Allegiance
MERCHANT SERVICES

Authorize.Net Merchant User Guide

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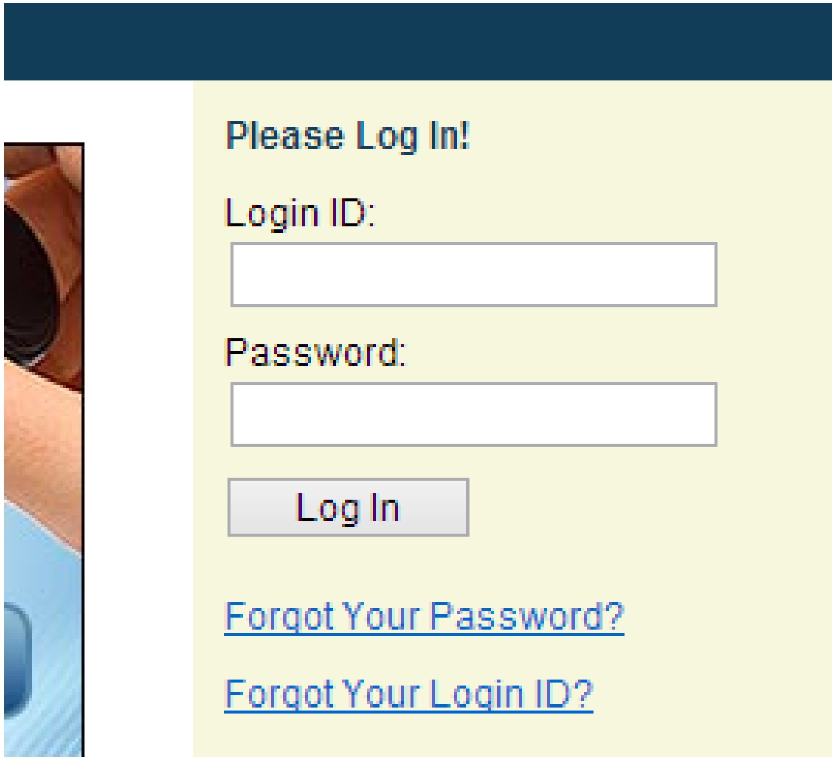
Log In/Set Up

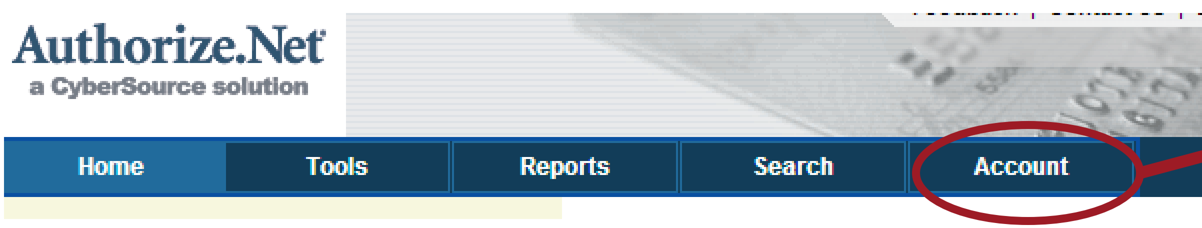
- Save this link to your favorites:
  - **https://account.authorize.net**

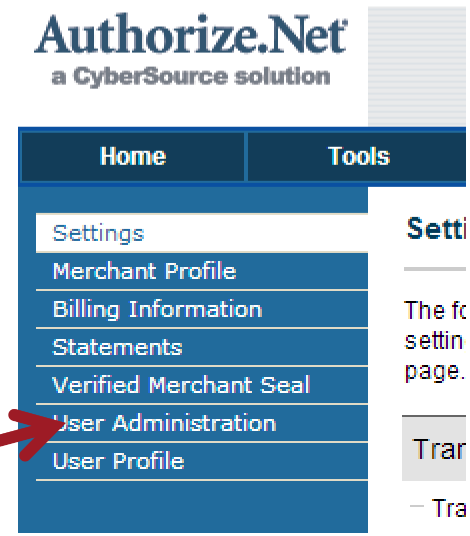
- Click the link and enter log in credentials.
- Password will be emailed to you.

