

The logo graphic consists of three horizontal bars of varying lengths and colors: a top blue bar, a middle red bar, and a bottom blue bar. A red triangle points to the right, positioned between the bars and the text.

Allegiance

MERCHANT SERVICES

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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.



Please Log In!

Login ID:

Password:

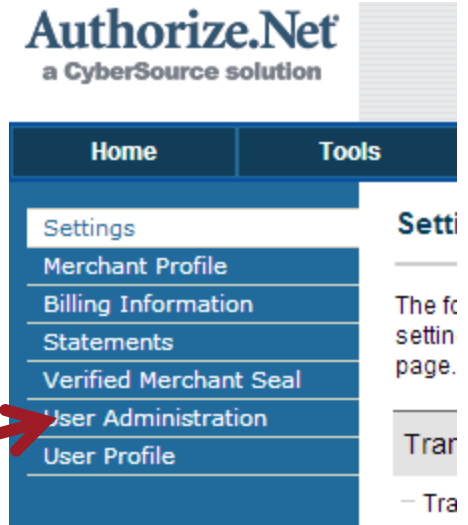
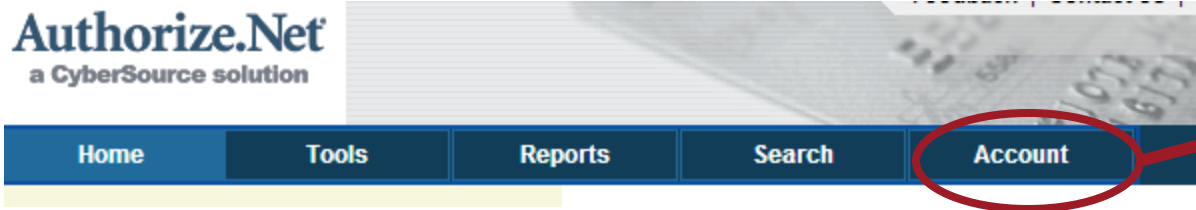
Log In

[Forgot Your Password?](#)

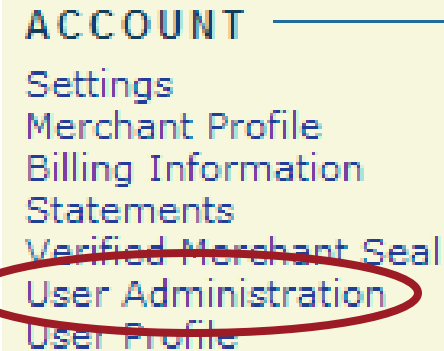
[Forgot Your Login ID?](#)

Adding Users

- Click Account tab (listed at top of 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

User Administration

Payment Gateway ID: [']
Reference ID: []

Select + Add User to create a new user account, or s
edit or for which you would like to perform an action.

+ Add User | Edit User | - Delete User | Res

Name	Type
Customer Care	Account

User Roles

User Role: -- Select One -- * [What is this?](#)

Secret Question and Answer

*Required Fields

Enter the secret answer for your account and click Next > below to continue.

Secret Question: What is the name of a college you applied to but didn't attend?

Secret Answer: *

Cancel

Next >

Setting up Payment Form

- Click Account Tab
- Click Virtual Terminal

Authorize.Net
a CyberSource solution

Home

Tools

Reports

Search

Account

Transaction Format Settings

– Transaction Submission Settings

[Virtual Terminal
Payment Form](#)

[Upload Transaction File Format
Partial Authorization](#)

– Transaction Response Settings

- 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

Field Name	View/Edit	Required
Payment Information		
Currency	<input type="checkbox"/>	<input type="checkbox"/>
Recurring Billing Transaction	<input type="checkbox"/>	<input type="checkbox"/>
Card Code	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Order Information		
Invoice No	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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

The screenshot displays the Authorize.Net interface, a CyberSource solution. The navigation menu includes 'Home', 'Tools', and 'Reports'. The 'Virtual Terminal' link is circled in red. Below the navigation, there is a section for 'Payment/Authorization Information' with the following fields: 'Card Number' (with a note to enter without spaces), 'Expiration Date' (in mmyy format), 'Amount' (with an example of 10.00), and 'Card Code'. Below this is the 'Order Information' section with 'Invoice #' and 'Description' fields. The 'Customer Billing Information' section is partially visible at the bottom.

