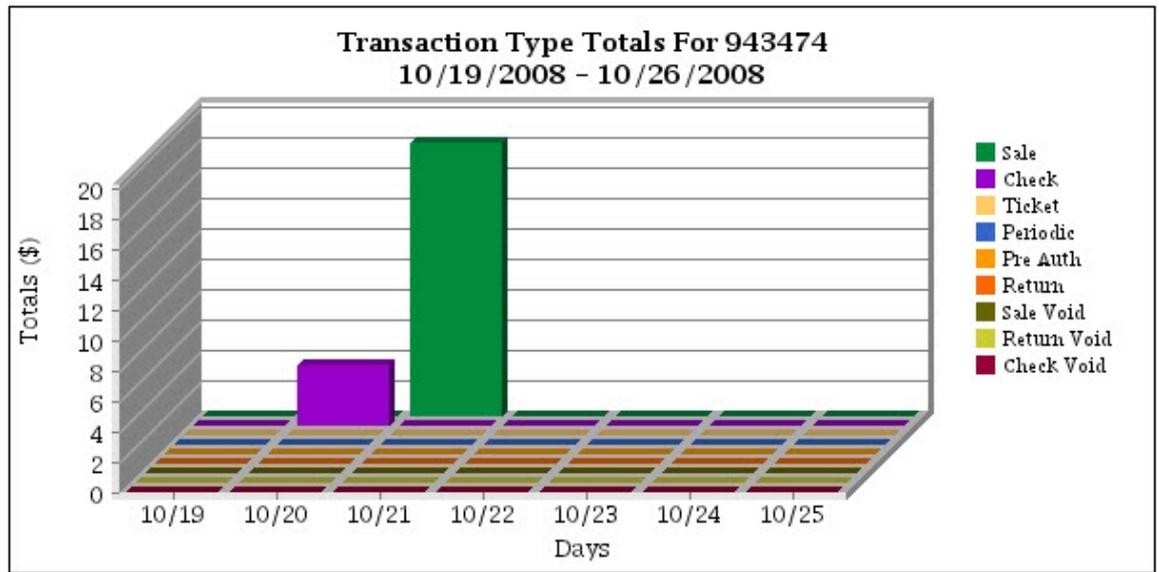
3.2.1.1 Viewing a Detail Bar Chart

1. In the Transaction Reports section, select Generate a **Chart** and select **Bar Chart Detail** as the Chart Type .
2. Select options for viewing transactions in the Display Transactions By section. You can enter a user ID, a partial card number, an order number, transaction types, or card types to include in the report.
3. Select any of the named time periods or enter a range of dates you want to view in the For This Time Period section. Select the radio button next to the time period you selected.
4. Click the **GENERATE REPORT >>** button to view the chart.

For multi-store reports, you can choose whether you want to view all stores below you in the hierarchy or a subset in the dropdown list. This is available only if you are logged in with your multi-store administrator ID.

A detailed bar chart shows a colored bar for each transaction type. The chart indicates the total dollar amount for each transaction type for each month of the time period specified.

The dates for the time period are shown on the horizontal (X) axis. The transaction dollar amounts are shown on the vertical (Y) axis. The transaction types are shown on the Z axis. The bars show the total amount for each month for each transaction type.



Example of a detailed bar chart.

You can see a separate chart and totals for each transaction type by clicking on any of the associated colored squares on the right side of the chart. When you click the square, a full list of transactions for that transaction type is displayed. To download the chart for later use, right click on the chart and select Save Image As.

The totals for each transaction type are also summarized in a table below the chart, which lists:

- **# of Approved Txns** - the number of approved transactions of the transaction type.
- **% of Total Approved Txns** - the percentage of the total approved transactions that were of the transaction type.
- **Total (\$) Amount** - the sum, in US dollars, of all the order totals for the transaction type.
- **% of Total (\$) Amount** - the percentage of the total transaction dollar amounts that were of the transaction type.
- **Avg. Txn (\$) Amount** - the average of all the transaction totals for the transaction type.
- **Net Settle (\$) Amount** - the net amount for all transactions of the transaction type. Negative amounts are shown in red. You will typically see negative amounts for Returns and Sale Voids.

The total for each column is also shown at the bottom of the chart.

3.2.2 Summary Bar Chart

To view a summary bar chart, mouse over **Reports** on the **Main Menu Bar** and click **Transactions** on the popup menu, or from the Reports section, click **Transactions** on the **Side Menu Bar**. Choose options from the following sections to view your chart:

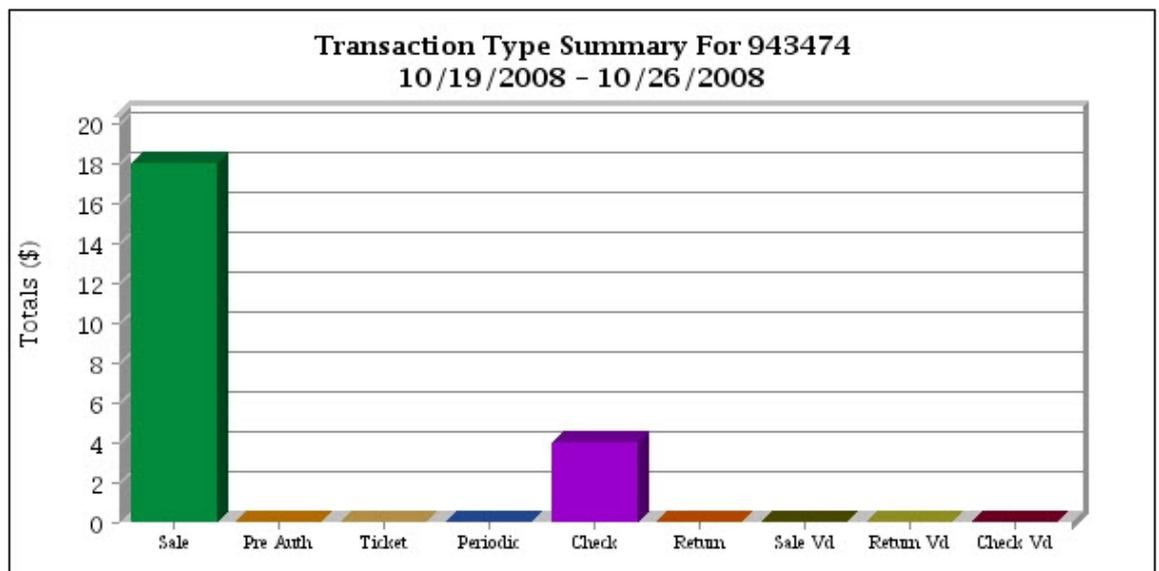
3.2.2.1 Viewing a Summary Bar Chart

1. In the Transaction Reports section, Select Generate a **Chart** and select **Bar Chart Summary** as the Chart Type.
2. Select options for viewing transactions in the Display Transactions By section. You can enter a user ID, a partial card number, an order number, transaction types, or card types to include in the report.
3. Select any of the named time periods or enter a range of dates you want to view in the For This Time Period section. Select the radio button next to the time period you selected.
4. Click the **GENERATE REPORT >>** button to view the chart.

For multi-store reports, you can choose whether you want to view all stores below you in the hierarchy or a subset in the dropdown list. This is available only if you are logged in with your multi-store administrator ID.

A bar chart summary shows a colored bar for each transaction type. The chart indicates the total dollar amount for each transaction type over the time period specified.

The transaction types are shown on the horizontal (X) axis. The transaction dollar amounts are shown on the vertical (Y) axis. The bars show the total amount for each transaction type over the full time period specified.



Example of a summary bar chart.

Clicking on a bar will display a full list of transactions for that transaction type. To download the chart for later use, right click on the chart and select Save Image As.

The totals for each transaction type are also summarized in a table below the chart, which lists:

- **# of Approved Txns** - the number of approved transactions of the transaction type.
- **% of Total Approved Txns** - the percentage of the total approved transactions that were of the transaction type.
- **Total (\$) Amount** - the sum, in US dollars, of all the order totals for the transaction type.

- **% of Total (\$) Amount** - the percentage of the total transaction dollar amounts that were of the transaction type.
- **Avg. Txn (\$) Amount** - the average of all the transaction totals for the transaction type.
- **Net Settle (\$) Amount** - the net amount for all transactions of the transaction type. Negative amounts are shown in red. You will typically see negative amounts for Returns and Sale Voids.

The total for each column is also shown at the bottom of the chart.

3.2.3 Pie Chart

To view a pie chart, mouse over **Reports** on the **Main Menu Bar** and click **Transactions** on the popup menu, or from the Reports section, click **Transactions** on the **Side Menu Bar**. Choose options from the following sections to view your chart:

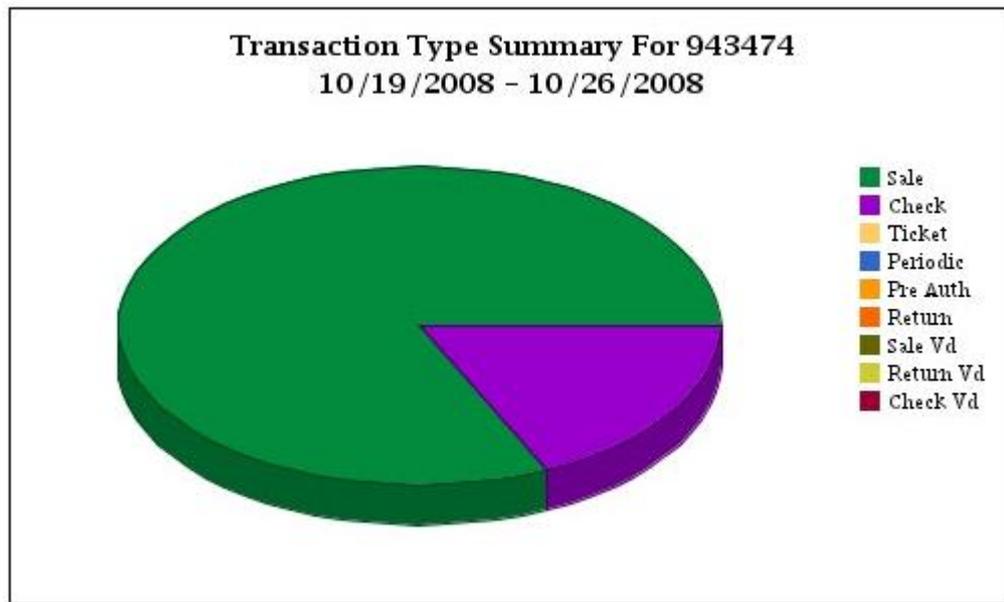
3.2.3.1 Viewing a Pie Chart

1. In the Transaction Reports section, select Generate a **Chart** and select **Pie Chart** as the Chart Type.
2. Select options for viewing transactions in the Display Transactions By section. You can enter a user ID, a partial card number, an order number, transaction types, or card types to include in the report.
3. Select any of the named time periods or enter a range of dates you want to view in the For This Time Period section. Select the radio button next to the time period you selected.
4. Click the **GENERATE REPORT >>** button to view the chart.