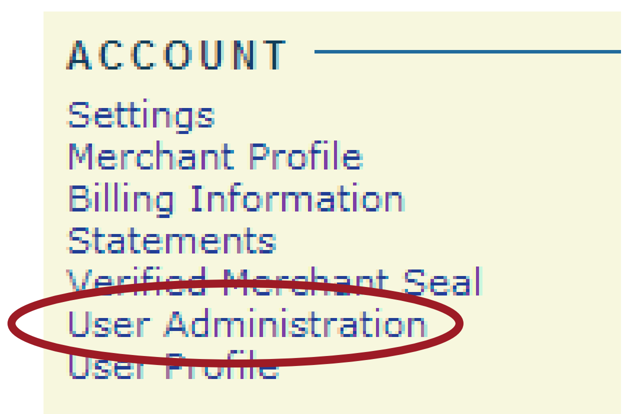


Adding Users

- Click Account tab (listed at top or screen)
  - Then Click User Administration



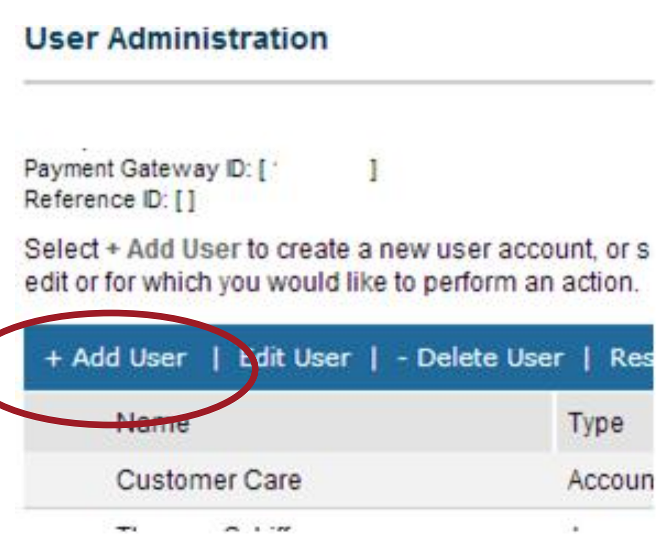


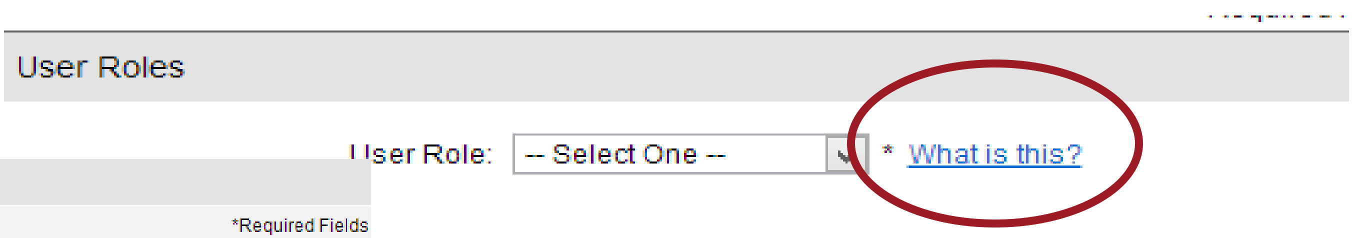


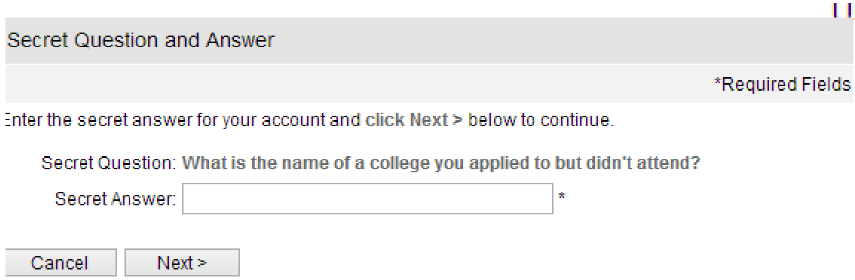
- Or Click User Administration in the Account Section from the left side of the screen

Adding Users

- Click + Add User
  - You can also edit/delete users from this section
- Select User Role
  - Click “What is this?” to see of list of roles
- Answer “Secret Question” and Follow Prompts

