

How To

Quick Reference Guide



Fluid Pay

Log in to Fluidpay.com

- ❖ Click on the link to your account that was sent to you via email
- ❖ Use the information provided in the email to log in
- ❖ You will be prompted to change your password

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

- ❖ Click the Virtual Terminal
- ❖ Click on the card or the ach in the Middle of the screen
- ❖ Choose the payment screen: Credit Card or ACH transaction
- ❖ **The fields that have an asterisk to the right of the field are required**
- ❖ Enter the credit card number in the card number field
- ❖ Enter in the expiration date
- ❖ Put in the transaction amount
- ❖ Click the Submit button

How to Process an ACH sale on a Virtual Terminal

- ❖ Manually enter both the Account number and the Routing Number
- ❖ Enter the **Account Number** and the **Routing number**
- ❖ **Note*The minimum amount of information required is marked with an asterisk**
- ❖ In the transaction field, put in the transaction **amount**
- ❖ Click the **Submit button**

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

- ❖ Click on the Reporting on the left menu
- ❖ Choose transactions
- ❖ Click on the "Filter search options" and choose the criteria to use (IE: **Transaction ID** or **Card number** (last 4))
- ❖ Define created date range and press search
- ❖ Click on the 3 dots to the left of the transaction you are wanting to void
- ❖ Click View transaction

- ❖ Click Void Transaction on the view transaction page
- ❖ Verify you want to process the void
- ❖ Note* Void on the same day as the transaction and refund any day after the transaction has been settled

Refund (After Settlement/for Debit)

- ❖ Click on the Reporting on the left menu
- ❖ Choose transactions
- ❖ Click on the "Filter search options" and choose the criteria to use (IE: **Transaction ID** or **Card number** (last 4))
- ❖ Define created date range and press search
- ❖ Click on the 3 dots to the left of the transaction you are wanting to REFUND
- ❖ Click View transaction
- ❖ Click Refund Transaction on the view transaction page
- ❖ Verify you want to process the Refund
- ❖ Note* Refund any day after the transaction has been settled and Void on the same day as the transaction

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

Print Receipt

- ❖ Tap on the print view receipt to review the printable receipt or the Email

Thank You
for being a valued customer!



800-787-4105

support@taluspay.com

taluspay.com