

How To

Quick Reference Guide



USAePay



Log in to usaepay.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

- ❖ On the menu to the left you will see "Transactions"
- ❖ Click on "Transactions" and select "Simple Charge"
- ❖ This is where you navigate to process payments as a Virtual terminal

Voids and Refunds: Remember

- ❖ You can void on the same day as the transaction
- ❖ You can refund any day after it has been settled
- ❖ The system is set to automatically settle daily at 11pm
- ❖ To find batch time: Look under the Settings/General menu on the left side and then the batch tab at the top for the batch time)

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

- ❖ Click on the reports option on the left menu
- ❖ Click on transaction list
- ❖ Locate your transaction
- ❖ On the right side of the screen you will see the option to void
- ❖ 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 (only after transaction has settled)

- ❖ Click on the reports option on the left menu
- ❖ Click on transaction list
- ❖ Locate your transaction
- ❖ On the right side of the screen, you will see the option to refund

- ❖ 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

- ❖ On the lower left section of the menu, you will see settings
- ❖ Click on settings to open a sub menu
- ❖ Choose general. This opens a page with tabs at the top
- ❖ Click the Tab labeled batches
- ❖ This is where you can adjust the auto batch time
- ❖ This is where your batch reports and/or batch error report emails will go
- ❖ **Please Note** - do not adjust the **expire auth** time tab. It should remain at 24 hours for PCI Compliance regulations
- ❖ **Please note** - Changing the batch time can affect when you receive your deposits

To update the email that is shown on the receipts you send to your customers

- ❖ In Settings, click on the "Receipts" tab at the top

To add users to your gateway

- ❖ Go back to the left menu and click on users
- ❖ Click on the blue +add new user in the top right corner
- ❖ This will create a pop-up menu for you to add another user

Thank You

for being a valued customer!



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