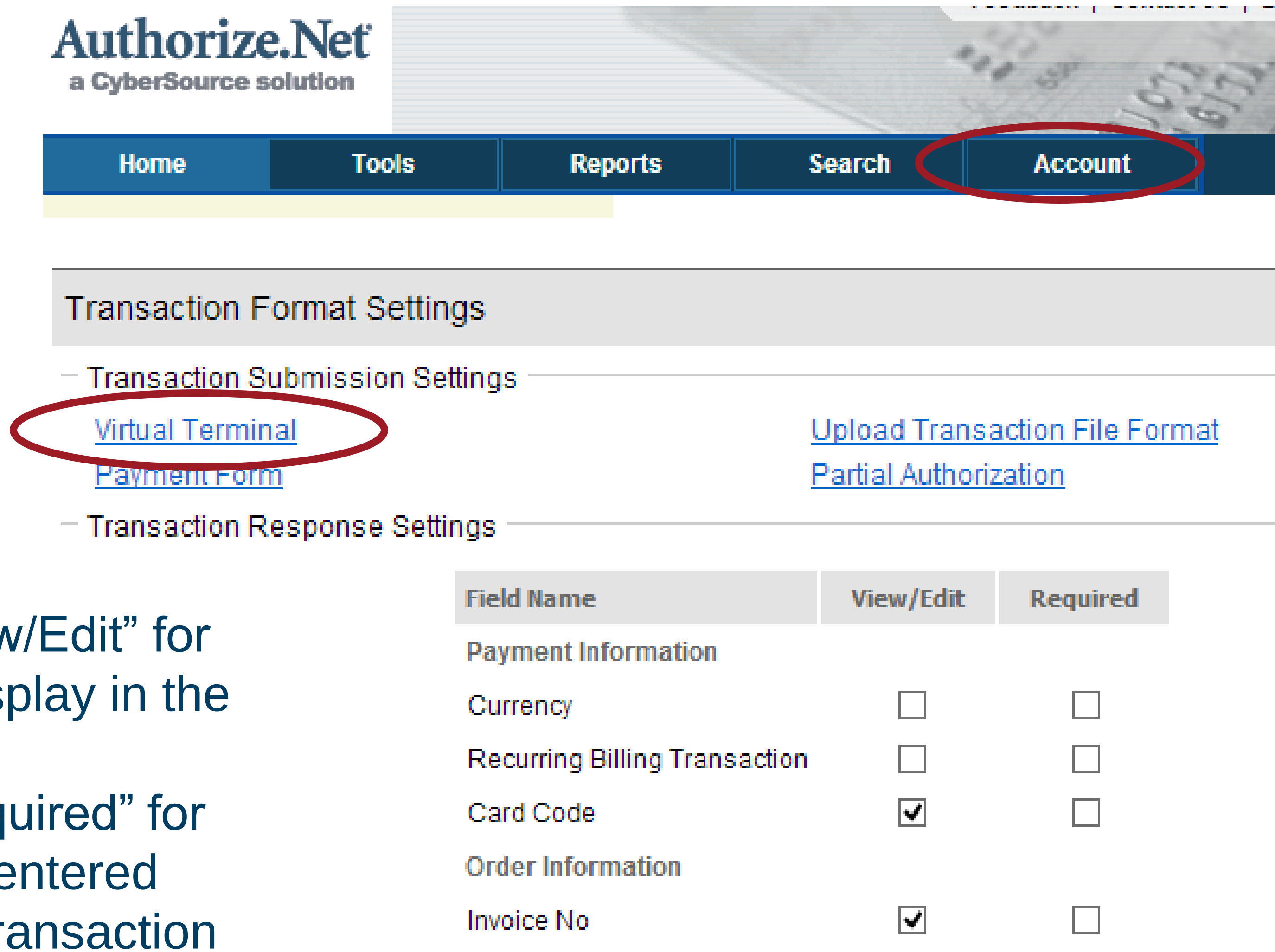






Setting up Payment Form

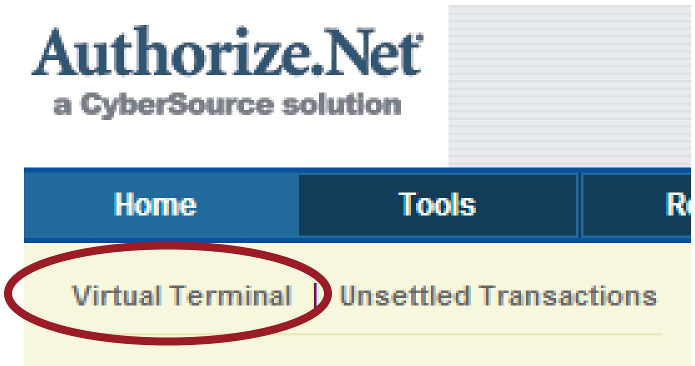
- Click Account Tab
- Click Virtual Terminal



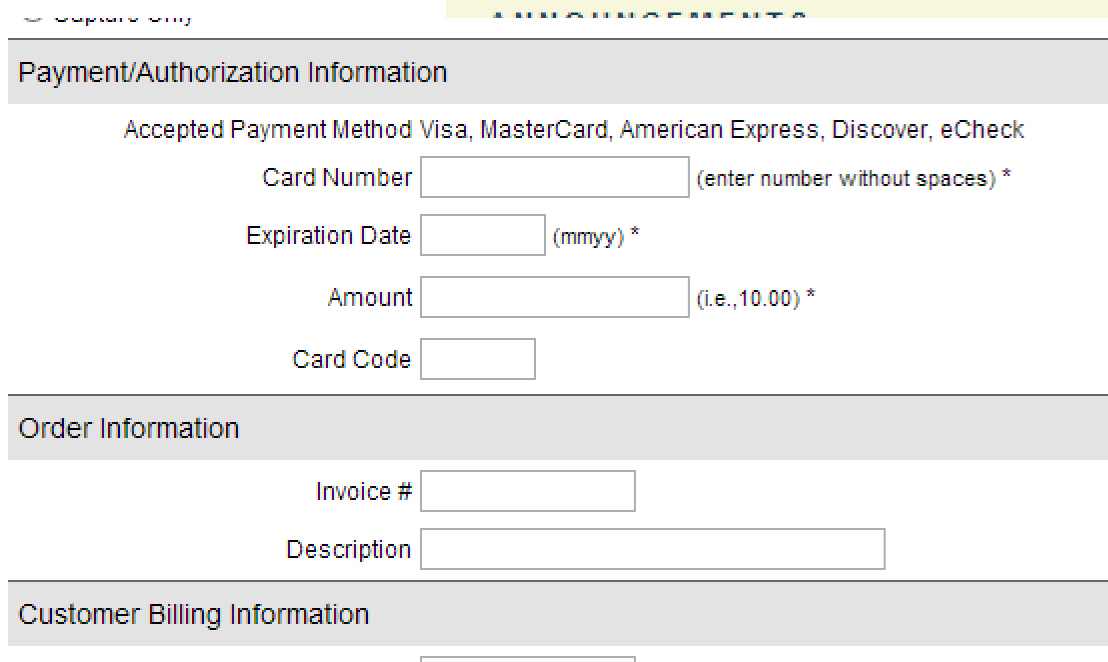
- Check Box by "View/Edit" for Items you want to display in the Virtual Terminal
- Check Box by "Required" for items that MUST be entered before submitting a transaction

