

QUICK REFERENCE GUIDE

VeriFone Omni VeriFone V^x



This Quick Reference Guide will guide you through understanding your terminal's functionality and navigation, and will help you with troubleshooting.

CHASE ™
Paymentech

INDUSTRY

Retail and Petroleum

APPLICATION

Chase Paymentech's UEPH290/SEPH290

TERMINALS

VeriFone's V^x/Omni Series

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Location	Function
First Hot Key Far Left	<p>Down Arrow - press to scroll down to the next menu.</p> <p>Up Arrow - press to scroll up to the previous menu.</p> <p>Press the yellow key to toggle between the directional arrows.</p>
Third Hot Key Middle Right	Gift Card - press to initiate a gift card transaction.
Fourth Hot Key Far Right	Reports - press to access available reports.

Hot Key Functions

Press the hot keys beneath the display to navigate your terminal's menus.

Available Transaction Types

Your terminal supports various transaction types.

Refer to this section for information on what transactions are available, when to use them, and how to begin the transaction.

Note: Press [Arrow] to scroll to view additional options.

**Purchase and Commercial cards are supported for this transaction type.*

Credit Transactions	To initiate
Credit Sale* A sale transaction using a credit card; the card may or may not be present.	Swipe the card or select Sale .
Phone/Web Order* A credit sale transaction in which the card is not present.	Select Phone Order .
Auth Only* An authorization-only transaction provides an approval, but does not charge the consumer until the transaction has been added to the batch by way of a force transaction.	Select Auth Only .
Void* Perform a void to reverse a credit sale, force, or refund transaction and prevent any funds from transferring from the cardholder's account. Only available for transactions in the current batch (i.e., same day).	Select Void .
Force* Perform a force sale when the terminal cannot reach the host (Chase Paymentech) to authorize a transaction, or to finalize an Auth Only transaction. Contact your voice authorization center for an authorization code, then force the transaction.	Select Force .
Refund* Perform a refund to return money to a cardholder's account from a credit sale completed in a closed batch (i.e., previous day). May also be used to adjust a previous transaction.	Select Refund .

Debit Transactions	To initiate
Debit Sale A sale transaction using a debit card; the card must be swiped.	Swipe the card.
Debit Refund Perform a debit refund to return money to a cardholder's account from a debit sale completed in a previous batch. May not be available for all card issuers.	Select Refund .

EBT Transactions (Retail Only)	To initiate
<p>EBT Sale An Electronic Benefits Transfer (EBT) card is a government-issued card tied to a specific government-assistance account. EBT transactions require PIN entry, as well as a trace number and balance amount printed on receipts. An EBT sale transaction may be a food stamp sale, or a cash benefit sale. The card must be present.</p>	<p>Swipe the card or select Sale.</p> <p>Select Cash for cash benefits or Food for a food stamp sale.</p>
<p>EBT Force A force is a sale transaction performed when the terminal cannot reach the host to authorize the transaction. Contact your voice authorization center for an authorization code, then perform a force sale transaction with the EBT card.</p>	<p>Select Force.</p>
<p>EBT Refund Available only for food stamp transactions.</p>	<p>Select Refund.</p>
<p>EBT Balance Inquiry Obtain a customer's remaining EBT account balance. Available for both food stamp and cash benefit.</p>	<p>Select EBT Bal Inq.</p>

Available Transaction Types

Continued

Your terminal supports various transaction types.

Refer to this section for information on what transactions are available and when to use them.

Note: Press **[Arrow]** to scroll to view additional options.

Clerk Setup

Accessible through the main menu, the clerk setup allows you to manage IDs and passwords.

ADD CLERK

Adds new clerks to your terminal. You will be prompted to create an ID and a password for each new clerk. The clerk ID may be up to four digits in length and the password may be up to 6 digits in length.

LOG ON/OFF CLERK

Used to log on clerks as their shifts begin, and log them off at the end of their shift.

DELETE CLERK

Removes a single clerk from the terminal.

MODIFY CLERK

Allows modification of a clerk's password.

CLEAR CLERKS

This option is used to clear clerk totals from the clerk's internal totals file.

Available Reports

A report is like a snapshot in time of business activities. Use this data to help you make crucial business decisions.

Press **[Reports]** to launch the Reports menu.

Reports: Main Menu

Totals Report Prints totals by card issuer.

Detail Report Prints detail information for each transaction.

Clerk Reports Launches Clerk Reports menu options. (See **Reports: Clerk Reports Menu.**)

Batch Review Launches Batch Review menu options. (See **Reports: Batch Review Menu.**)

Batch History Prints a series of settlement reports by date.

Terminal Reports Launches Terminal Reports menu options, which are used by the Help Desk Associate to troubleshoot your terminal.

Host Totals Runs the Host Totals transaction and prints a report.

Products Report (Petroleum Only) Prints a list of product codes, prices and descriptions.

Reports: Clerk Reports Menu

Totals Report Prints totals for all clerks.

Detail Report Prints detail information on all transactions performed by all clerks, or a specific clerk.