Authorize.Net
a CyberSource solution

Home Tools Reports

Virtual Terminal Unsettled Transactions

Payment/Authorization Information

Accepted Payment Method Visa, MasterCard, American Express, Discover, eCheck

Card Number (enter number without spaces) *

Expiration Date (mmyy) *

Amount (i.e., 10.00) *

Card Code

Order Information

Invoice #

Description

Customer Billing Information

Customer ID

Processing a Sale

- Enter Address and Zip Code to ensure lowest processing rate
- Enter Email address and your customer will receive an 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

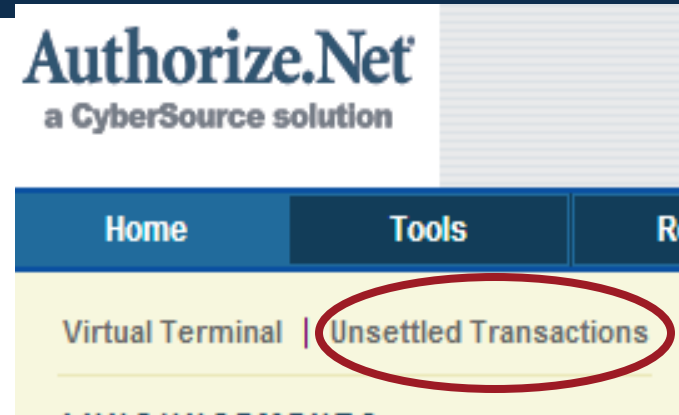
Fax

Email

PO Number

Processing a Void

- ❑ Click Unsettled Transactions from the Home Screen
- ❑ Click the Transaction ID of the transaction you need to void
- ❑ Click Void



Filter by: ALL View

1-4 of 4 results

Trans ID	Invoice Number	Trans Status	Submit Date
4973088042		Captured/Pending Settlement	30-Jan-2013 16:35:24
Help 1		Captured/Pending Settlement	30-Jan-2013 13:56:07
1		Captured/Pending Settlement	30-Jan-2013 13:29:08
4		Refund/Pending Settlement	30-Jan-2013 11:54:06

Transaction Detail

Transaction ID: 4973088042

Transaction Status: Captured/Pending Settlement

Void

Print

Close

Settlement Information

Settlement Amount: USD 168.00

Settlement Date and Time:

Authorization Information

Note: You can also reprint the receipt from the screen

Processing a Refund

Click Search Tab

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a CyberSource solution

Home Tools Reports **Search** Account

Enter the Date Range

Enter Your Search Criteria

Click Search (at the bottom of screen)

Click on the Trans ID

Search by Batch Search by Batch

Settlement Date

From: ALL Settled

To: ALL Settled

Credit Card / Bank Account

Please enter either full number or last 4 digits only.

Payment Method: ALL

Credit Card #:

Bank Account #:

Trans ID	Invoice Number	Trans Status	Submit Date	C
--------------------------	--------------------------------	------------------------------	-----------------------------	-------------------

4968311214

Settled
Successfully

28-Jan-2013
19:08:58

Pe
Ri

First Last
Name:
ID:

Processing a Refund (cont.)

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

Transaction Detail [Help](#)