Processing a Sale

- Click Virtual Terminal from the Home Screen

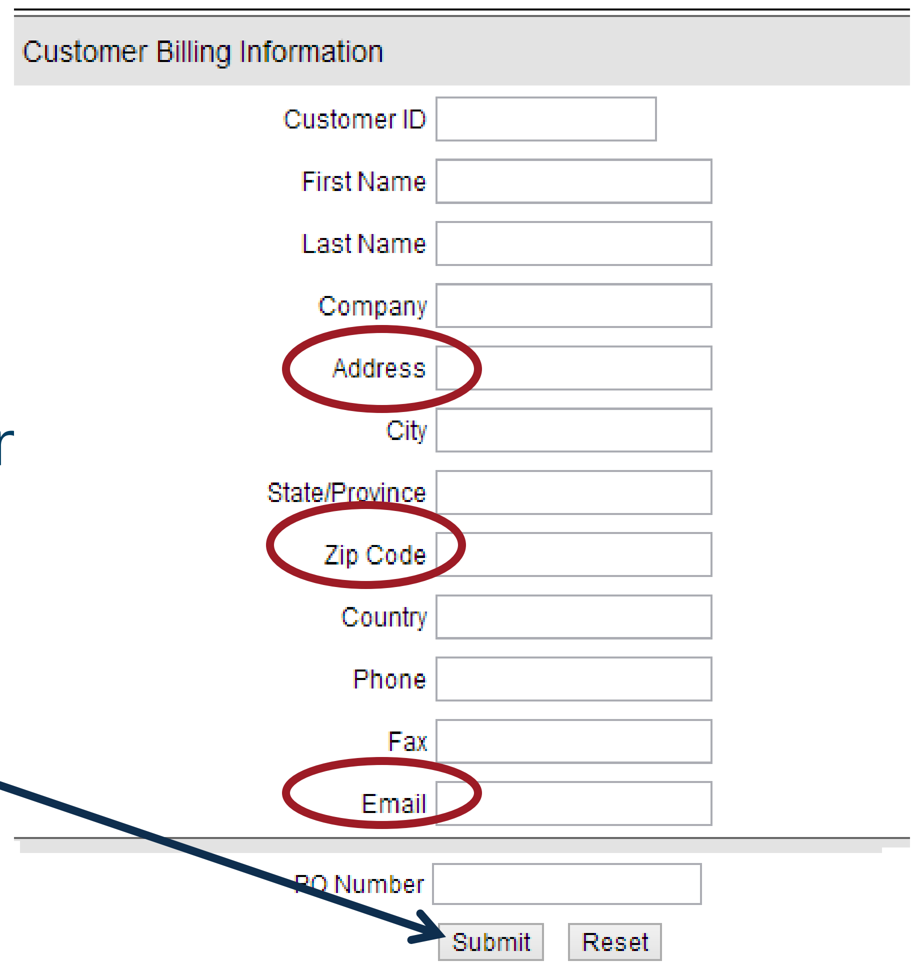


- Complete Fields, then Scroll Down and Hit Submit
- Card Number and Expiration Date are Required



Processing a Sale

- Enter Address and Zip Code to ensure lowest processing rate
- Enter Email address and your customer will receive ar email receipt
- Click Submit
  - The next screen will advise if transaction is approved or declined



