

REPORTS: CLERK/SERVER REPORTS MENU

Total Report - Prints total for all clerks/servers.

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

Shift Report - Prints transaction totals per shift.

Clerk/Server Table - Prints all clerk/servers, clerk/server passwords and indicates whether the clerk/server is logged in, if enabled.

After Hours Support:

- If your Merchant ID Number Begins with: 389900 - Call 888.830.0555
- If your Merchant ID Number Begins with: 7620 - Call 877.243.6542
- If your Merchant ID Number Begins with: 536385 - Call 800.228.0210

COMMON ERROR CODES

BAD ACCNT#

Description: The card number being used for the current transaction does not pass the LUHN check.

Action: Retry, if error persists, ask for another form of payment as the card may be fraudulent.

BATCH FULL

Description: The terminal has reached batch transaction capacity.

Action: Perform batch settlement.

CLOSE BATCH

Description: The batch is more than 90% full.

Action: Perform batch settlement.

EMPTY BATCH

Description: Cannot perform requested function - batch is empty.

Action: No action.

EXPIRED CARD

Description: The card's expiration date has passed.

Action: Retry, if error persists, ask for another form of payment.

INVALID ACCNT#

Description: The 4 digits keyed do not match the account number from the card's magnetic stripe.

Action: Re-key the last 4 digits. If error persists, ask for another form of payment as the card may be fraudulent.

REPORTS: BATCH REVIEW MENU

Totals Review - Displays Total Sales, Total Refunds and Net Sales 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 void the transaction.

REPORTS: GIFT CARD REPORTS MENU

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

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

Clerk/Servers Reports - Displays menu to print report, detail report or cash out report by Clerk ID.

Cash out Report - Prints a total or detail list of cashed-out gift card redemptions by clerk/server.

INVALID AMOUNT

Description: The amount entered is invalid.

Action: Re-key the dollar amount.

INVALID CLRK ID

Description: The clerk number keyed has not been logged in.

Action: Login the clerk through Clerk Setup.

SETTLE NEG BATCH

Description: Terminal is prompting for confirmation to settle a negative batch.

Action: 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

Description: The user tried to void an already voided transaction.

Action: No action.

FOR ADDITIONAL INFORMATION AND VIDEOS, PLEASE VISIT:

www.signapay.com/equipment/verifone-vx520



Verifone VX520 Training Guide

INCLUDED IN YOUR BOX



- Credit Card Terminal
- External Pin pad (Optional)
- Power Supply
- IP Cabling - Phone Line | Ethernet Cable
- Training Guide
- Two Rolls of Paper
- Manufacturer User Guide

TERMINAL SET-UP

Your terminal will arrive programmed and all you need to do is plug it in. You will either have your terminal set-up: **Internet Connection** or **Dial Up**. Internet is the preferred method of communication.

HOT KEYS

Far Left Purple Key: Down Arrow

Middle Left Purple Key: Tip Adjust

Red Key: Go Back to Previous Screen



Far Right Purple Key: Reports

Middle Left Purple Key: Reprint Receipt

Green Key: Enter

Yellow Key: Back Space

MERCHANT CUSTOMER SERVICE
Monday - Friday 8:00am - 5:00pm CST
1.800.944.1399 | SignaPay.com

TRAINING GUIDE

TO RUN A CREDIT SALE

- You should ALWAYS insert cards rather than key them if possible
- Press F2 (if your terminal has been idle for a while, you may need to press F2 twice)
- Enter amount of the sale \$
- Press the green key
- Swipe card (magnetic facing the keys) key the credit card number manually or insert.
- Press F1 to complete the sale.
- Print Customer Copy?
(F1 for YES) OR (F2 for NO)

For this training exercise, swipe two different sales. We will void one of these sales prior to closing the batch, and return one sale after the batch has been closed.

