Using Payeezy Gateway

In this course we will take a look at using the Payeezy online Gateway. A Pre-authorization transaction will be demonstrated along with the steps needed to complete it. We will also review a Purchase, a Refund, a Void and a Forced Post. Let's dig in.

Within the Payeezy Gateway, click the 'POS' Tab to process transactions. If you have multiple locations, select the correct Terminal.

Now choose the 'Transaction Type'.

We will select Pre-Authorization and submit it with a zero dollar amount. Enter zero in the 'Order Amount' field.

Type in the 'Card Holder's Name' exactly as it appears on the card.

Enter the 'Credit Card Number' and the Expiry Date.

If you have a credit card reader you can place the cursor in the 'Credit Card Number' field and swipe. The Credit Card Number, Card Holder's Name and Expiry Date fields will all automatically populate.

Next, enter any 'Reference Number' or 'Customer Reference' information.

The reference fields are optional.

AVS stands for Address Verification String.

This process checks the cardholder addresses against records at the credit card companies and rates the level of match.

Enter the 'Address', 'Zip' and select the correct 'Country' from the drop down list.

The Override Terminal Type field has a dropdown that allows you to select a different terminal type.

Click the 'Process Transaction' button to complete the Pre-Authorization.

A receipt will display on the screen.

If you have a printer connected to your terminal you may 'Print' the receipt   or 'Email' it to the customer.

To charge a cardholder's account after obtaining an authorization, select 'Pre-Authorization Completion' from the Transaction Type dropdown.

A valid 'Authorization Number' must be entered. This is available on the receipt and in the Transaction search grid.

Click the 'Process Transaction' button.

You can also select the Pre-Authorization directly from the 'Transactions' tab   and select the 'C' button in the 'Actions' column.

 To enter a customer's 'Purchase' select that choice from the 'Transaction Type' dropdown.

Enter the amount of the sale in the 'Order Amount' field.

Enter the 'Card Holder's Name' exactly as it appears on the card.

Fill in the 'Credit Card Number' and 'Expiry Date'.

The 'Reference Number' is searchable from the Transaction tab and it is recommended that you enter a document number or additional information here.

'Customer Reference' and 'Reference Number 3' are also optional fields.

Your terminal can be configured to require and validate the customer's billing information.

Enter the 'Address', 'Zip' and select the correct 'Country'.

It is recommended that you always enter the customer's billing zip code for slightly lower interchange on manually keyed transactions.

Make any needed changes in the 'Override Terminal Type' dropdown.

Any desired value may be entered in the 'Merchant Terminal Number' field.

Verify that all information is correct and press the 'Process Transaction' button.

The 'Quick Key' tab allows you to enter a transaction more rapidly.

 Select the Transaction type.

Enter the Order Amount, Card Holder's Name and Number along with the Expiry Date.

Include any Reference Number or Customer Reference along with the AVS information.

Click 'Add transaction'.

You can also upload a batch of up to 250 transactions from a .csv file by clicking the 'Upload File' link.

When you are finished, press the 'Process' button.

Batch totals display at the top of the screen and a green check indicates that all of the transactions have been processed.

To create a 'Refund', select it from the Transaction Type dropdown.

Complete the fields as described previously and choose 'Process Transaction'.

You can also perform this from the 'Actions' column located in the Transactions tab.

A void can be accomplished before settlement on the same day that the original transaction was entered.

Voids easily performed by locating the original transaction in the Transactions tab and pressing the 'V' button in the Actions column.

You can also select 'Void' from the Transaction Type dropdown on the POS tab.

A 'Forced Post' transaction is used for a Pre-Authorization that has not yet been completed or charged to the cardholder.

Like a Void transaction, a valid authorization code is required.

This transaction type could be used to re-enter offline transactions that did not properly update.

It is very important that only recent, valid authorization codes be entered.

Using Payeezy to Pre-Authorize transactions, create Purchases, process Refunds and Voids is simple and intuitive.

Refer to the Payeezy Gateway Guide located in the course materials section for step by step instructions.

You can also download the Transcript of this Training on Demand course for reference.

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