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Logging into OmniFlex – Account Owner

NOTE: Account Owner must provide access to sub-users. Account Owner is the signer on the Worldpay Merchant Services Agreement.

To begin using your new virtual terminal solution, OmniFlex, please visit www.virtualterminal.com.

From there, follow the steps below:

1. Click on the login button
2. Click the “Forgot password?” link
3. You will need to enter the same email address this communication has been sent to
4. You will receive an email from noreply@virtualterminal.com
5. Within the email, click the link/button to reset your password


- Please note that this link is only valid for two hours
- If you don't receive the email, please check your Spam folder

Adding a Sub User

How to create a new User is easy. It requires the **Account Owner** or **Administrator** to add, create or modify a sub-level user.

User Management

Authorized Users

Filter 10 items per page 

Email Address	Role	First Name	Last Name
regina.kincaid@fisglobal.com	AccountOwner	Regina	Kincaid
regina.kincaid1@vantiv.net	AccountAdmin	Regina	Kincaid (deactivated)
rakin30@hotmail.com	Manager	Regina	Kincaid

1. Select **Add User**
2. Enter **First Name** and **Last Name**
3. Enter **Email Address**
4. Select **User Role**
 - Cashier, Admin, etc.
5. **Save** to save the user
6. **Cancel** to clear all the fields

Regina Kincaid

Vendor ID **Role *** Manager

First Name * **Last Name ***

Email Address *

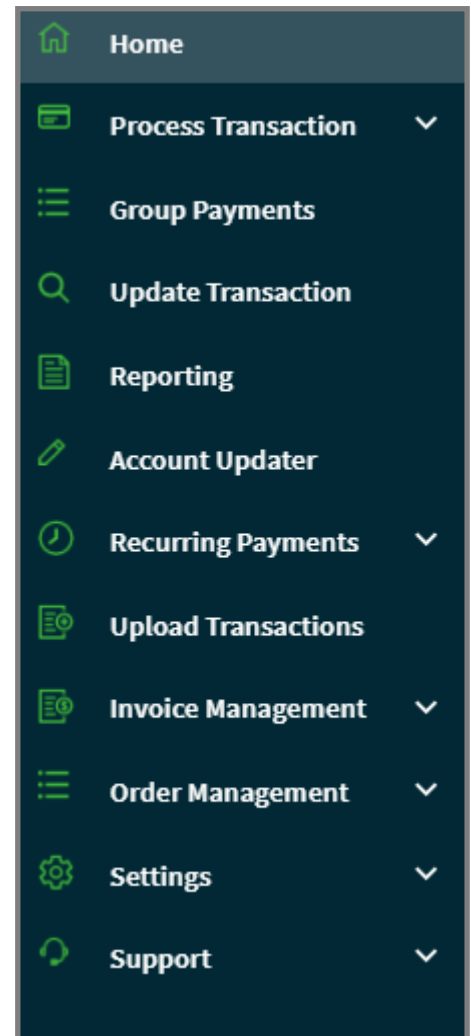
Change Sub-user Access

The Account Owner or Administrator can provide access to multi-store locations.

1. Select **EDIT MERCHANT ACCESS**
2. Select each Store Location accessible to assign it to your user, or **ADD ALL**
3. Select **REMOVE ALL** the Store Location from a user.

Navigational Menu

1. **Home** returns to the main dashboard and announcement page
2. **Process Transaction** to enter credit card payments for authorization (point of sale page)
3. **Group Payments** to enter payments faster using a data entry page
4. **Update Transaction** to manage a previous transaction from history
5. **Reporting** to generate a report
6. **Account Updater** to update Visa and Mastercard card on-file details (i.e. expiry dates)
7. **Recurring Payments** to create and manage payment schedules
8. **Upload Transactions** to upload a file for authorization (batch upload)
9. **Settings** allows the Account Owner to manage users and settings:
10. **Support** allows the user to contact Customer Care for support



Reporting

OmniFlex makes reporting easy. The application **Transaction Reports** can be used for reconciliation, whether it's for same-day authorization or checking next-day settlements. Reports can display on-screen or exported to a desired report format (.CSV, .XML or .PDF). Transaction Reports are available for up to (12) months from the original transaction date.