TO RUN A DEBIT SALE

- Press F2 (sometimes it needs to be press twice)
- Enter amount of the sale \$
- Press the green key
- Swipe card (magnetic facing the keys) or key the credit card number manually or insert.
- Press F2 to select debit sale
- Enter tip amount - Only FD accounts.
- Press the green key
- Customer will enter their 4 digit pin number on pin pad
- Press Green Key on the terminal (or the Green Key on a pin pad which is separate from the credit card terminal).
- Print Customer Copy? (F1 for YES) OR (F2 for NO)

PROCESS A VOID

- Press the 1st purple key - (Left Side)
- Press F1 for Void
- Void last transaction?
 - **If you Press F1 for Yes**
Press F1 to confirm credit card number
Print Customer Copy
Press (F1 for YES) or (F2 for NO)
 - **If you Press F2 for No**
Press F2 to Retrieve by Acct
Type in Last four digits of credit card
and Press the Green Key
Use F3 Key to scroll and find the credit card number to void
Press F1 when you find the transaction
you want to void

ADJUST TIP (RESTAURANT APP.)

- Press 2nd purple key (from left to right)
- On the search menu, select: (F3) Acct.
- Enter last 4 digits of credit card (this can be found on receipt)
- Press green key
- Confirm transaction info on screen
- Select (F1) to adjust.
- Enter tip amount \$
- Press green key
- Confirm transaction info on screen
- To adjust another transaction, press (F1) to adjust, (F2) previous sale, (F3) Next, (F4) invoice# and follow the previous steps
- Press the red key when done

CLOSE THE BATCH

- Press the first Purple button on the far left
- Press F3 to select "Settlement"
- Press the Green Key to confirm the batch. Within 30-60 seconds, you will get a confirmation on the terminal that says the batch has been accepted

PROCESS A REFUND

- Press the 1st Purple Key - (Left side)
- Press F2 for Refund
- Enter amount of sale \$
- Press the Green key
- Swipe card or key credit card number manually or insert
- Press F1 for credit card
- Print Customer Copy?
Press (F1 for YES) or (F2 for NO)

TO CHANGE PAPER

- Open the Cover by pushing the black plastic piece back
- Hold paper so that the start of the roll is coming from the bottom of the roll towards you. Pull free end of paper up to just past the sharp edge.
- Gently close lid
- Done

GLOSSARY

TRANSACTION TYPES

CREDIT TRANSACTIONS

Credit Sales – A sale transaction using a credit card; the card may or may not be present.

- Swipe the card or select Sale. F2

Phone/Web Order – A credit sale transaction in which the card is not present.

- Select Phone Order F3

Auth Only – An authorization only transaction provided 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

Force – Perform a force sale when the terminal cannot reach the host to authorize a transaction. Contact support for an authorization code, then force the transaction once communication is restored.

- Select Force

Void – Perform a void to reverse a credit sale, force, or refund transaction and prevent any funds from transferring from the cardholder's account. This option is only available for transactions in the current/same day batch.

- Select Void.

Refund – Perform a refund to return money to a cardholder's account from a credit sale completed in a closed batch (in other words, previous day).

- Select Refund

Open Tab (Restaurant only) – A preauthorized transaction for a specific dollar amount.

- Select Tab and then Select Open Tab

Close Tab (Restaurant only) – Perform a close tab on an open tab, and place it in the settlement batch file.

- Select Tab

Add Tip – a gift card redemption transaction for the amount of the tip, it tip processing is enabled. Press the (GIFT CARD) hot key, scroll and select

- Add TIP

Debit Sale – A sale transaction using a debit card, the card must be swiped or inserted.

- Swipe card - Insert

Debit refund – Perform a debit refund to return money to cardholder's account from a debit sale completed in a previous batch.

- Select Refund

EBT TRANSACTIONS - RETAIL ONLY

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 food stamp sale, or a cash benefit sale. The card must be present. Swipe the card or select **Sale**.

- Select **Cash** for cash benefits
- Select **Food** for a food stamp sale

EBT Force – A force is a sale transaction performed when the terminal cannot reach the host to authorize the transaction. Contact support for the authorization code, then force the sale of the transaction with the EBT card.

- Select Force.

EBT Refund – Available only for food stamp transactions.

- Select Refund

NOTE: Your Terminal supports various transaction types. Refer to this selection for information on what transactions are available and when to use them. Press (ARROW) to scroll to view additional options.

REPORTS: MAIN MENU

Totals Report - Prints totals by card issuer.

Detail Reports – Prints detail information for each transaction.

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

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

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

Merchant Report - Prints host totals by transaction, batch or merchant.

REPORTS: TAB MENU

Open Tab Report – Prints the transaction information for the current open tabs in the terminal. Access via the Tab option on the main menu.