Customer Billing Information

Customer ID

First Name

Last Name

Company

Address

City

State/Province

Zip Code

Country

Phone

Fax

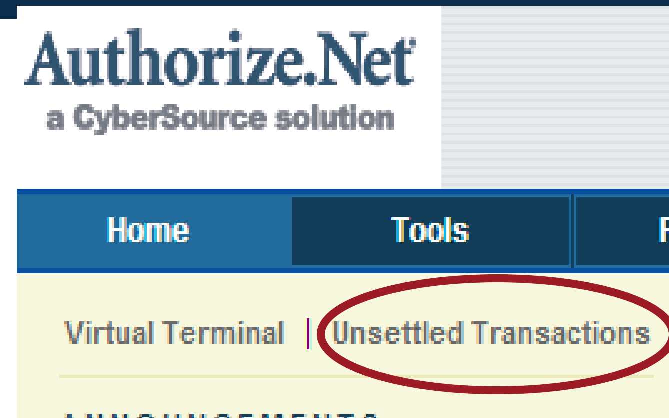
Email

PO Number

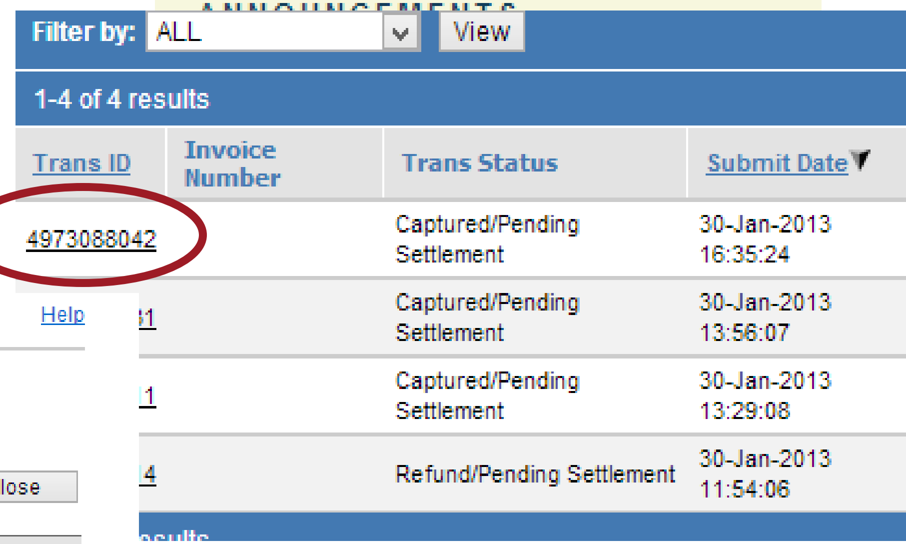
Submit Reset

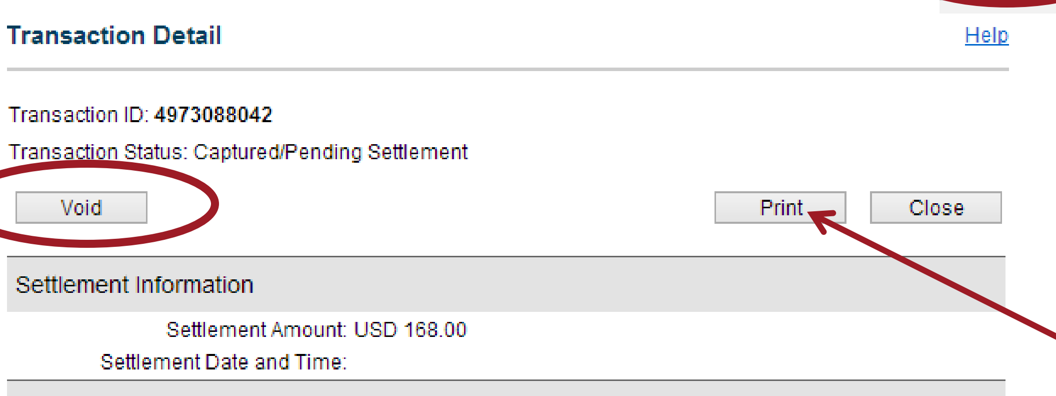
Processing a Void

- Click Unsettled Transactions from the Home Screen



- Click the Transaction ID of the transaction you need to void