For multi-store reports, you can choose whether you want to view all stores below you in the hierarchy or a subset in the dropdown list. This is available only if you are logged in with your multi-store administrator ID.

A pie chart shows a colored pie slice for each transaction type. The chart indicates the percentage of each transaction type over the time period specified.

The pie slices show the total percentage for each transaction type.



Example of a pie chart.

You can see the total dollar amount for each transaction type by holding your mouse over any of the associated colored pie slices. Clicking on a slice will display a full list of transactions for that transaction type. To download the chart for later use, right click on the chart and select Save Image As.

The totals for each transaction type are also summarized in a table below the chart, which lists:

- **# of Approved Txns** - the number of approved transactions of the transaction type.
- **% of Total Approved Txns** - the percentage of the total approved transactions that were of the transaction type.
- **Total (\$) Amount** - the sum, in US dollars, of all the order totals for the transaction type.
- **% of Total (\$) Amount** - the percentage of the total transaction dollar amounts that were of the transaction type.
- **Avg. Txn (\$) Amount** - the average of all the transaction totals for the transaction type.
- **Net Settle (\$) Amount** - the net amount for all transactions of the transaction type. Negative amounts are shown in red. You will typically see negative amounts for Returns and Sale Voids.

The total for each column is also shown at the bottom of the chart.

3.2.4 Strip Chart

To view a strip chart, mouse over **Reports** on the **Main Menu Bar** and click **Transactions** on the popup menu, or from the Reports section, click **Transactions** on the **Side Menu Bar**. Choose options from the following sections to view your chart:

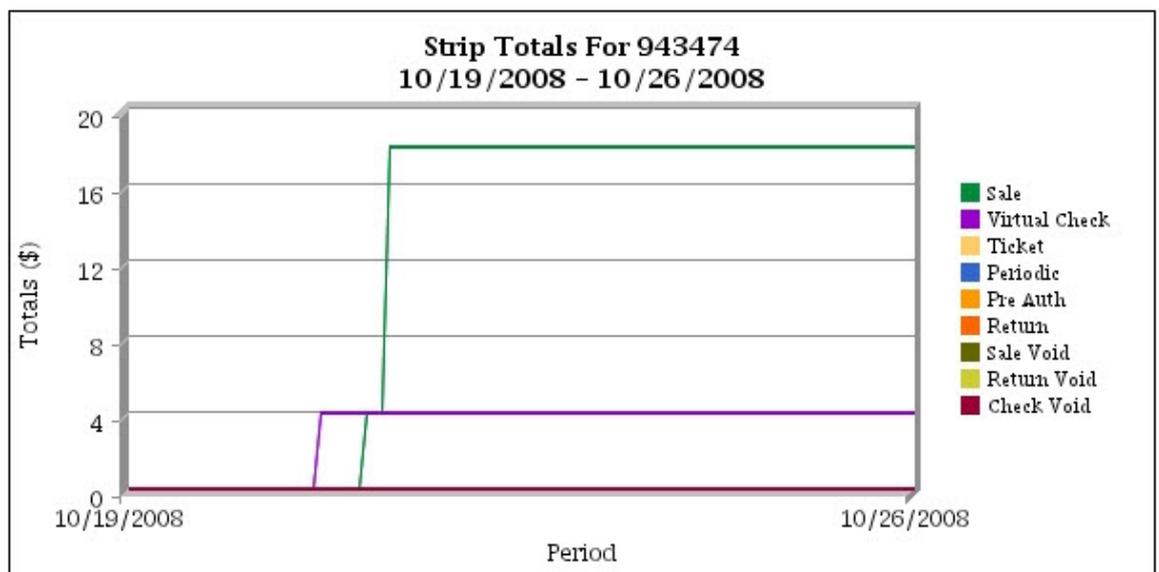
3.2.4.1 Viewing a Strip Chart

1. In the Transaction Reports section, select Generate a **Chart** and select **Strip Chart** as the Chart Type.
2. Select options for viewing transactions in the Display Transactions By section. You can enter a user ID, a partial card number, an order number, transaction types, or card types to include in the report.
3. Select any of the named time periods or enter a range of dates you want to view in the For This Time Period section. Select the radio button next to the time period you selected.
4. Click the **GENERATE REPORT >>** button to view the chart.

For multi-store reports, you can choose whether you want to view all stores below you in the hierarchy or a subset in the dropdown list. This is available only if you are logged in with your multi-store administrator ID.

A strip chart shows a colored line for each transaction type. The chart indicates the total dollar amount of each transaction type over the time period specified.

The dates for the time period are shown on the horizontal (X) axis. The transaction amounts are shown on the vertical (Y) axis. The line follows the total amount for each transaction type.



Example of a strip chart.

You can see a separate chart and totals for each transaction type by clicking on any of the associated colored squares on the right side of the chart. To download the chart for later use, right click on the chart and select Save Image As.

The totals for each transaction type are also summarized in a table below the chart, which lists:

- **# of Approved Txns** - the number of approved transactions of the transaction type.
- **% of Total Approved Txns** - the percentage of the total approved transactions that were of the transaction type.
- **Total (\$) Amount** - the sum, in US dollars, of all the order totals for the transaction type.

- **% of Total (\$) Amount** - the percentage of the total transaction dollar amounts that were of the transaction type.
- **Avg. Txn (\$) Amount** - the average of all the transaction totals for the transaction type.
- **Net Settle (\$) Amount** - the net amount for all transactions of the transaction type. Negative amounts are shown in red. You will typically see negative amounts for Returns and Sale Voids.

The total for each column is also shown at the bottom of the chart.

3.3 Orders Received Report

To view Orders Received reports, mouse over **Reports** on the **Main Menu Bar** and click **Orders** on the popup menu, or from the Reports section, click **Orders** on the **Side Menu Bar**. The Orders Report page appears.

3.3.0.1 Generating an Orders Report

1. On the Order Reports page, select an option in the Display Orders By section. You can view orders sorted by:
 - Time
 - Credit card number.
 - User ID and time.
 - Order number.

You can enter a user ID, a partial card number, an order number, transaction types, or card types to include in the report.
2. Select any of the named time periods or enter a specific range of dates you want to view in the For This Time Period section. Select the radio button next to the time period you selected.
3. Click the appropriate checkbox to show only unshipped orders or to show only approved orders in the Report Options section.
 - By default, the **Only Show Unshipped Orders** checkbox is not checked and the **Only Show Approved Orders** checkbox is checked, so the report will show approved orders only (both shipped and unshipped).
 - If both checkboxes are not checked, the report will display all orders (both shipped and unshipped), including declined, recurring, and Authorize Only transactions with future start dates.
 - If the **Only Show Unshipped Orders** checkbox is checked, the report will show all unshipped orders.
 - If both checkboxes are checked, the report will show only all approved, unshipped orders.
4. Choose how many orders will appear on each page of the report in the dropdown list in the Report Display section.
5. Click the **GENERATE REPORT >>** button to view the report.

For multi-store reports, you can choose whether you want to view all stores below you in the hierarchy or a subset in the dropdown list. This is available only if you are logged in with your multi-store administrator ID.

3.3.0.2 The Orders Received Report

The Orders Received Report shows the following information:

- **Select** - click on the associated **Select** checkbox to select one or more orders.
- **Shipped** - shows Y if the order has been shipped, or N if the order has not been marked as shipped.
- **Retail** - shows Y if the order was a retail order, or N if the order was not retail.
- **Order #** - the number associated with the order. Click on the order number to view order details.
- **User ID** - the ID number associated with the order. The number is also a link to view all the orders placed by a particular customer.
- **Date** - the date the order was made. Shows the most recent order first. The time period you selected for the report will be shown under the report title.
- **Name** - the name of the person who placed the order. Click on the name to send email to the customer.
- **Amount** - shows the amount of the order if already shipped. If the order has not been shipped, the amount will be 0.00.

The total amount of the orders listed on the page and the total amount of all orders in this report are shown at the bottom of the page along with the total tax and shipping charges collected.