Transaction ID: 4968311214
Transaction Status: Settled Successfully

Settlement Information

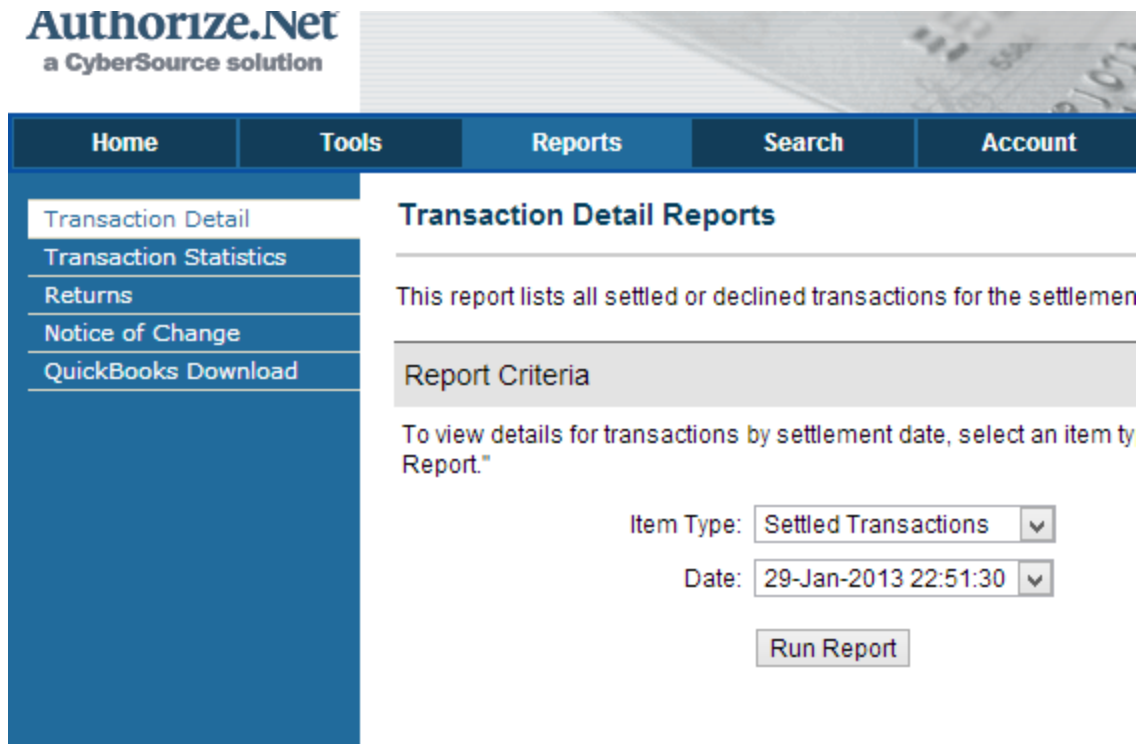
Settlement Amount: USD 1,100.75
Settlement Date and Time: 28-Jan-2013 22:04:00 EST
Business Day: 28-Jan-2013
Batch ID: 219277566

Expiration Date: XXXX
Payment Amount: USD 1,100.75
Refund Amount: * USD
Invoice #:

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



Authorize.Net
a CyberSource solution

Home Tools **Reports** Search Account

Transaction Detail
Transaction Statistics
Returns
Notice of Change
QuickBooks Download

Transaction Detail Reports

This report lists all settled or declined transactions for the settlement date.

Report Criteria

To view details for transactions by settlement date, select an item type to report on.

Item Type:

Date:

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

The screenshot shows the Authorize.Net account dashboard. At the top, the logo reads "Authorize.Net a CyberSource solution". Below the logo is a navigation bar with tabs for "Home", "Tools", "Reports", "Search", and "Account". The "Account" tab is selected. Below the navigation bar, the "Security Settings" section is expanded, showing a list of settings:

- Basic Fraud Settings
 - [Card Code Verification](#)
 - [Daily Velocity](#)
- General Security Settings
 - [Test Mode](#)
 - [Password-Required Mode](#)
 - [Enable WebLink Connection Method](#)
 - [Transaction Details API](#)
- [Address Verification Service](#)
- [Cardholder Authentication](#)
- [MD5-Hash](#)
- [File Upload Capabilities](#)
- [API Login ID and Transaction Key](#)
- [Mobile Device Management](#)

Two red arrows point from the text on the left to the "Card Code Verification" and "Address Verification Service" links in the screenshot.

Other Settings

Authorize.Net
a CyberSource solution

Home

Tools

Reports

Search

Account

Business Settings

– General Information Settings

[Transaction Cut-Off Time](#)

[Time Zone](#)

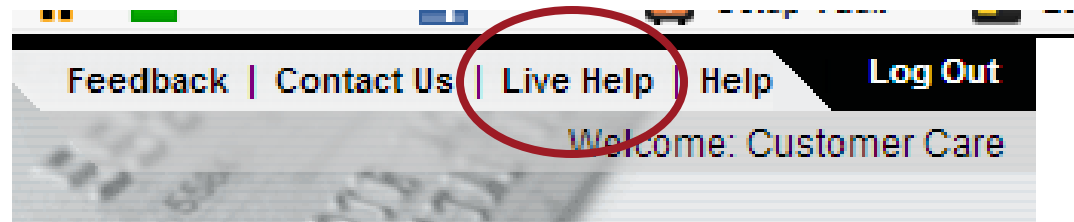
[QuickBooks Download Report Settings](#)

- ❑ 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