- Click Void

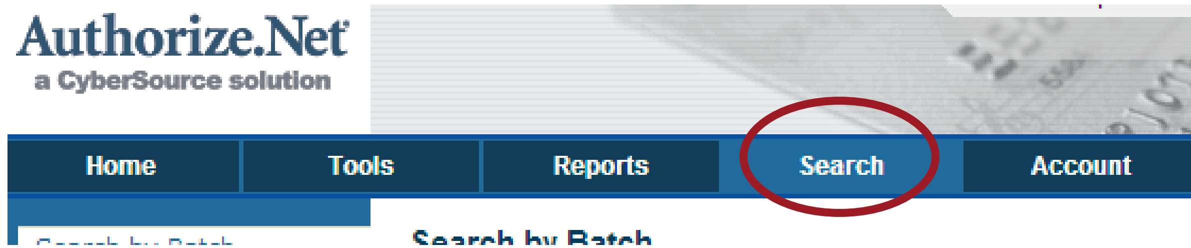


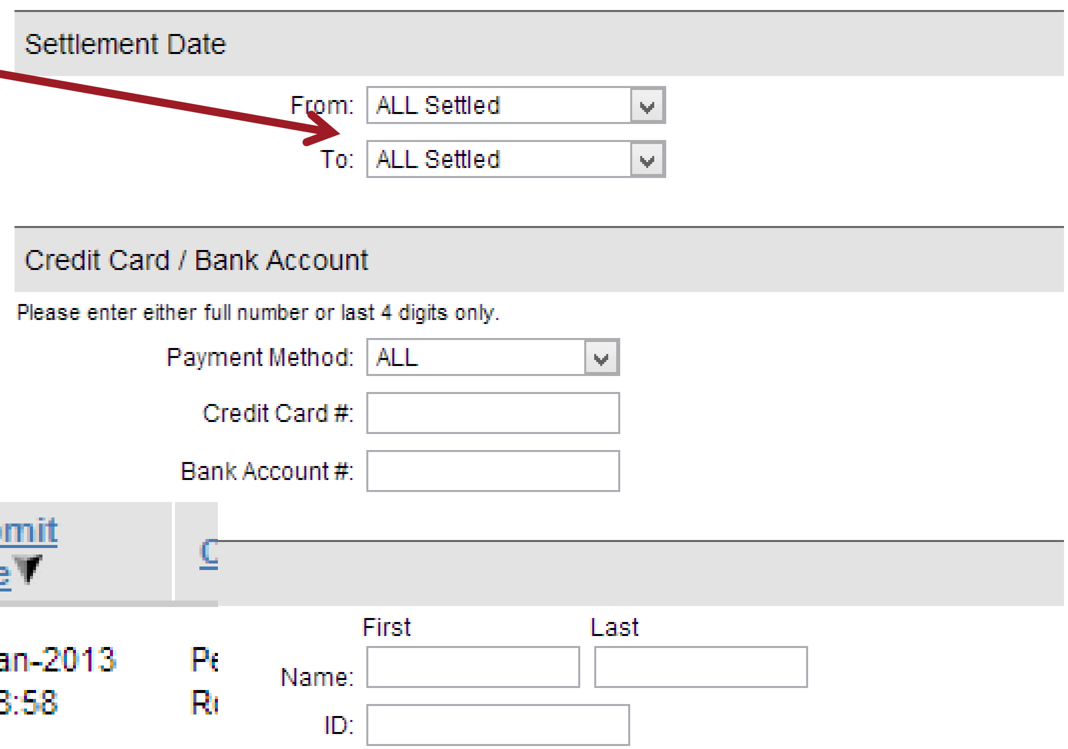


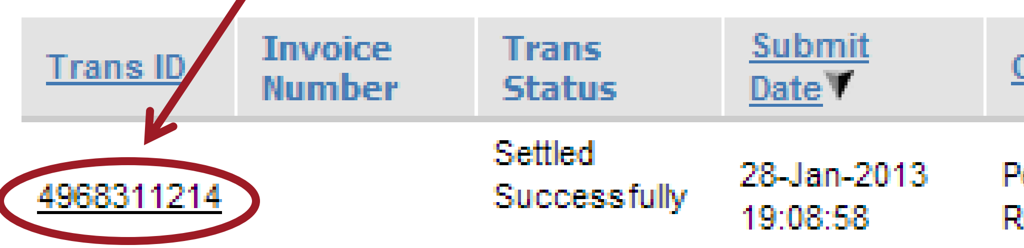
Note: You can also reprint the receipt from the screen

Processing a Refund

- Click Search Tab
  - Enter the Date Range
  - Enter Your Search Criteria
  - Click Search (at the bottom of screen)
  - Click on the Trans ID

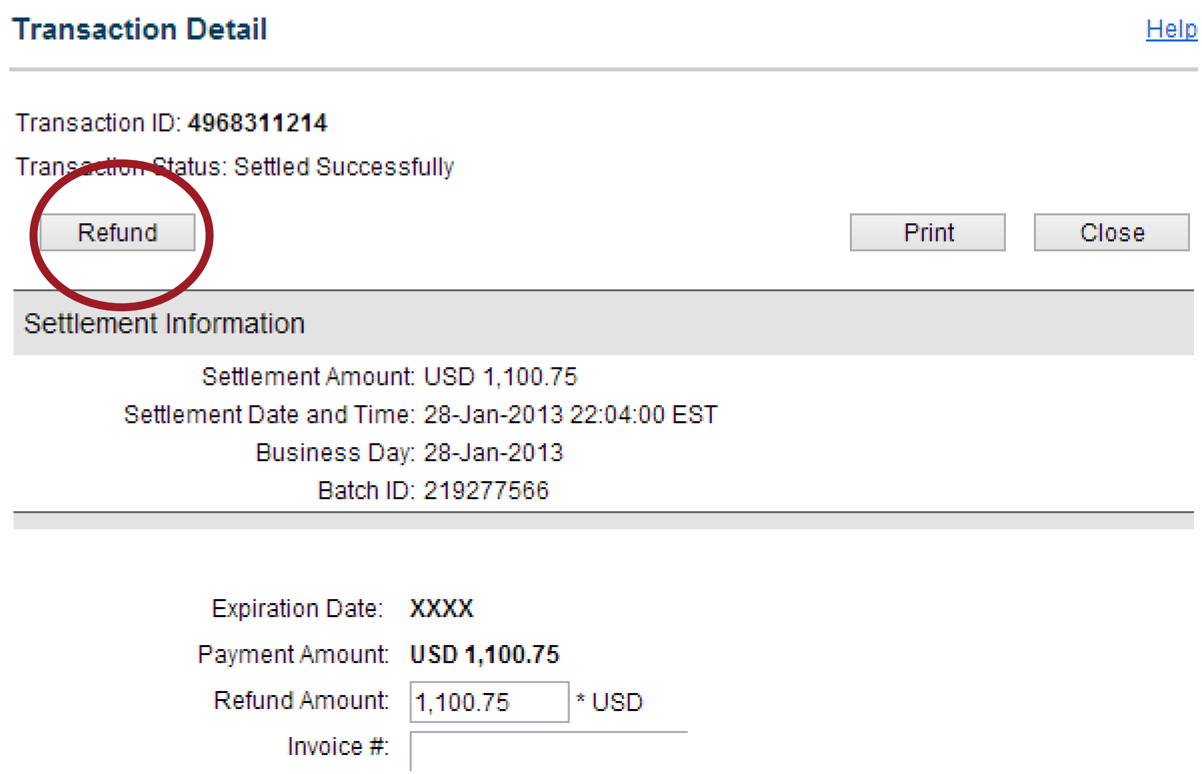






Processing a Refund (cont.)