Select	Shipped	Retail	Order#	User ID	Date	Name	Amount
<input type="checkbox"/>	Y	N	172.30.184.67-11D08D8791B-18488EF-3CA56F	943474	10/16/2008 08:28:03 PM	Jen Fonda	56.45
	Y	N	172.30.184.67-11D08D7FE1B-18488EF-1A8ECF4	943474	10/16/2008 08:27:32 PM	Jen Fonda	56.00
	Y	N	172.30.184.67-11D08D794ED-18488EF-A3CE3F	943474	10/16/2008 08:27:05 PM	Jen Fonda	35.00
	Y	N	172.30.184.67-11D08D55B45-18488EF-1262667	943474	10/16/2008 08:24:38 PM	Jen Fonda	59.00
	Y	N	172.30.184.67-11D029ED6B-18488EF-F36E59	943474	10/15/2008 03:27:17 PM	First Last	1.00
	Y	N	172.30.184.67-11D02524E1D-18488EF-3C37F4	943474	10/15/2008 02:03:47 PM	Wells Fargo	60.00
	Y	N	172.30.184.67-11D024FEA80-18488EF-5EAD9D	943474	10/15/2008 02:01:11 PM	Wells Fargo	50.00
<input type="checkbox"/>	Y	N	172.30.184.67-11CFD76BF6F-180A8B7-1C87093	943474	10/14/2008 03:25:30 PM	Amar Bhowalkar	1.00
<input type="checkbox"/>	Y	N	172.30.184.67-11CFD584CBC-180A8B7-1CEE361	943474	10/14/2008 02:52:14 PM	C N	1.00
<input type="checkbox"/>	Y	N	172.30.184.67-11CFD4AD8AE-180A8B7-1CC874	943474	10/14/2008 02:37:32 PM	C N	1.00
	Y	N	172.30.184.67-11CFCD56967-180A8B7-15C2843	943474	10/14/2008 12:29:16 PM	Test CN	1.00
	Y	N	172.30.184.67-11CFDBA7E0-DEDF00-18B3E62	943474	10/14/2008 12:00:03 PM	Amar Bhowalkar	1.00
	Y	N	172.30.184.67-11CD86DC63-1342545-90FD20	943474	10/07/2008 10:49:47 AM	Dow Jones	1.00
	Y	N	172.30.184.67-11CD4F57412-1342545-14B525C	943474	10/06/2008 06:39:20 PM	Dow Jones	1.00
	Y	N	172.30.184.67-11CBFA2440D-1342545-130671E	943474	10/02/2008 03:16:28 PM	Amar Bhowalkar	1.00
<input type="checkbox"/>	Y	N	172.30.184.67-11C9B763AB5-2BFDFF-1E3E7D2	943474	09/25/2008 02:42:04 PM	Amar Bhowalkar	1.00
	Y	N	check2_TestGA_24Sept_009	943474	09/24/2008 04:01:57 PM	ff ff sddd	1.00
	Y	N	check2_TestGA_24Sept_001	943474	09/24/2008 02:17:58 PM	Test Cust	37.00
<input type="checkbox"/>	Y	N	172.30.184.67-11C91F29412-2BFDFF-12022B7	943474	09/23/2008 06:21:41 PM	Rick Bunky	1.00
<input type="checkbox"/>	Y	N	172.30.184.67-11C91ECC3FC-18E4327-1AF8502	943474	09/23/2008 06:17:32 PM	Rick Bunky	1.00
<input type="checkbox"/>	Y	N	172.30.184.67-11C91EDE914-2BFDFF-1D1CDF7	943474	09/23/2008 06:16:36 PM	Rick Bunky	1.00
	Y	N	check2_TestGA_NoSSN-03	943474	09/23/2008 04:43:04 PM	Test Cust Name	37.00
	Y	N	check2_TestGA_NoSSN-02	943474	09/23/2008 04:42:06 PM	Test Cust Name	37.00
	Y	N	check2_TestGA_NoSSN-01	943474	09/23/2008 04:30:48 PM	Test Cust Name	37.00
	Y	N	check2_TestGA_NoSSN	943474	09/23/2008 04:12:21 PM	Test Cust Name	37.00
PAGE TOTAL:							515.45
REPORT TOTAL:							783.45
Tax And Shipping							
			Tax				0.00
			Shipping				0.00

Example of the Orders Received Report.

3.3.0.3 Confirming Shipment, Crediting Orders, or Rejecting Orders

You can confirm shipment, credit the entire amount of the order(s), or reject order(s) by IP address or credit card number from this report.

To perform any of these three tasks, follow the steps below.

1. Select order(s) by clicking on the checkbox next to the order in the column on the left.
2. Click the **Work with Selected Orders** button.
The Selected Order Menu screen appears.
3. Select an action by clicking on the appropriate radio button.
If you select **Reject Order**, you must also choose whether you want to reject the order by IP address or by credit card number. When you reject an order by IP address, all future orders from that IP address are blocked. When you reject an order by credit card number, all future orders using that credit card number are blocked.
4. Click the **SUBMIT** button to complete the task.
A screen listing the results will appear.

If you choose to reject an order by IP address or credit card number, the Fraud Settings page appears. This page displays all the IP addresses and credit card numbers you have currently blocked from your store.

The IP addresses or credit card numbers from the order(s) you just blocked should appear on this list. To block more transactions or to remove blocked transactions, use the corresponding controls on the Fraud Settings page.

For more information on changing your fraud protection settings, see "Fraud Settings" on page 45.

3.3.0.4 Email

If the customer's name is underlined, you can email that customer by clicking on the customer's Name.

3.3.0.5 Viewing Details

View the details of any order by clicking on the associated order number. View all orders processed by a customer by clicking the **User ID** link.

If there are more orders in the report than will fit on the current page, click on the page number to go to that page.

Viewing an Order Detail report.

When viewing an order detail report, the following information is displayed:

- Order ID Number and Order Date/Time - the order ID number you selected and the date and time the order was made.
- Billing Address Information section - this section displays the User ID, shipping status, and the customer's company name and address. If the customer's name and e-mail address were supplied, you can click on the customer's name to send an email to the customer.
- Shipping Address Information section - this section displays the name of the person and address where the order was shipped.
- Contact Information section - shows the customer's telephone number, email address, fax number, and IP address. If an email address was supplied, you can click on the customer's email address to send an email to the customer.
- General Info:General information about the order.

- Where they heard about you.

The next part of the report includes subtotal, shipping, tax, return (if applicable) and total amounts. The last portion of the report is a transaction history which shows all transactions related to the order.

The summary information shown includes:

- Date
- User ID
- Type of transaction
- Card number
- Expiration date
- Approval code
- Amount of the transaction
- Comments

3.4 Transactions

To view the Transactions reports, mouse over **Reports** on the **Main Menu Bar** and click **Transactions** on the popup menu, or from the Reports section, click **Transactions** on the **Side Menu Bar**. Choose options from the following sections to view your reports:

3.4.1 Viewing the Transactions Processed Report

1. Select Generate a **Report** from the dropdown list in the Transaction Reports section.
2. Select options for viewing transactions in the Display Transactions By section. You can enter a user ID, a partial card number, an order number, transaction types, or card types to include in the report.
3. Select any of the named time periods or enter a range of dates you want to view in the For This Time Period section. Select the radio button next to the time period you chose.
4. Choose how many orders you want to appear on one page from the dropdown list in the Report Display section. The default is 25.
5. Click the **GENERATE REPORT >>** button to view the report.

For multi-store reports, you can choose to view all stores below your ID allowances in the hierarchy or choose from the dropdown list. You can do this only if you are logged in with your multi-store administrator ID.

The Transactions Processed report shows the following information about each transaction.

- **Order #** - the number associated with the order. Click on the order number to view order details.
- **Date** - the date the order was made. Shows the most recent order first. The time period you selected for the report is displayed under the report title.
- **User ID** - the ID number associated with the order. The number is also a link to view all the orders made by a particular customer.
- **Type** - the type of transaction.
- **Payer Auth** - if applicable, the payer's authorization code.

- **Invoice #** - the order's invoice number.
- **PO #** - the purchase order number (for a purchasing card transaction)
- **Trans ID** - the identification number for the transaction.
- **Card/Route Number** - a link to view all transactions processed with that credit card number.
- **Exp. Date** - the expiration date of the credit card.
- **Approval** - the approval code of the transaction. If approved, the approval code includes Address Verification System (AVS) results. If a specific transaction was declined, the reason it was declined is shown here.
- **Amount** - the amount of the transaction.

Transactions Processed Run Another Transaction Report ?

Prepared For: Export All Report Data:

Time Frame: 10/01/2008 - 10/31/2008

Order #	Date	User ID	Type	PayerAuth	Invoice #	PO #	Trans ID	Card/Route Number	Exp. Date	Approval	Amount
172.30.184.67-11D067F81D8-18488EF-1B258FA	10/16/2008 09:31:38 AM	943474	Sale				100020496040	4111...1111	01/2009	N Declined	3,090.67
172.30.184.67-11D067E816E-18488EF-1D5B945	10/16/2008 09:30:33 AM	943474	Sale				100020496033	4111...1111	01/2009	N Declined	3,090.67
172.30.184.67-11D067DC56D-1488D9D-13F212A	10/16/2008 09:29:45 AM	943474	Sale				100020496031	4111...1111	01/2009	N Declined: X	3,090.67
172.30.184.67-11D06759C7C-1488D9D-14F5A31	10/16/2008 09:20:50 AM	943474	Sale				100020496015	4111...1111	01/2009	N Declined: X	1,372.74
172.30.184.67-11D036C75A1-18488EF-3C9816	10/15/2008 07:11:58 PM	943474	Check					121140713		N Declined	14.00
eriktest101	10/15/2008 03:57:05 PM	943474	Check					123456780		N Declined	1.00
172.30.184.67-11D029EBD6B-18488EF-F38E59	10/15/2008 03:27:17 PM	943474	Check					111904869		Y:NEW0002031510	1.00
172.30.184.67-11CFD4AD8AE-180A8B7-1CEC874	10/15/2008 02:06:07 PM	943474	Periodic					051903761		N Declined	1.00
172.30.184.67-11CFD584CBC-180A8B7-1CEE361	10/15/2008 02:06:07 PM	943474	Periodic					051903761		N Declined	1.00
172.30.184.67-11CFD78EF8F-180A8B7-1C87093	10/15/2008 02:06:07 PM	943474	Periodic					055001054		N Declined	1.00
172.30.184.67-11CFD4AD8AE-180A8B7-1CEC874	10/15/2008 02:04:06 PM	943474	Periodic					051903761		N Declined	1.00
172.30.184.67-11CFD78EF8F-180A8B7-1C87093	10/15/2008 02:04:05 PM	943474	Periodic					055001054		N Declined	1.00
172.30.184.67-11CFD584CBC-180A8B7-1CEE361	10/15/2008 02:04:05 PM	943474	Periodic					051903761		N Declined	1.00
172.30.184.67-11D02524E1D-18488EF-	10/15/2008 02:03:47 PM	943474	Check					122000496		Y:PENDING0002031491	60.00

Example of a Transactions Processed report.