Transaction Reports

Start Date: 7/15/20 | End Date: 7/15/20 | Transactions: 4 selected | Status: [Dropdown]

Available Columns: Billing Address, Billing City, Billing State, Billing Zip Code, Billing Phone, Shipping Address, Shipping City, Shipping State, Shipping Zip Code, Shipping Phone

Selected Columns: Transaction ID, Transaction Name, Approval Code, Approved Amount, Transaction Amount, Status, Transaction Type, Last 4, Card Type, Date (CST)

Format: [Dropdown] | Export | Clear | Preview

Preview

Click PREVIEW above to view a preview of your report here.

Use arrow keys to display fields in the desired order on-screen or in the generated report format.

Run Reports

- Select the **Start Date**
- Select the **End Date**
- Select the report **Format** (optional)
- Build your report from the **Available Columns** to the **Selected Columns**
- Select **“Preview”** to display the report
- Select **“Generate Report”** in **.CSV, .XML or .PDF** file formats
- Select **“Reset”** to clear all fields and start a new report

NOTE: If a large date range is selected, please be patient.

Recurring Payments

Recurring Payments is a unique type of transaction where consumers authorize Merchants to bill a cardholder on a regular basis with cardholder agreement (i.e., monthly membership fees).

The application enables Merchants to store customer information and include multiple card brands / types in a secure and encrypted vault (aka: wallet) to protect cardholder information to simplify the payments process for your repeat customers.

Manage Payments

On the Manage Payments page a user can add, edit or delete cardholder information, payment methods (stored credit cards) or scheduled tasks (recurring payments).

Manage Payments			
Customer List			
Filter	10	Items per page	View Detail Add Customer
First Name	Last Name	Email	Phone
Sheldon	Cooper	sheldon.cooper@test.com	513-111-1111
Jane	Smith	jane.smith@somewhere.com	111-222-3333

The Filter field can be useful when you have many cardholders saved and you are searching for a specific recurring payment. Enter any search criteria that you may have entered for the cardholder (first/last name, email address or phone number).

View Details

To view the information stored on a customer record select the customer record from the grid and click the **“View Detail”** button at the top of the page.

Manage Payments			
Customer List			
Filter	10	Items per page	View Detail Add Customer
First Name	Last Name	Email	Phone
Sheldon	Cooper	sheldon.cooper@test.com	513-111-1111
Jane	Smith	jane.smith@somewhere.com	111-222-3333

The **Customer Payment Detail** page is now displayed. This page will display any payment method and recurring payment that exists for the customer record. Users can **Edit**, **Add** or **Delete** any of the stored information.

Manage Payments Return To List

Customer Payment Detail

Jane Smith Delete

Undo Save

Check Payment Methods Delete selected Edit selected Add

Type	Last 4	Routing	Address
Checking	3456	xxxxx0134	123 Main St.3, Denver3, CO 8010183

Credit Card Payment Methods Pay now Delete selected Edit selected Add

Type	Last 4	Expiration	Address
Visa	0007	08 / 20	-
Mastercard	2205	08 / 20	-

Recurring Payments Delete selected Edit selected Add

Payment Method	Frequency	Start Date	# of Payments	Payments Remaining	Amount	Reference Number
Checking-3456	Weekly	04/15/2019	2	1	\$5.70	
Checking-3456	Weekly	04/26/2019	3	0	\$0.33	
Checking-3456	Weekly	04/16/2019	-	-	\$3.33	
Checking-3456	Weekly	04/17/2019	7	0	\$0.77	

Add Customer

Follow the steps below to add a customer record.

1. Click the **“Add Customer”** button at the top of the page.
2. Enter the cardholder’s information.
3. Click the **“Save”** button to save the customer record, click **“Save And Continue”** button to save the customer record and add a new payment method or click the **“Cancel”** button to return to the previous page.

Add Customer

Cancel Save Save and Continue

Add a Payment Method

- From the Customer Payment Detail page, click the **“Add”** button under the Credit Card Payment Methods section.

Type	Last 4	Expiration	Address
No payment methods to display.			

- Enter the payment method (card details)
- Click the **“Save”** button to save your entry.
 - Click the **“Cancel”** button to discard the information entered

Add Payment Method

Card Number *

Expiration Date *

Street Address

City

State

Zip Code

* indicates a required field.

Add a Recurring Payment

Click the “Add” button under Recurring Payments section to create a new schedule.

Recurring Payments						
Payment Method	Frequency	Start Date	# of Payments	Payments Remaining	Amount	Reference Number
No recurring payments to display.						