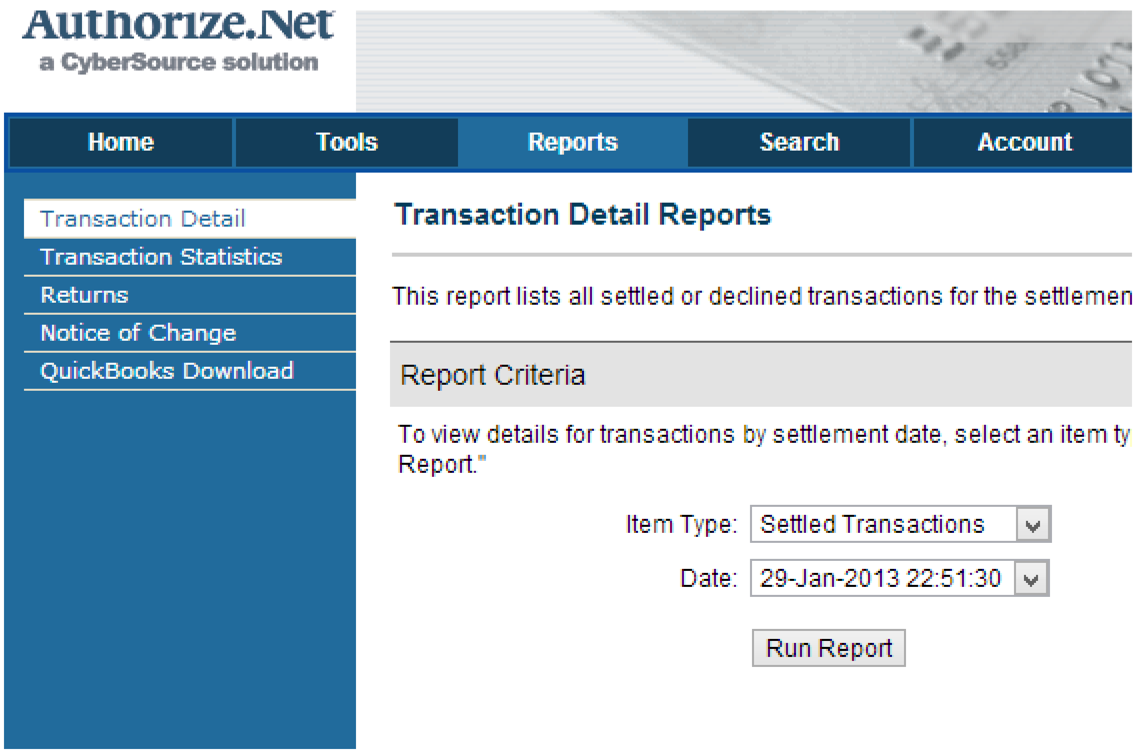
- Click Refund
  - You can refund the full amount of the original transaction or change the amount