3.5 Transactions Summary

To view the Transactions Summary report, mouse over **Reports** on the **Main Menu Bar** and click **Transaction Summary** on the popup menu, or from the Reports section, click **Transaction Summary** on the **Side Menu Bar**.

3.5.1 Viewing the Transaction Summary Report

1. Select options in the Display Transactions Summary section. You can enter a user ID, a partial card number, an order number, transaction types, or card types to include in the report.
2. Select any of the named time periods or enter a range of dates you want to view in the For This Time Period section. Select the radio button next to the time period you chose.
3. Choose how many orders you want to appear on one page from the dropdown list in the Report Display section. The default is 25.

- Click the **GENERATE REPORT >>** button to view the report.

For multi-store reports, you can choose to view all stores below your ID allowances in the hierarchy or choose from the dropdown list. You can do this only if you are logged in with your multi-store administrator ID.

3.5.1.1 Authorization Summary Table

The first table that appears in the Transaction Summary report shows the following summary information for each selected transaction type over the time period specified.

- Approved** - shows the total number and the total dollar amount for approved transactions.
- Declined** - shows the total number and the total dollar amount for declined transactions.
- Total** - shows the total number and the total dollar amount for all transactions.

The totals for each column are listed at the bottom of the table.

3.5.2 Approved Summary Table

The second table that appears in the Transactions Summary report displays summary information for each payment type, such as credit card type, over the time period specified.

The totals for each column are listed at the bottom of the table.

Transaction Summary Report
[Run Another Transaction Report ?](#)

Prepared For:
Time Frame: 10/01/2008 - 10/31/2008

Authorization Summary

Type	Approved		Declined		Total	
	#	Amount	#	Amount	#	Amount
Sale	0	0.00	8	10,693.53	8	10,693.53
Auth	0	0.00	0	0.00	0	0.00
TOTAL	0	0.00	8	10,693.53	8	10,693.53

Approved Summary by Card Type

Type	Visa		Master Card		Total	
	#	Amount	#	Amount	#	Amount
Sale	0	0.00	0	0.00	0	0.00
Auth	0	0.00	0	0.00	0	0.00
TOTAL	0	0.00	0	0.00	0	0.00

Example of a Transaction Summary report.

3.6 Credit Card Batches Reports

To view credit card batch reports, mouse over Reports on the **Main Menu Bar** and click **Batches** on the popup menu, or from the Reports section, click **Batches** on the **Side Menu Bar**. The Credit Card Batches report shows the date range you selected under the report title.

3.6.1 Credit Card Batches

1. Select **Credit Card** as the Report Type in the Batch Report Type section.
2. Select any of the named time periods or enter a specific range of dates you want to view in the For This Time Period section. Select the radio button next to the time period you chose.
3. Choose how many orders you want to appear on one page from the dropdown list in the Report Display section. The default is 25.
4. Click the **GENERATE REPORT >>** button to view the report.

For multi-store reports, you can choose to view all stores below your ID allowances in the hierarchy or choose from the dropdown list. You can do this only if you are logged in with your multi-store administrator ID.

To view all the orders in the current batch, click on the **Run Current Batch** button. You will see the Current Batch report.

The Credit Card Batches report contains the following information:

- **Date** - the batch dates. Click the **Current Batch** button to view the transactions in the batch.
- **Count** - the total number of transactions in the batch.
- **Response** - contains no data.
- **Total** - the total dollar amount of the batch.

Credit Card Batches

Prepared For:

Time Frame: 10/15/2008 - 10/21/2008

Date	Count	Response	Total
10/21/2008 01:14:32 PM	1		\$4.00
10/17/2008 03:52:37 PM	1		\$1.00

Showing 1 - 2 of 2 Results Found

Example of the Credit Card Batches report.

3.6.2 Voiding Orders

The Current Batch report allows you to void orders by selecting them, then clicking on the **Void Selected Transactions** button at the bottom of the page. You can only void orders that have not been settled.

How to Void Orders

1. Click the **Current Batch** button to display the Current Batch report.

2. Select the orders you want to void by clicking on the corresponding checkboxes in the left column.
3. Click the **Void Selected** button at the bottom of the page.
The Void Transaction Results page appears.

Each order you chose to void appears on the list. You can only void orders that have not been settled.

3.7 Sales Tax Report

To view sales tax reports, mouse over **Reports** on the **Main Menu Bar** and click **Sales Tax Report** on the popup menu, or from the Reports section, click **Sales Tax Report** on the **Side Menu Bar**. The Sales Tax report shows the date range you selected under the report title and lists the total at the bottom of the report.

3.7.1 Viewing Sales Tax Reports

1. Select any of the named time periods or enter a specific range of dates you want to view in the For This Time Period section. Select the radio button next to the time period you chose.
2. In the For These States section, select a state from the dropdown list or select **ALL States** to view a report on all states.
Hold down the Shift key, then click to select several states in a row (such as Alabama through Arkansas). Hold down the Ctrl key, then click to select states in different parts of the list (such as Alabama and California).
3. Select any option or combination of options to customize your report in the Options section.
You can choose to show municipalities, to show only states with taxes collected, and/or to show only states with orders.
4. Click the **GENERATE REPORT >>** button to view your report.

For multi-store reports - You can choose whether you want to view all stores below you in the hierarchy or a subset in the dropdown list available only if you are logged in with you multi-store administrator ID.

3.8 Downloading Report Data

The First Data Global Gateway Virtual Terminal gives you the option to download all report data to enter into spreadsheets or databases. You can download charts by right-clicking on the image, then selecting **Save Image As**.

To download the data, you first need to generate the report.

1. Mouse over **Reports** on the **Main Menu Bar** and click on the report you want to view on the popup menu, or from the Reports section, click on the report you want to view in the **Side Menu Bar**.
2. Choose your desired timeframes and other parameters; then click the **GENERATE REPORT >>** button to view the report.
If you're looking at a transaction chart, you can view the data related to any of the bars, pie slices, or lines on the chart by clicking on that bar, pie slice, or line.
3. When the data appears on the report, choose the desired format from the dropdown list next to the **EXPORT >>** button. Choices are:
 - CSV (Comma delimited)

- XML
4. Click the **EXPORT >>** button.
 5. Save the file to your computer.

4 Administration

Use the Administration section to manage your account and customize the Virtual Terminal settings. Click **Administration** on the **Main Menu Bar** to access the Administration section.

You can perform any of the following functions in the Admin section.

- Manage users.
- Change your password.
- Change your fraud settings.
- Customize virtual terminal content.
- Customize the Product Catalog.
- Customize receipts.
- Customize Connect pages.
- Set up your multi-store hierarchy.

4.1 Fraud Settings

There are several ways the First Data Global Gateway Virtual Terminal helps prevent fraud. With the First Data Global Gateway Virtual Terminal, you can block anyone from purchasing at your store.

Tip: Blocking can help keep your competitors from buying your products.

To change your fraud settings, mouse over **Administration** in the **Main Menu Bar** and click **Fraud Settings** in the popup menu, or from the Administration section, click **Fraud Settings** on the **Side Menu Bar**.

4.1.0.1 Fraud Settings

You can perform the following fraud settings tasks:

- View all fraud settings.
- Block credit card numbers.
- Block a person's name.
- Block domain names.
- Block IP and Class C addresses.
- Set a maximum purchase amount.
- Set auto lockout and duplicate lockout times.

4.1.0.2 Address Verification Codes

Another way to prevent fraud is by viewing the address verification response. If the address or zip code do not match the card-issuing bank's address or zip code on record, there is a higher probability of fraud.

4.1.0.3 Card Codes

For more fraud protection, you should use the card code field. For more information about card codes, see "Card Codes" on page 23.

4.1.1 Viewing All Fraud Settings

From the Fraud Settings page, click the **View Current Fraud Settings** link in the Fraud Settings section at top to see all your fraud settings. To edit Fraud Settings from this page, click one of the **Edit Fraud Settings** buttons on this page.

4.1.2 Blocking Credit Card Numbers

From the Fraud Settings page, use the **Block Credit Card Numbers** section to enter the credit card numbers that you do not want used at your store. If you have already blocked credit card numbers, those numbers will appear in the list labeled Numbers Already Blocked.

4.1.2.1 Add a Credit Card Number

1. Enter the card number you want to block in the **Card Number to Block** field.
2. Click the **ADD >** button.

When you click the **ADD >** button, the change is submitted to the First Data Global Gateway Virtual Terminal server which adds the card number to your list of blocked card numbers. The First Data Global Gateway Virtual Terminal places the new card number in the Numbers Already Blocked list.

If this blocked card is used to purchase anything at your store, the transaction will be blocked. Add as many card numbers as you want by repeating the same process.

4.1.2.2 Remove a Blocked Credit Card Number

1. Select the card number in the **Numbers Already Blocked** list.
2. Click the **< DELETE** button.

Upon removal from your blocked card list, the card number can be used at your store. Delete as many blocked card numbers as you need by repeating the same process.

4.1.3 Blocking Names

From the Fraud Settings page, use the **Block Person's Name** section to enter the name of the person you want to block from purchasing at your store. If you have any names already on your blocked names list, they will appear in the list labeled Names Already Blocked.

