

## How do I use the virtual terminal to perform a transaction?

Posted: Oct 20, 2016

1. Open Virtual Terminal by clicking on the Virtual Terminal button on ROAMmerchant's App Dashboard.

# ROAMmerchant



Recent Activity My Account Sub-Merchants **Virtual Terminal** Support

### Virtual Terminal

2. You will now be presented with the Virtual Terminal screen, as shown below:

#### Virtual Terminal

##### Transaction

* Amount	<input type="text" value="\$0.00"/>	
Discount	<input type="text" value="\$0.00"/> <input type="button" value="\$"/> <input style="margin-left: 10px;" type="button" value="%"/>	
Discount Description	<input type="text"/>	
Tax (%)	<input type="text" value="0"/>	
Tip	<input type="text" value="\$0.00"/> <input type="button" value="\$"/> <input style="margin-left: 10px;" type="button" value="%"/>	

<b>Subtotal</b>	\$0.00
<b>Discount</b>	\$0.00
<b>Tax</b>	\$0.00
<b>Tip</b>	\$0.00
<b>Total</b>	\$0.00

##### Payment Information

Tender Type  Credit  Cash

\* Card number

\* Expiration Date

\* CVV

\* Postal Code

Email Address for Receipt

##### Purchase Notes (optional)

##### Customer Information (optional)

3. Enter the following information:
  - Amount: This field is required, and the value should not exceed \$100,000.00
  - Discount: The discount should not exceed the amount.
  - Discount Description (optional)
  - Tax
  - Tip
4. Under Payment Information, you have the option to select the **Tender Type**. If card, then you will be prompted to enter the following information:
  - Card Number
  - Expiration Date
  - CVV
  - Postal Code
  - Customer's email address (to email the receipt to your customer)

If cash, you will be prompted to enter the following, separate information:

- Cash Received
  - Customer's email address (to email the receipt to your customer)
5. Click on the **Enter Purchase Notes (Optional)** link if you wish to enter a Transaction Note and Invoice Number for reporting purposes.

##### Purchase Notes (optional)

Transaction Note

Invoice Number

Include transaction note and invoice number on receipt

6. Click on the **Enter Customer Information (Optional)** link to enter your customer's contact information.

##### Customer Information (optional)

i Please ask for customer's consent before collecting any personal information.

First Name

Last Name

Address

Address 2


City

State/Province/Region

Zip/Postal Code

Phone


7. Click on **Review Order** to check the order before submitting.



### Review Cash Sale

Subtotal	\$10.00
Discount	\$0.00
Tax (0%)	\$0.00
Tip	\$0.00
<b>Total</b>	<b>\$10.00</b>
<b>Cash Received</b>	<b>\$20.00</b>
<b>Change</b>	<b>\$10.00</b>

8. After reviewing the order, click on **Submit** to submit the transactions. You will then receive a response from the processor, approving or declining the transaction.
9. Click **OK** to return to the virtual terminal.



### Transaction Approved