

How To

Quick Reference Guide



SwipeSimple



Log in to Swipesimple.com

- ❖ Type swipesimple.com in your web browser and go to the site
- ❖ Click the Log in button on the top right of the page
- ❖ Use the information provided in the email to log in
- ❖ You will be prompted to change your password
- ❖ Put in your email address that's on file with us
- ❖ Talus will provide you with your temporary password
- ❖ Change your password and go to the Virtual Terminal
- ❖ Your password requires at least 8 characters with both letters and number
- ❖ Enter your password twice
- ❖ This will get you into your Virtual Terminal and your Dashboard for reporting

How to Process a Credit/Debit card transaction on a Virtual Terminal

- ❖ From the Dashboard, click on the top left tab for Virtual Terminal
- ❖ To create a new transaction, put in the cardholder information or use a customer on file
- ❖ Here, you can add items, discounts, and add tax to charge the card
- ❖ Go to the virtual terminal page it should say new transaction
- ❖ Enter credit card number
- ❖ Enter credit card expiration date
- ❖ Scroll down to the amount field
- ❖ Enter the transaction amount
- ❖ You will see the transaction processing and a pop-up that says, "Approved"

Print Receipt

- ❖ Tap on print receipt to review the printable receipt or the Email
- ❖ You will see another tab pop up in your browser with the receipt or it may open a print preview screen

Void (Only Pre-Batch CREDIT Transactions Can be Voided)

- ❖ Click Transactions on the far-left menu
- ❖ Click the **Transaction number** on the transaction
- ❖ You will see the Void and Refund buttons in red on the top right
- ❖ Click void
- ❖ **Note* Void on the same day as the transaction**

Refund (After Settlement/for Debit)

- ❖ Click Transactions on the far-left menu
- ❖ Click the **Transaction number** on the transaction
- ❖ You will see the Refund and Void buttons in red on the top right
- ❖ Click refund
- ❖ **Note* Refund any day after the transaction has been settled**

To View Batches or Authorizations

- ❖ Go to Dashboard in the Merchant Portal
- ❖ Click on the tabs for **Batches** or **Authorizations**

To Search for a Transaction

- ❖ Click on the **"Find a Transaction"** tab
- ❖ Under the **Authorization** tab select the transaction by **Auth code** or **Card number** (last 4) under the Authorization tab

Thank You
for being a valued customer!



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