To block a person by name, you must enter the name as it appears on the credit card. So, for example, if you block the name "John Redenbacher" from your store, "Johnny Redenbacher", "John Samuel Redenbacher" or "John S. Redenbacher" would not be blocked. You will block all persons with the same name as the person you want to block.

4.1.3.1 Add a Name

1. Enter the name you want to block in the **Person's Name to Block** field.
2. Click the **ADD >** button. Spaces and/or dashes are optional.

When you click the **ADD >** button, the change is submitted to the First Data Global Gateway Virtual Terminal server which adds the name to your list of blocked names. The First Data Global Gateway Virtual Terminal places the new name in the Names Already Blocked list.

If the blocked person attempts to purchase anything at your store, the transaction will be blocked. Add as many names as you want by repeating the same process. You may want to enter all different versions of that name that you can think of.

4.1.3.2 Remove a Blocked Name

1. Select the name in the **Names Already Blocked** list.
2. Click the **< DELETE** button.

Upon removal from your blocked name list, the person can purchase at your store. Delete as many blocked names as you need by repeating the same process.

4.1.4 Blocking Domain Names

From the Fraud Settings page, use the **Block Domain Name** section to enter the domain name or email address you want to block from being used to purchase at your store. If you have any domain names or email addresses already on your blocked domain names list, they will automatically appear in the list labeled Domains Already Blocked.

4.1.4.1 Add a Domain Name

1. Enter the domain name or email address you want to block in the **Domain Name to Block** field.
2. Click the **ADD >** button. Spaces and/or dashes are optional.

When you click the **ADD >** button, the change is submitted to the First Data Global Gateway Virtual Terminal server which adds the domain name or email address to your list of blocked domain names and email addresses. The First Data Global Gateway Virtual Terminal places the new name in the Domains Already Blocked list.

If the blocked email address or domain name is used to purchase anything at your store, the transaction will be blocked. Add as many domain names and email addresses as you want by repeating the same process.

4.1.4.2 Remove a Blocked Domain Name

1. Select the domain name or email address in the **Domains Already Blocked** list.
2. Click the **< DELETE** button.

Upon removal from your blocked domain name list, the domain name or email address can be used to purchase at your store. Delete as many domain names and email addresses as you need by repeating the same process.

4.1.5 Blocking IP/Class C Addresses

From the Fraud Settings page, use the **Block IP Address or Class C Address** section to enter the IP or Class C address of the person or organization you want to block from purchasing at your store. If you have any IP or Class C addresses already on your blocked list, they will automatically appear in the list labeled IPs Already Blocked.

An IP or Class C address is a number that is used to identify a specific computer on a network or on the Internet. The format of an IP address is written as four numbers

separated by periods. Each number can be zero to 255. For example, 1.160.10.240 could be an IP address.

4.1.5.1 Add an IP or Class C Address

1. Enter the IP or Class C address you want to block in the **IP Address to Block** field.
2. Click the **ADD >** button. Spaces and/or dashes are optional.
When you click the **ADD >** button, the change is submitted to the First Data Global Gateway Virtual Terminal server which adds the address to your list of blocked names. The First Data Global Gateway Virtual Terminal places the new address in the IPs Already Blocked list.

If the blocked address is used to purchase anything at your store, the transaction will be blocked because of fraud. Add as many addresses as you want by repeating the same process.

4.1.5.2 Remove an IP or Class C Address

1. Select the IP or Class C address in the **IPs Already Blocked** list.
2. Click the **< DELETE** button.

Upon removal from your blocked address list, the person can purchase at your store. Delete as many addresses as you need by repeating the same process.

4.1.6 Setting the Maximum Purchase Amount

From the Fraud Settings page, use the **Maximum Purchase Amount** section to enter the maximum amount for a purchase. Any transactions for your store above this amount will be blocked. The default and maximum purchase limit per transaction is \$99,999.99.

To enter a maximum purchase limit, enter the amount in the **Maximum Purchase Amount** field. Then click the **SUBMIT** button.

4.1.7 Setting Autolockout and Duplicate Lockout Times

From the Fraud Settings page, use the **Set Lockout Times** section to enter auto lockout and the duplicate lockout time.

The **Auto Lockout** time is the amount of time (in minutes) before blocked customers can make transactions at your store again. When Auto Lockout is enabled, duplicate transactions from the same IP address or credit card are blocked. The field is used to set the time period the IP address and credit card will remain blocked. If this value is set to zero, automatic lockout based on IP and Credit Card is turned off. The default setting is off.

The **Duplicate Lockout** time is the length of time (in minutes) duplicate transactions are restricted from your store. If two transactions are identical and they both occur within a length of time less than the specified duplicate lockout time, they will be automatically blocked as duplicate transactions. If this value is set to zero, automatic lockout based on duplicate transactions is turned off. The default setting is 10 minutes.

To change your auto lockout or duplicate lockout time, enter a time in the **Auto Lockout Time** or **Duplicate Lockout Time** field respectively; then click the **SUBMIT** button.

The system will display a confirmation message when the new lockout times are in place.

4.2 Changing Your Password

To change your password, mouse over **Administration** in the **Main Menu Bar** and click **Change Password** in the popup menu, or from the Administration section, click **Change Password** on the **Side Menu Bar**.

You can also change your password from any page by clicking the **Change Password** link in the upper right corner of the application.

The Change Your Password page appears. When you first sign up for an account with the First Data Global Gateway Virtual Terminal, you are provided with a temporary password. Temporary passwords will be valid for 30 minutes after they are issued. You should regularly change your password on this page.

4.2.1 Choosing a Password

Security specialists recommend that you avoid using common words or numbers as passwords. Avoid words or numbers that might be associated with you, like your name or your date of birth.

4.2.2 Password Handling

There are several different security measures in place to help ensure that your account information is protected and is compliant with Payment Card Industry (PCI) guidelines.

Password guidelines are listed below:

- Password length must be at least 7 characters and contain at least one letter and one number.
- Passwords are required to be changed every 90 days.
- Passwords can not be re-used. When changing a password, the password you select cannot be among the previous 4 passwords for your account.
- After 6-consecutive failed login attempts, a 30 minute temporary account lockout will occur.

4.2.3 Changing Your Password

1. Type your current password in the **Current Password** field.
2. Type your new password in the **New Password** field.
3. Type the password again in the **Enter New Password Again** field.
4. Click the **SUBMIT** button.

If you accidentally mistype your password, you will be asked to re-enter the information. For added security, the error message will not specify which entry is at fault.

When you successfully changed your password, you may choose either to go into the main Administration section to configure aspects, such as Fraud Settings, or you may use any of the menu entries available, either on the **Main Menu Bar** at the top of the screen or in the **Side Menu Bar**.

4.3 Managing Users

To manage users, click **Administration** in the **Main Menu Bar**, and then click **Manage Users** on the **Side Menu Bar**. You can have multiple users for one store. Each user can log in with a user ID, password, and permissions.

You can only manage users if your user ID and password were provided when the store account was set up. Users who do not have permission to manage other users will not see **Manage Users** on the **Side Menu Bar**.

From the Manage Users page, you can:

- Add users.
- Delete users.
- Reset user passwords.
- Set user permissions.

4.3.1 Adding Users

1. Click the **ADD USER** button located at the bottom of the page.
The Add New User screen appears.
2. Enter a unique user ID for the new user in the **Name** field.
3. Enter a password for your new user in the **Enter Password** field.
4. Enter the password again in the **Enter Password Again** field.
5. Click the **SUBMIT** button to create the new user.
The Current Users list appears, showing the new user on the list.

The user can change his/her own password by using the **Change Password** link at the top right corner of the application.

4.3.2 Deleting Users

1. Click the **Delete User** link located next to the user you want to delete.
A dialog box appears stating that this operation will delete the user you selected.
2. Click **OK** to delete the user or click **Cancel** if you do not want to delete the user.
When the user is deleted, the page refreshes with that user removed from the list.

4.3.3 Resetting User Passwords

If a user forgets his/her password and you need to reset it, do the following:

1. Click the **Reset Password** link next to the user who needs a new password.
2. Enter a password for your new user in the **Enter Password** field.
3. Enter the password again in the **Enter Password Again** field.
4. Click the **SUBMIT** button.

The user can change the temporary password by using the Change Password link at the top right corner of the application.

4.3.4 Setting User Permissions

You can set user permissions, such as viewing reports, processing transactions, and issuing credits.

1. Click the **Set Permission** link next to the user name.
The Change User Permissions page appears.
2. Click the appropriate checkboxes to turn on or off permissions for the user.
You can control the user's access to View Reports, Process Transactions, or Issue Credits.
3. Click the **SUBMIT** button.

4.4 Multi-Store Reporting

If you have multiple accounts with different store numbers and want a report showing combined transaction data across all accounts, then you can use multi-store administration and reporting.