Shift Report Prints transaction totals per shift.

Clerk Table Prints all clerks, clerk passwords and indicates whether the clerk is logged in, if enabled.

Reports: Batch Review Menu

Totals Review Displays Total Sales, Total Refunds and Net Sale Totals.

Detail Review Allows access to view details on all transactions in the current batch. Enter search criteria to retrieve transactions in the current batch, and then you may adjust or void the transaction.

Available Reports

Continued

A report is like a snapshot in time of business activities. Use this data to help you make crucial business decisions

Press **[Gift Card]** and then select **Reports** to launch the Gift Card Reports menu.

Reports: Gift Card Reports Menu

Totals Report Prints totals for all gift card transactions in the current batch.

Detail Report Prints details on all gift card transactions in the current batch.

Clerks Report Displays menu to print totals report, detail report or cashout report by Clerk ID.

Cashout Report Prints a list of cashed-out gift card redemptions by clerk.

Pre-Auth Report Prints a list of open pre-auth redemptions.

Gift Card Transactions (Optional)	To initiate
Issuance/Add Value Adds value to the gift card account. This transaction can be used to issue and activate a new card, or to reload an active card with incremental value.	Select Issue Add Value .
Activation/Block Activation Create a consumer's gift card account by assigning value to a card. One or more gift cards can be activated at one time. Activations can only be performed on cards that have not been previously activated.	Select Activation or Block Activate .
Redemption Decreases the value stored on the consumer's gift card account. This transaction is performed when a consumer uses the card to purchase goods or services.	Select Redemption .
Void Remove a gift card transaction from the terminal's open batch. The void will communicate to the gift card host that the transaction is being reversed.	From the main menu, select Void .
Balance Inquiry Print a receipt that displays the customer's available gift card balance (without changing it).	Select Balance Inquiry .
Force Perform a force redemption, activation or issuance when the terminal cannot reach the gift card host.	Select Force Issuance, Force Redempt or Force Activate .
Deactivation When enabled, change the status of a card from active to inactive. Inactive cards may not be used for redemptions	Select Deactivation .
Reactivation When enabled, this transaction allows the merchant to change the status of a card from inactive to active. This transaction can only be used to activate "deactivated" cards.	Select Reactivation .

Gift Card Transaction Types (Opt.)

If you are participating in Chase Paymentech's proprietary Gift Card program, your terminal supports various stored value card transaction types.

Refer to this section for information on what gift card transactions are available and when to use them.

Press **[Gift Card]** to launch the Gift Card menu.

Note: Press **[Arrow]** to scroll to view additional options.

Navigating Your Terminal

Refer to this section to find and begin the transaction or function you wish to use.

BEGIN A SALE

Swipe the card; or select **Sale**, manually enter the card number and then press **[ENTER]** to begin a sale transaction. Your terminal will guide you through the process. (Note: Debit cards must be swiped.)

BEGIN OTHER TRANSACTIONS

Use the **[Arrow]** hot key at the main menu or idle prompt to navigate to the transaction type you wish to perform. Scroll through the menu and press the corresponding **[F]** key when your desired transaction appears on the terminal display.

REPRINT A RECEIPT

Access the Reprint function through the main menu. You will be prompted to select last receipt, or enter criteria to search for another receipt to reprint.

ACCESS CLERK SETUP

Navigate to the Clerk Setup option from the main menu.

ACCESS REPORTS

Press **[Reports]** to access the Reports menu. Scroll to the desired report or report category, then press the corresponding **[F]** key and follow the prompts to view or print your report.

EDIT AUTO SHIFT TIMES

If you are in auto shift mode, use this procedure to edit the start and end shift times. Press **[1]** at idle to access the Shift menu.

MANUAL SHIFT CLOSE

If you are in manual shift mode, use this procedure to close the current shift and start a new shift. Press **[1]** at idle to access the Shift menu.

CHANGE PETROLEUM PRODUCT CODE PRICES

If petroleum processing is enabled, select **Products Admin** from the main menu to modify product code prices.

ABOUT SETTLEMENT

A Settlement operation is used to close the current batch and open a new batch for logging and accumulating transactions.

Your VeriFone terminal uses a Host Capture System (HCS), meaning all transaction information is sent to and stored by the host (Chase Paymentech) at the time of sale, or it can be stored in the device and sent at a pre-determined time.

There are three settlement options: Manual Settlement, Auto Settlement and Host Auto Settlement.

1 - MANUAL SETTLEMENT

If your terminal is set to manually settle, select **Settlement** from the main menu and follow the prompts displayed.

2 - AUTO SETTLEMENT

If your terminal is set to automatically settle, it will automatically settle transactions in the current batch at a specific, predetermined time, within a 24-hour period. When configured, auto settlement begins any time after the set time occurs if there are transactions in the batch, and the terminal will print settlement reports upon completion.

For example, if auto settlement time is set to 22:30:00 (10:30 p.m.) then auto settlement occurs any time after 22:30:00. If the terminal is turned off before the set time, and turned on again (usually the next morning), auto settlement occurs at that time.

