

# How To

## Quick Reference Guide



**Authorize.net**



### Log in to Authorize.net

- ❖ Your login and temporary password will be in an email from [no-reply@authorize.net](mailto:no-reply@authorize.net)
- ❖ Create your new password
- ❖ You will receive a 2nd email with a PIN to verify your account
- ❖ In 2nd email, click on the link to your account
- ❖ Use the information provided in the email to log in

### How to Process a Credit/Debit Card Transaction on a Virtual Terminal

- ❖ Click the Virtual Terminal
- ❖ Select Charge
- ❖ Select transaction type (authorize and/or capture)
- ❖ Complete payment authorization information form
- ❖ Scroll down to bottom of page
- ❖ Click the Submit button

### Void (Only Pre-Batch CREDIT transactions can be voided)

- ❖ **Note\*** Void on the same day as the transaction
- ❖ Click on the "Transaction Search" tab
- ❖ Select Unsettled transactions
- ❖ Locate the transaction that you want to void
- ❖ Click on Transaction ID
- ❖ Select Void
- ❖ Click ok

### Refund (after settlement/for Debit)

- ❖ **Note\*** Refund any day after the transaction has been settled
- ❖ Click on the "Transaction Search" tab
- ❖ Select Search "By Business Day"
- ❖ Locate the transaction that you want to refund
- ❖ Click on Transaction ID
- ❖ Select Refund
- ❖ Click ok

### 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 "Transaction Search" tab in **Authorization.net**
- ❖ select the transaction type by Business Day, Unsettled Transactions, or Suspicious Transactions

### Print Receipt

- ❖ **Note\*** A printer must be set up with the virtual terminal to print paper receipt
- ❖ Tap on the print view receipt to review the printable receipt

# Thank You

for being a valued customer!



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