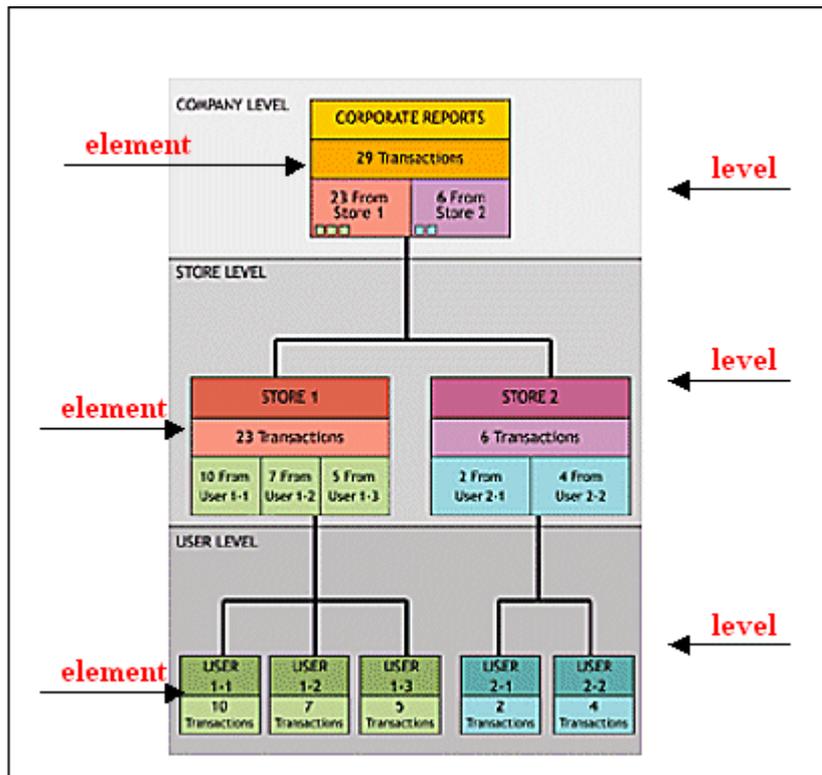
In order to use multi-store administration and reports, you will have to set up an organizational structure (or hierarchy) for your payment gateway stores. For information on setting up multi-store reports, see "Setting Up Multi-Store Reports".

There are two basic concepts to setting up a tree structure: Levels and Elements.

- Levels refer to a branch in the tree.
- Elements are single nodes or components on a branch in the tree.

When you set up your structure, first define the levels; then add elements to each level. Each element has its own multi-store user ID and password. You can see data for all stores below the element when you log in with that element user ID and password.

Example 1

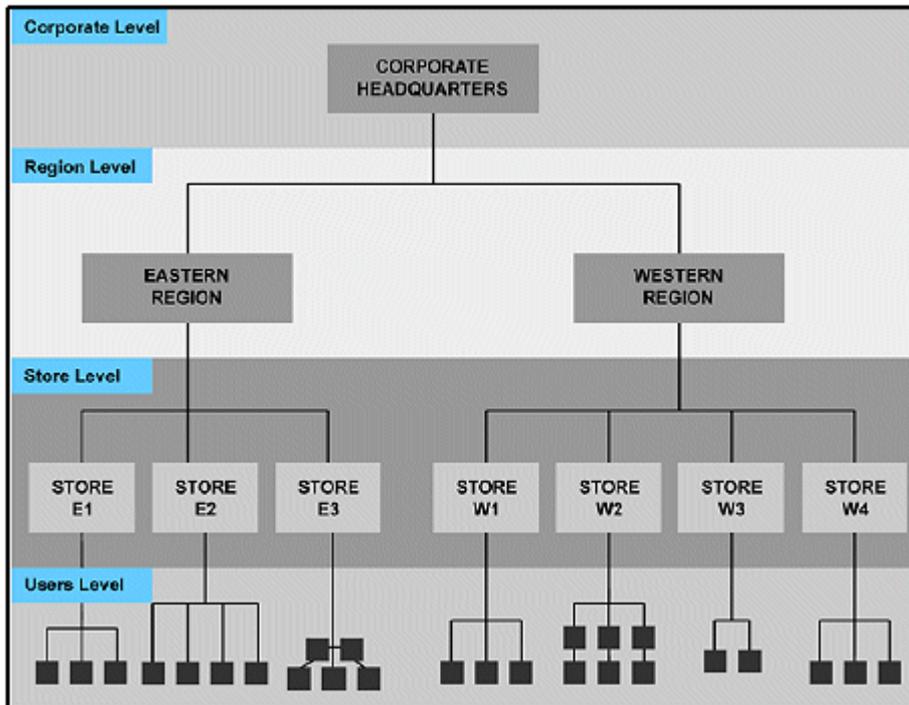


The levels and elements in a multi-store hierarchy.

For Example: You have two stores with 23 transactions for store #1 and 6 transactions for store #2. The top level would show 29 transactions total and the totals for each store.

The next level is the Store Level. If Store #1 had three employees taking orders and Store #2 had two employees taking orders, each Store report would show the breakdown of the number of transactions generated by each employee.

Example 2



Multi-store hierarchy.

From the above hierarchy, a user logging in for the Eastern region would see data for stores E1, E2, and E3. Logging in with the corporate headquarters user ID and password would allow you to see data for all stores including data for each region.

4.4.1 Setting Up Multi-Store Reports

4.4.1.1 Preparation

Before you begin setting up the multi-store hierarchy, you should know:

1. How many levels you want in your hierarchy. Draw a diagram of your organizational structure and determine how many levels you will need and what you want to name each level.
2. What elements you want at each level. For example, if you define a Region level, you might have an Eastern and a Western region.
3. Which stores you want to assign to each element. For example, you could assign three stores to the Eastern region and four stores to the Western region.
4. The store number and the store administrator's user ID and password for each store you add to the hierarchy. You will need to confirm the store administrator login information in order to add the store to the tree. It's a good idea to have your tree drawn out, with space to record the login ID and password for each element at each level of the tree.

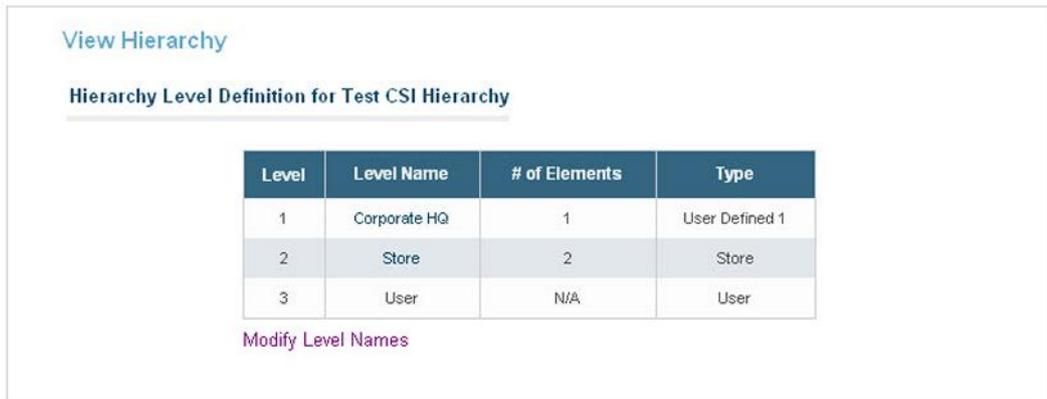
When you have drawn your diagram, you know how many levels and elements you need in your tree and where you want each to be. You have all the administrator logins for every store in the tree, and you should contact support to set up your initial multi-store administrator ID and password.

4.4.2 Setting Up Multi-Store Report Structure

4.4.2.1 Logging On

1. Click the **Administrator Login** link on the First Data Global Gateway Virtual Terminal login page.
2. Mouse over **Administration** in the **Main Menu Bar** and click **View Hierarchy** in the popup menu, or from the Administration section, click **View Hierarchy** on the **Side Menu Bar**.

The Hierarchy Level Definition page appears.



View Hierarchy

Hierarchy Level Definition for Test CSI Hierarchy

Level	Level Name	# of Elements	Type
1	Corporate HQ	1	User Defined 1
2	Store	2	Store
3	User	N/A	User

[Modify Level Names](#)

After you receive your initial multi-store administrator password, the hierarchy tree should contain only three levels: the top level, the Store level, and the User level. Until you create your own hierarchy, the **Modify Hierarchy Definition** link appears on the bottom of the Hierarchy Level Definition page.

4.4.2.2 Setting Up Levels

1. Click the **Modify Hierarchy Definition** link.
This link will only be visible prior to customizing your hierarchy. After you set up your hierarchy, you must delete everything in the hierarchy in order to set up a new hierarchy.

The Modify Hierarchy Level Definition page appears.

2. Only the top level will contain a name. To add levels to the tree, enter the name of the level into the fields provided. Work from the top down. Level names can include corporate, country, region, or division. Leave all fields empty you do not need.
3. Click the **Update Hierarchy** button at the bottom of the page.
The Hierarchy Level Definition page appears, showing all the levels you just entered.

4.4.2.3 Adding Elements to the Tree Structure

1. Click on the level name to view it.
A new page appears showing the current elements in the next level down.
2. Click the **Add** link to add an element to the level.
The Add Element page appears.
3. Enter a name for the element.
4. Enter a password for the element in the two fields provided.
5. Click the **Submit** button.
A page appears with the new element (region) in the list.

4.4.2.4 Adding Login Information

At the top of the page there is a login ID and password for the element.

1. Record the ID and password for the element.
2. Give the ID and password to those who require access to information at the level. They will be able to see only the information for the stores under that element in the tree.
3. Repeat the steps in "Adding an Element to the Tree Structure" as necessary to add other elements to the level.

When you reach the Store level, you will be prompted to enter the store's login information.

When prompted for this information, you should enter:

- The store number.
- The user ID for that store (the one issued when the store was initially set up).
- The current password for that store number and user ID.

4.5 Customizing Receipts

When you enter orders in the First Data Global Gateway Virtual Terminal, you have the option to show and print a receipt from the final transaction screen. You can print this receipt and give it to your customers as a sales receipt. Your own text appears at the top and the bottom of the receipt.

To customize your receipts, mouse over **Administration** in the **Main Menu Bar** and click **Receipt** in the popup menu, or from the Administration section, click **Receipt** on the **Side Menu Bar**.

4.5.1 Customizing Your Receipts

1. Choose the printer you use by clicking on the appropriate radio button in the **Printer Type** section at the top of this page. If you do not have a printer set up specifically for receipts, select **Normal**.
2. Enter your receipt header in the **Receipt Header** field. Enter up to 24 characters.
This text appears towards the top of your receipt.
3. Enter your receipt footer in the **Receipt Footer** field. Enter up to 24 characters.
This text appears at the bottom of your receipt.
4. Enter your return policy in the **Return Policy** field. Enter up to 100 characters.
5. Click the **SUBMIT** button.