Note: Must enroll in Card Information Manager to retain Card Data for Refunds

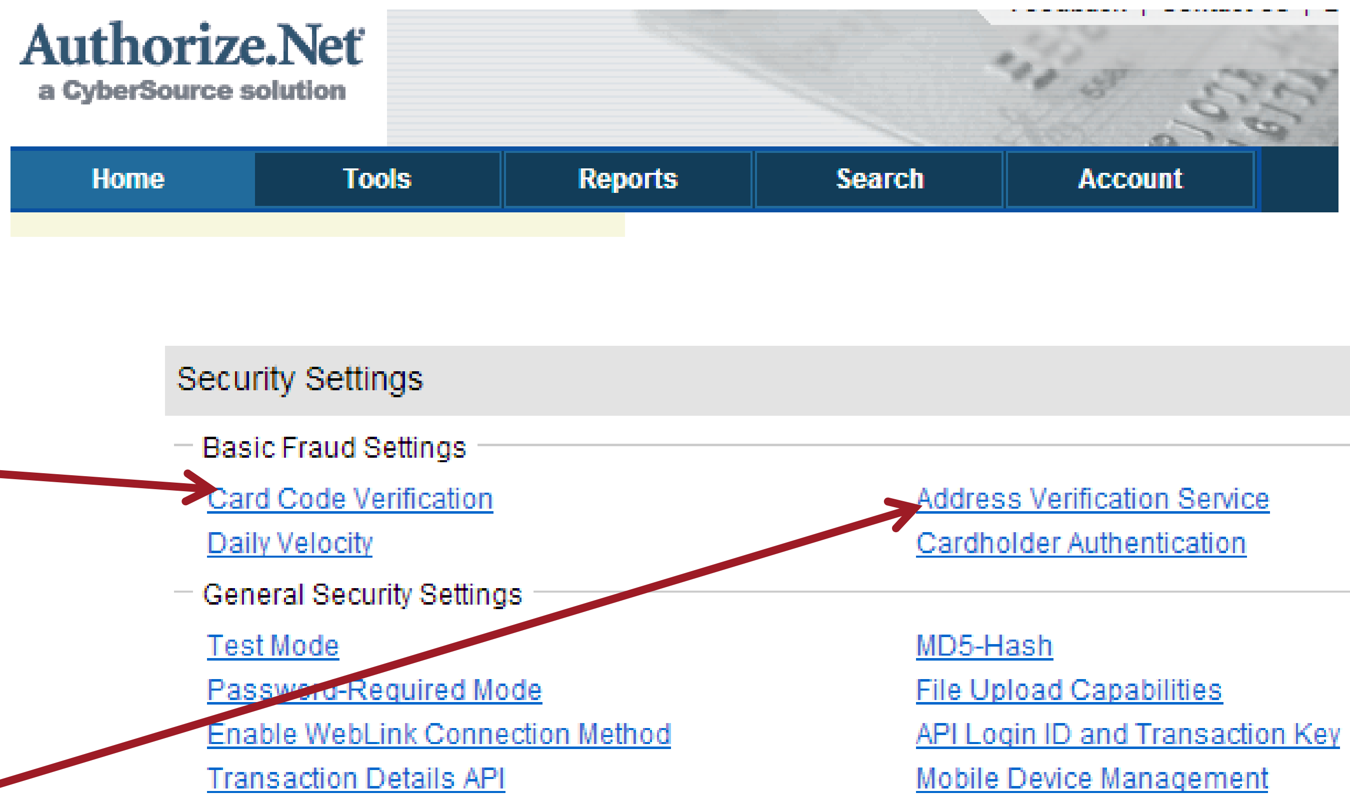
Reports

- Many reports are available
- Choose Type, Date, or Date Range
- Click Run Report

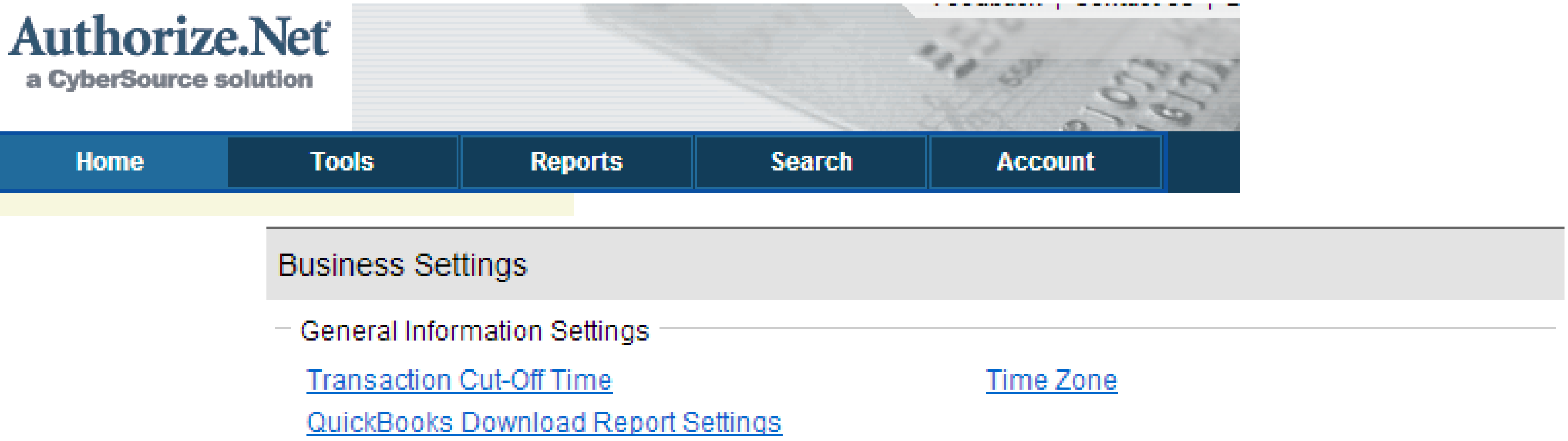


Security Settings

- Select Account Tab, then Scroll Down to Security Settings
  - You can choose to decline transactions with invalid CVV code
  - You can choose to decline transactions with AVS (address verification) mismatch



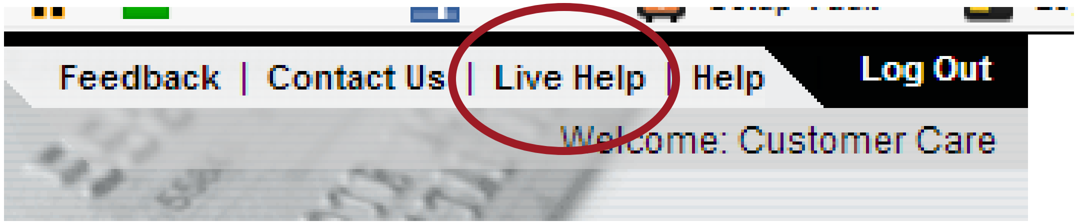
Other Settings



- Select Account Tab, then Scroll Down to Business Settings:
  - Make sure you have the correct Time Zone loaded
  - Select the Transaction Cut Off Time (when you want your daily transactions to batch)

Questions?

- Authorize.net Phone: 1-877-447-3938
- Live Help:



- Allegiance Merchant Services Phone: 704-315-5775/ 1-800-450-4125
- Email: info@allegiancems.com