Frequency: choose an option from the drop-down menu

- **OneTimeFuture:** must enter a date in the future, cannot be current date
- **Daily:** any day
- **Weekly:** Starting Date + 7 Days
- **BiWeekly:** Starting Date + 14 Days
- **Monthly:** Every Month
- **Bi-Monthly:** Every Other Month
- **Quarterly:** Every Third Month
- **Semi-Annually:** Twice a Year
- **Yearly:** One a Year
- **MonthlyLastDay:** Recurring payment will execute on the last calendar day

Complete all fields in the pop-up window, view the Merchant/Customer Authorization Forms, check the box stating you have read the authorization forms, and click the “Save” button to save the data or click the “Cancel” button to discard the information entered.

Add Recurring Payment

Frequency *

Start Date *

Amount *

Payment Method *

Number of Payments *

Reference Number

Run Until Deleted

I have read the authorization form *

* indicates a required field.

When a recurring payment processes the “**payments remaining**” column will decrease. Once the payment has been processed it will be visible on both the Update Transaction & Reporting pages.

Manage Payments Return To List

Customer Payment Detail

Sheldon Cooper Delete

First Name *

Last Name *

Email

Phone

Undo
Save

Check Payment Methods Delete selected Edit selected Add

Type	Last 4	Routing	Address

Credit Card Payment Methods Pay now Delete selected Edit selected Add

Type	Last 4	Expiration	Address
Mastercard	2205	08 / 20	123 Big Bang Rd, Somewhere, CA 90210

Recurring Payments Delete selected Edit selected Add

Payment Method	Frequency	Start Date	# of Payments	Payments Remaining	Amount	Reference Number
Mastercard-2205	Monthly	09/18/2020	2	2	\$7.00	CustomerID12



All recurring payments on Express process daily at 06:30 CT. If a Start Date is entered that does not exist in each month Express will use the last available date and all future payments for that schedule will continue to fire on the new. For example, if a Start Date is set for the 31st, then on the first month where the 31st doesn't exist Express will use the 30th and continue to use the 30th on all future payments for that schedule. This rule does not apply to the frequency of “monthlylastday”.

Update Transaction

Perform tasks such as *transaction lookup, capture from authorization, and return/reverse/void*. Each transaction can be managed up to **45 Days** from the original transaction date. The **Account Owner** will need to assign a unique role to perform Returns, Refunds and Credits.

Manage Payments

- Enter the **Transaction ID** (from the cardholder receipt) to view a specific transaction
- Select **Start Date** and **End Date** to review a range of transactions
- Select **Status** to review transactions in a specific status, or leave blank to review all
- Build your report from the **Available Columns** to the **Selected Columns** point of sale page
- Choose **Submit** to display the information
- Choose **Reset** button to clear all fields
- When complete, select a transaction to manage or change the status of a previous transaction.

Capture: enables the original authorization to be captured for settlement.

Return: enables a Refund to the cardholder after the transaction has settled.

Reverse: releases the funds held by the original authorization to the cardholder.

Void: enables the original transaction to be removed from settlement.

Rebill: enables a previous settled transaction to be re-authorized for the same amount or a different **lower** amount using the original cardholder information on-file.

Adjustment: transactions can be adjusted from their original amount **higher** or **lower**.

NOTE: Transaction can be managed up to **(45) Days** from the original transaction date. If after 45 days, call our support: 800-846-4472; Existing customer press 1 on keypad (enter your Merchant ID number); then press 1 on keypad for Account maintenance (Processing support, funding)

Update Transactions

The Update Transaction page is subject to a short delay when viewing a processed transaction after update. If you do not see the transaction record immediately on the page after update, please refresh your page to view the report.

Transaction ID: Status:

Start Date: End Date:

[View Batch Details](#)

Available Columns

- Billing Address
- Billing City
- Billing State
- Billing Zip Code
- Billing Phone
- Shipping Address
- Shipping City
- Shipping State
- Shipping Zip Code
- Shipping Phone

Selected Columns

- Transaction ID
- Customer Name
- Approval Code
- Approved Amount
- Transaction Amount
- Status
- Transaction Type
- Last 4
- Card Type
- Date (CST)

[Clear](#) [Search](#)

Transactions

Click SEARCH above to view your list of transactions here.

The selected transaction will highlight available actions based on the transaction status. If an action is available, the button will highlight the options: **Rebill**, **Capture**, **Return**, **Reverse**, and **Void**. A **Rebill** will allow you to charge a cardholder from History the same amount, or a different **lower** amount, but not a higher amount. For higher amounts the authorization only, option must be used and adjusted higher at time to **Capture**. Changing the status of a transaction can take up to **(10) minutes** to reflect the desired change. A **Confirmation** and **Receipt** page will be displayed to offer confirmation a change has occurred.