If your change was successful, the following message appears at the top of the screen: "Your settings have been changed successfully!". If this message does not appear, you should click the **SUBMIT** button to try the change again.

Whenever you return to this screen, your current customized text should appear in the **Receipt Header**, **Receipt Footer**, and **Return Policy** fields.

4.6 Customizing Virtual Terminal Content

To customize fields shown on the Virtual Terminal page, mouse over **Administration** in the **Main Menu Bar** and click **Virtual Terminal Content** in the popup menu, or from the Administration section, click **Virtual Terminal Content** on the **Side Menu Bar**.

The First Data Global Gateway Virtual Terminal has many possible input fields that you can use when performing transactions. Not all fields are required. You can remove fields you do not use off your Virtual Terminal pages if they are not required by the payment gateway.

4.6.1 Choosing Content

To choose fields you want to appear on your Virtual Terminal pages, click the appropriate checkbox in the **Display Field** column. Click a checkbox to add a field if there is no check in the checkbox. Click a checkbox to remove a field if there is a check in the checkbox.

When you are finished making your selections, click the **SUBMIT** button on the bottom of the page. You should see a confirmation message at the top of the page if the change was successful.

When you want to restore the default settings, click the **Get Defaults** button at the bottom of the page; then click the **SUBMIT** button.

If you remove all the fields within a particular section, the entire section will be removed from your Virtual Terminal pages.

4.6.2 Changing Required Fields

You can change which fields are required on your Virtual Terminal page. For example, you require an email address for all your customers. You can make the **Email Address** field required by checking the appropriate box in the **Required Field** column. Make your selections; then click the **SUBMIT** button.

All fields related to Product Catalog items and Recurring Payments cannot be required.

4.6.3 Setting Defaults

You can set default values for your fields on the Virtual Terminal page. For example, if you consistently have sales of the same amount, you might want to set the default value of Total Amount to that specific amount. When you process an order with the First Data Global Gateway Virtual Terminal, the Total Amount will be populated with the default value.

Defaults can be numbers or letters, so you can enter names in the fields as well. Click the **SUBMIT** button after you set your default values. A confirmation message appears.

4.6.4 Turning Auto Calculation On/Off

The First Data Global Gateway Virtual Terminal can calculate the subtotal and total amount for products selected for an order.

When you are processing an order with this feature enabled, you can select products from your product catalog and enter values for tax and shipping charges. The Subtotal and Total Amount fields can be calculated for you.

If you have chosen a default value for the Total Amount, the auto-calculation feature will override the default total amount.

To enable the auto-calculation feature, select the **Yes** radio button in the Auto calculate Sub-Total & Total Fields section. To turn this feature off, select the **No** radio button.

4.6.5 Tax Percentage

On the Virtual Terminal page, you can enter the sales tax percentage instead of the amount of sales tax to add. Select **Percentage** in the Default column for the Tax field in the Other Fields section. You may also enter a default sales tax percentage value in the **Default** column. Selecting **Exempt?** sets a default tax rate of zero.

5 Support

Use the Support section to find help and support about the First Data Global Gateway Virtual Terminal.

The Support section contains links to the:

- Product manuals
- Frequently asked questions (FAQ)
- Support hotline and email
- Online Support Form
- Download Center

The Online Support Form and Download Center are part of the First Data Global Gateway Virtual Terminal application, but the product manuals and FAQs are on First Data web sites that are not part of the First Data Global Gateway Virtual Terminal application.

There are two ways to reach the manuals and FAQs:

- Use the **Main Menu Bar** or **Side Menu Bar** to link to a general support page where you can find the manual or FAQ for a particular product.
- Click **Support** on the **Main Menu Bar** and use the buttons on the main Support page to link directly to the manual or FAQ page.

The following sections give more details.

5.1 General Support

To access the First Data support page where you can find all support material for a particular product, mouse over **Support** in the **Main Menu Bar** and click **Virtual Terminal Support**, **Connect Support**, or **Global Gateway API Support** in the popup menu, or from the Support section, click the corresponding item on the **Side Menu Bar**.

Note: This takes you to a First Data web site that is not part of the First Data Global Gateway Virtual Terminal application.

5.2 Manuals

Click **Support** on the **Main Menu Bar** to open the main Support page; then click one of the **PDF Manual** buttons to access the First Data Support web site containing links to PDF manuals for all products.

Note: The page with the PDF links is a First Data web site that is not part of the First Data Global Gateway Virtual Terminal application.

The Virtual Terminal Support manual will be the most helpful for issues related to managing your account and accepting payments using the First Data Global Gateway Virtual Terminal application.

5.3 FAQ

Click **Support** on the **Main Menu Bar** to open the main Support page; then click one of the **FAQ** buttons to access the First Data Support web site containing links to FAQs for all products.

Note: The page with the FAQ links is a First Data web site that is not part of the First Data Global Gateway Virtual Terminal application.

5.4 Online Support Form

To open the online support form, mouse over **Support** on the **Main Menu Bar** and click **Online Support Form**, or from the Support section, click **Online Support Form** on the **Side Menu Bar**. Fill out the form and submit it. When you submit the form, an email is sent to the support department.

5.5 Download Center

To open the Download Center, mouse over **Support** on the **Main Menu Bar** and click **Download Center** on the popup menu, or from the Support section, click **Download Center** on the **Side Menu Bar**. The download center lets you download useful files, such as a store PEM file.

5.6 Contact Information

If you have read the documentation and cannot find the answer to your question, you can contact Support at 1800 625 171. You can find this information in the Virtual Terminal information menu on the right side of the Support main page.

Glossary

ACH

ACH is an abbreviation for Automated Clearing House. Automated Clearing House (ACH) is the name of an electronic network for financial transactions in the United States. ACH processes large volumes of both credit and debit transactions which are originated in batches. ACH allows merchants to accept payments from a customer's checking or savings account.

Acquiring Bank

An acquiring bank is a bank which provides a service to its business customers allowing them to accept card payments for goods and services.

Address Verification System

The Address Verification System (AVS) is a system used to verify the identity of the person claiming to own the credit card. The system will check the billing address of the credit card provided by the user with the address on file at the credit card company. The gateway provides an AVS code in each approved transaction result that tells you how well the two addresses match. If they match, there is a lower probability of fraud. If there is a discrepancy in either the address or zip code, the probability of fraud is higher. Merchants can use AVS codes to help protect themselves from chargebacks and fraud.

Antivirus Software

Antivirus software consists of computer programs that attempt to identify, deter, and eliminate computer viruses and other malicious software. Antivirus software typically uses two different techniques to accomplish this: Examining (scanning) files to look for known viruses matching definitions in a virus dictionary. Identifying suspicious behavior from any computer program which might indicate infection. Such analysis may include data captures, port monitoring, and other methods. Because of the risk of computer viruses doing harm to your computer files, antivirus software is recommended for all Internet users.

Application Programming Interface (API)

First Data Global Gateway API is a tool that allows a merchant to create a customer commerce solution. Our application programming interface (API) allows you to add payment functionality to custom built web sites or online applications.

Authorization

Performing an authorization reserves funds on a customer's credit card. An authorization does not charge the card until you perform a Ticket Only transaction or confirm shipment of the order. The period during which funds are reserved may be as little as three days or as long as several months.

Authorize Only

An Authorize Only transaction reserves funds on a customer's credit card. An Authorize Only transaction does not charge the card until you perform a Ticket Only transaction and confirm shipment of the order using an option available in the Reports section. Authorize-only transactions reserve funds for varying periods, depending on the issuing credit card company's policy. The period may be as little as three days or as long as several months. For your protection, you should confirm shipment as soon as possible after authorization.

Batch

A group of credit card or check transactions that are submitted together to the payment gateway for settlement. On the payment gateway, batches are submitted automatically once a day.

Blocking and Limiting

If you suspect certain transactions might be fraudulent, you can block further purchases by blocking credit card numbers, persons' names, domain names,

and IP addresses or Class C addresses from purchasing at your store. You can limit the amount that any customer can spend at your store by setting a maximum purchase amount. You can set how long automatic lockouts and duplicate lockouts will continue to be blocked.

Browser

Short for web browser, a browser is a software application that enables a user to display and interact with text, images, videos, music, and other information typically located on a web page at a web site on the Internet.

Cable Modem

A cable modem is a type of modem that provides access to the Internet through the cable television infrastructure. Cable modems are primarily used to deliver broadband Internet access, taking advantage of unused bandwidth on a cable television network. If the cable network is shared with many other Internet subscribers, Internet access speed may go down.

Card Code

The card code is the card security code, sometimes called Card Verification Value or Code (CVV or CVC). It is a security feature for credit or debit card transactions, giving increased protection against credit card fraud. This code (also known as a CCID or Credit Card ID) is often asked for by merchants to secure transactions when the card is not present, usually occurring over the Internet, by mail, fax, or over the phone. The payment gateway will compare the card code with the code on file at the card-issuing bank. Results of this comparison will show in the transaction approval code. By using the card code results along with the Address Verification Service (AVS), you can make more informed decisions about whether to accept transactions. MasterCard, Visa, and Discover credit and debit cards have a three-digit code, called the "CVC2" (card validation code), "CVV2" (card verification value), and "CID" (card identification number), respectively. It is always the final group of numbers printed on the back signature panel of the card. New North American MasterCard and Visa cards feature the card code in a separate panel to the right of the signature strip. American Express cards have a four-digit code printed on the front side of the card above the number, referred to as the CID.

Card-Issuing Bank

The financial institution or bank that issues a credit, debit, or purchasing card to a business or consumer. The card-issuing bank has an address on file for the card which the Address Verification System (AVS) compares to the address given to the merchant.