3 - HOST AUTO SETTLEMENT

Host Auto Settlement is a feature that must be selected either at the time of initial terminal setup or must be set up by a Chase Paymentech representative. If this feature is enabled, the terminal will automatically settle transactions in the current batch at 05:00:00 (5:00 a.m.) EST and will not print settlement reports upon completion.

Settling the Batch

Your transactions must be "settled" daily. Read this section to ensure the settlement process operates smoothly.

Prompt Q&A

While navigating through transactions, you'll find that some prompts aren't as clear as others. This section clarifies those prompts.

Prompt	Description/Action
1= [Merchant 1]	<p>Prev [F1] Next [F2] Slct [F3] Exit [F4]</p> <p>Displayed when more than one merchant is programmed into your terminal. Scroll to your merchant name using the [F] keys to the right of the display, and press [Enter].</p>
Encrypted?	<p>Yes [F1] No [F2]</p> <p>May display while performing a Web sale. Select Yes or No in regard to whether the card number was collected via encrypted means (i.e., HTTPS Web page, PGP e-mail, etc.).</p>
Imprint Card Press Enter Key	<p>May display while performing a manually entered transaction. Imprint the card using a manual imprint machine to prove the card was present during the transaction.</p>
V-Code:	<p>Enter the CVC (card verification code), typically the last 3 or 4 digits found on the back of the card on the signature line. CVC codes are designed to reduce payment card fraud.</p>
Code Present?	<p>No [F1] Xread [F2]</p> <p>Displays if V-Code prompt is bypassed. Select Xread if the code is present, but unreadable.</p>
Send Duplicate?	<p>Yes [F1] No [F2]</p> <p>Displays if you are attempting a transaction with an account number that has already been used in the current batch. Select Yes to confirm that this transaction should be processed. Select No to cancel the transaction.</p>
Appr Code:	<p>Displays during a Force transaction. Key in the approval code you received from the Voice Authorization Center, and press [Enter].</p>
Amt Due: Enter to Confirm	<p>x.xx</p> <p>Press [Enter] to continue with another transaction for the amount due.</p>

Prompt	Description/Action
Driver ID:	May display during a fleet card transaction. Enter the customer's driver ID.
Odometer:	May display during a fleet card transaction. Enter the vehicle's odometer reading.
Vehicle Num:	May display during a fleet card transaction. Enter the vehicle number.

Code	Description	VISA	MC	AMEX	Disc.
X	Match - Address and 9-digit ZIP code	✗	✓	✗	✓
Y	Match - Address and ZIP code (for Discover, address only matches)	✓	✓	✓	✓
A	Partial - Address matches, ZIP code does not (for Discover, both address and ZIP match)	✓	✓	✓	✓
W	Partial - 9-digit ZIP code matches, address does not (for Discover, no data from issuer)	✗	✓	✗	✓
Z	Partial - ZIP code matches, address does not	✓	✓	✓	✓
N	No match - Neither address nor ZIP code match	✓	✓	✓	✓
U	Unavailable - AVS system unavailable or issuer does not support AVS	✓	✓	✓	✓
R	Retry - Issuer's system unavailable or timed out	✓	✓	✓	✗
S	Not supported - AVS not supported by issuer at this time	✓	✓	✓	✗

Prompt Q&A

While navigating through transactions, you'll find that some prompts aren't as clear as others. This section clarifies those prompts.

AVS Response Codes

The Address Verification System (AVS) is a feature that adds fraud protection on card-not-present transactions. The numeric portion of the customer's street address and the ZIP code are compared against the information on file with the card-issuing bank.

Use this chart to interpret domestic AVS Response Codes by card type.

Common Error Codes

In the event that your terminal displays an error, refer to these error codes to troubleshoot your terminal.

If the code you are experiencing is not shown, retry the transaction, or if possible, manually enter the account number.

If the error persists, contact your Help Desk for support.

Error Code	Description	Action
Bad Account #	The card number being used for the current transaction does not pass the LUHN check.	Retry. If error persists, ask for another form of payment as the card may be fraudulent.
Batch Full	The terminal has reached batch transaction capacity.	Perform batch settlement.
Close Batch	The batch is more than 90% full.	Perform batch settlement.
Empty Batch	Cannot perform requested function – batch is empty.	No action.
Expired card	The card's expiration date has passed.	Retry. If error persists, ask for another form of payment.
Invalid Acct No	The 4 digits keyed do not match the account number from the card's magnetic stripe.	Re-key the last 4 digits. If error persists, ask for another form of payment as the card may be fraudulent.
Invalid amount	The amount entered is invalid.	Re-key the dollar amount.
Invalid Srvr Id	The clerk number keyed has not been logged in.	Login the clerk through Clerk Setup.
Settl Neg Batch	Terminal is prompting for confirmation to settle a negative batch.	Press [Enter] to confirm that the negative batch should be settled, or press [Cancel] and print a report, which should be used to verify that the negative batch total is correct.
Void Not Allowed	The user tried to void an already voided transaction.	No action.