Chargeback

A chargeback is a forced refund to the customer through your bank account. Chargebacks can occur with any type of business whether it is online or at an actual store location. Each fraudulent credit card transaction typically results in a chargeback. Credit card associations penalize merchant banks for chargebacks. Naturally, the bank passes the fines on to the responsible merchant, and these penalties can be severe. While consumers are provided with a certain degree of protection if their credit card numbers are stolen and misused, Internet merchants are fully liable for all transactions because Internet transactions are classified as "card-not-present."

Commerce Service Provider (CSP)

The commerce service provider (CSP) supplies businesses with the tools and services they need to buy and sell products and services over the Internet, and to manage their online enterprises. CSPs can generally host a secure web site that could be connected to a secure payment gateway for selling products or services over the Internet.

Credit

A Credit transaction returns funds to a customer's credit card on orders without an order number. This transaction is intended for returns against orders processed outside the system. Credit transactions are marked as Returns in your reports.

Credit Card

A credit card is a card (usually plastic) that assures a seller that the person using it has a satisfactory credit rating, and that the issuer will see to it that the seller receives payment for the merchandise delivered.

CVC2

The CVC2 is the card validation code or card code for MasterCard. See the definition for card codes for more information.

CVV2

The CVC2 is the card verification value or card code for Visa cards. See the definition for card codes for more information.

Data Field

A data field is an area on a web form or software application where you can enter information relevant to the name of the field. For example, you would enter the zip code in the data field named zip code.

Dial-Up Connection

A dial-up connection is a way to access the Internet through a telephone line. A modem is connected to a computer and a telephone line to dial into an Internet service provider's (ISP) node to establish a modem-to-modem link, which is then routed to the Internet. The speed of dial up connections is usually slower than other Internet access options.

Digital Certificate

A digital certificate is an electronic certificate that establishes the merchant's credentials for performing business on the Internet. It is an encrypted set of information issued by an Internet certification authority such as Thawte. Digital certificates are required for merchants who choose to use the API. For other products, the merchant does not need a digital certificate.

Domain Name

A name that identifies a computer or computers on the internet. These names appear as a component of a web site's URL, such as microsoft.com. This type of domain name is also called a hostname.

DSL

DSL (Digital Subscriber Line) is a technology for bringing fast Internet service to homes and small businesses over the wires of a local telephone network.

E-commerce (ECI)

E-commerce (ECI) or electronic commerce consists of the buying and selling of products or services over electronic systems, such as the Internet and other computer networks.

Field

A field is an area on a web form or software application where you can enter information relevant to the name of the field. For example, you would enter the zip code in the field named zip code.

Firewall

A firewall is a hardware or software device which is configured to permit, deny, or proxy data through a computer network which has different levels of trust. A firewall protects the resources of a private network from users of other networks.

Forced Ticket

A Forced Ticket transaction is a credit card transaction for authorizations you obtained over the phone. It requires a reference number (or approval code) that you should have received when you made the phone authorization.

Hierarchy

A term used to describe the organizational tree structure for multi-store reports. Merchants describe their organization by defining an org chart in the form of a tree structure. The structure is used for combining store reports into groups at different levels. The term hierarchy refers to the entire organizational tree structure containing levels and elements.

HTML

HTML is short for HyperText Markup Language. HTML is a markup language used to structure text and multimedia documents and to set up hypertext links between documents used extensively on the Internet. Other than manually entering transactions using the virtual POS terminal, HTML is the simplest way to send payment transactions to the payment gateway.

HTTP

HTTP (Hypertext Transfer Protocol) is a communications protocol used to transfer or convey information on the Internet. For example, when you enter a URL in your browser, it sends an HTTP command to the web server directing it to receive and transmit the requested web page.

Hyperlink

A hyperlink is a reference or navigation element in a document or web page linking to another section of the same document or web page or to another document or web page that may be on a different web site.

Internet Service Provider (ISP)

An Internet service provider (ISP) is a business or organization that provides consumers or businesses access to the Internet and related services. An ISP can also host a web site.

IP Address

IP address is short for Internet Protocol address. An IP address is a number that is used to identify a specific computer on a network or on the Internet. The format of an IP address is written as four numbers separated by periods. Each number can be from 0 to 255. For example, 1.160.10.240 could be an IP address.

Issuing Bank

The financial institution or bank that issues a credit, debit, or purchasing card to a business or consumer. The issuing bank has an address on file for the card which the Address Verification System (AVS) compares to the address given to the merchant.

Level

A level is a single tier in the hierarchy or organizational tree structure for multi-store users. The top level (1) is typically the root (or corporate) level containing 1 element. The lowest level of the tree is always the User level; the next level up from the lowest is the Store level. Merchants define the number of levels and names of each level for their own organization up to 10 total levels.

Local Area Network (LAN)

A local area network (LAN) is a computer network covering a small geographic area, like a home, office, or group of buildings. The defining characteristics of LANs, in contrast to Wide Area Networks (WANs), include their much higher data transfer rates, smaller geographic range, and lack of a need for leased telecommunication lines.

Log In

To log in is the process by which individual access to a computer system is controlled by identification of the user in order to obtain credentials to permit access. It is an integral part of computer security. A user can log in to a system to obtain access, and then log out when the access is no longer needed.

Log Off

To log off (also: to log out, sign out, or sign off) is to close off one's access to a computer system after previously having logged in. To log out of the system, click the Logout link in the top right corner of the application. To prevent unauthorized users from accessing their account, merchants should always log off and close the browser window when they are finished using the system.

Multi-Store

Multi-stores are multiple accounts with different store numbers.

Network

A network is a group of two or more computer systems linked together.

Password

A password is a form of secret authentication data that is used to control access to a resource. It is recommended that users change their password frequently and do not share it with anyone to prevent unauthorized access to their accounts.

Payment Gateway

A payment gateway is an e-commerce application service that authorizes payments for e-businesses and online retailers. It is the equivalent of a physical POS (Point-of-sale) terminal located in most retail outlets. Payment gateways encrypt sensitive information, such as credit card numbers, to ensure that information passes securely between the customer and the merchant.

PDF File

PDF is short for Portable Document Format. It is the file format created by Adobe Systems in 1993 for document exchange. PDF is used for representing two-dimensional documents in a device-independent and display resolution-independent fixed-layout document format. Internet users need an Adobe Acrobat viewer to open a PDF file, which can be downloaded for free at <http://www.adobe.com>.

Plug-In

A plug-in is a hardware or software module that adds a specific feature or service to a larger system. For example, there are a number of plug-ins for the Mozilla Firefox browser that enable it to display different types of audio or video files.

Point of Sale (POS)

Point of Sale (POS) is when the consumer is purchasing a product from the merchant and the merchant is processing the payment transaction. POS is commonly used to refer to the payment terminals or software merchants use to process the payment transaction.

Protocol

A Protocol is a set of guidelines or rules that help in governing an operation on the Internet and communications over it. There are several different protocols. HTTP is the protocol used for the Internet.

Return

A Return transaction returns funds to a customer's credit card for an existing order on the system. To perform a return, you need the order number (which you can find in your reports). After you perform a Return for the full order amount, the order will appear in your reports with a transaction amount of 0.00.

Sale

A sale transaction immediately charges a customer's credit card when the batch of transactions is closed.

Secure Shell (SSH)

Secure Shell (SSH) is a network protocol that allows data to be exchanged over a secure channel between two computers.

Secure Sockets Layer (SSL)

Secure Sockets Layer (SSL) are cryptographic protocols that provide secure communications on the Internet, such as transmitting credit card data and other data transfers.

Settlement

Settlement is the completion of a payment transaction. When a transaction is settled, it has been funded and the funds deposited in the merchant account.

Store Name

The store name (also called storename or store number) is a six to ten-digit number needed to identify the merchant. The store name is given to the merchant in the Welcome E-mail. Merchants need the store name, user ID, and password to access the Virtual POS Terminal, as well as reports, admin, and customization functions. The store name is also needed for using the API and other products.

Ticket Only

A Ticket Only transaction is a post-authorization transaction that captures funds from an Authorize Only transaction. Funds are transferred when your batch of transactions is settled. If you enter a larger total for the Ticket Only transaction than was specified for the Authorize Only transaction, the Ticket Only transaction may be blocked. If you enter a smaller amount than was authorized, an adjustment is made to the Authorization to reserve only the smaller amount of funds on the customer's card for the transaction.

Transit Routing Number

A transit routing number is a nine-digit bank code, used in the United States, which appears on the bottom of checks. This code is used by the Automated Clearing House to process direct deposits and other automated transfers.

URL

URL is short for Uniform Resource Locator. The URL is the address for documents and other pages on the Internet. The first part of the address indicates what protocol to use, and the second part specifies the IP address or the domain name where the resource is located.

User ID

For accounts with multiple users, each individual user will be assigned a User ID. The user will need this User ID, along with the store name and password, to log in to the system.

Virtual

Virtual is often used on the Internet to denote a web-based program that functions similarly to a physical device or system. For example, a virtual point-of-sale terminal is a computer program that performs the same functions as a physical point-of-sale terminal.

Void

To void a transaction is to cancel a payment transaction. Merchants can void transactions prior to settlement. Once the transaction has settled, the merchant has to perform a return or credit to reverse the charges and credit the customer's card.

WAN

A WAN is a wide-area computer network that spans a relatively large geographical area. Typically, a WAN consists of two or more local-area networks (LANs). Computers connected to a wide-area network are often connected through public networks, such as the telephone system. They can also be connected through leased lines or satellites.

Web Server

A web server is a computer program responsible for accepting HTTP requests from clients and serving HTTP responses along with optional data contents. The

responses are usually web pages, such as HTML documents and linked objects (images, etc.).

XML

XML is the Extensible Markup Language, which is a universal format for the representation of documents and data. It is classified as an extensible language because it allows its users to define their own tags. Its primary purpose is to facilitate the sharing of structured data across different information systems, particularly through the Internet.



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