Transactions

Filter: 10 Items per page

[Receipt](#) [Rebill](#) [Capture](#) [Return](#) [Reverse](#) [Void](#)

Transaction ID	Customer Name	Approval Code	Approved Amount	Transaction Amount	Status	Transaction Type	Last 4	Card Type	Date (CST)
859759064		801387	3.89	3.89	Approved	Credit Card Sale	0007	Visa	7/15/2020 2:40:57 PM
43	Regina Kincaid			15.99	Success	Cash Sale			7/15/2020 2:26:01 PM
859759054		663813	23.05	23.05	Approved	Credit Card Sale	0007	Visa	7/15/2020 2:22:43 PM
42	Regina Kincaid			15.99	Success	Cash Sale			7/15/2020 2:15:24 PM
859759052		68028A	22.23	22.23	Approved	Credit Card Sale	0076	Visa	7/15/2020 2:13:49 PM
859759051				10.00	Declined	Credit Card Sale	0681	Mastercard	7/15/2020 2:10:27 PM
859759004		146318	100.00	100.00	Approved	Credit Card Sale	1111	Visa	7/15/2020 12:22:46 PM
859758991				7.05	Declined	Credit Card Sale	0681	Mastercard	7/15/2020 11:39:39 AM
859758989				10.00	Declined	Credit Card Sale	0076	Visa	7/15/2020 11:34:35 AM
859758951		243900	12.34	12.34	Approved	Credit Card Sale	1111	Visa	7/15/2020 8:16:00 AM

[«](#) [1](#) [2](#) [»](#)

Capture from Authorization

1. Click the “**Capture**” button.
2. Check the box next to “**Add Additional Amount**”
3. In the Additional Amount field enter the amount you want to add to the transaction.

Confirm transaction amount [X]

Add Additional Amount

Please confirm the transaction amount.

Transaction Amount *	\$23.00
Additional Amount	\$2.00
Total Amount	\$25.00

Show level 2 fields

Show level 3 fields

[Cancel] [Confirm]

The **Total Amount** field now reflects the sum of the Transaction Amount plus the Additional Amount (i.e., tax, gratuity or shipping fees, etc.)

Click the “**Cancel**” button to discard any changes or click the “**Confirm**” button to submit the transaction for the Total Amount. On the cardholders statement the transaction will appear as one transaction for the total amount submitted.

From the **Update Transactions** page click on the **View Batch Details** button. A pop-up window will be displayed showing the details of the current open batch.

Update Transactions

The Update Transaction page is subject to a short delay when viewing a processed transaction after update. If you do not see the transaction record immediately on the page after update, please refresh your page to view the report.

Transaction ID: [input] Status: [dropdown] [View Batch Details]

Start Date: [7/15/20] [calendar icon] End Date: [7/15/20] [calendar icon]

- **Batch ID:** The Batch ID is auto generated by Express
- **Total Transactions:** this is the total count of all transactions included in the batch
- **Transaction Amount:** this is the sum of all transactions included in the batch

Batch Information [X]

Details of the current batch

Batch ID:	30
Total Transactions:	43
Transaction Amount:	\$5,609.83

[Cancel] [Close Batch]

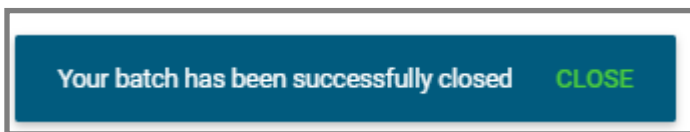
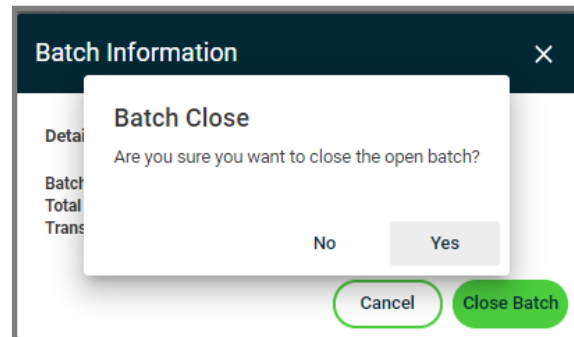
Close Batch

To close the open batch, click the **“Close Batch”** button or click **“Cancel”** to return to the **Update Transaction** page.

When a user clicks the **“Close Batch”** button a confirmation window will be displayed.

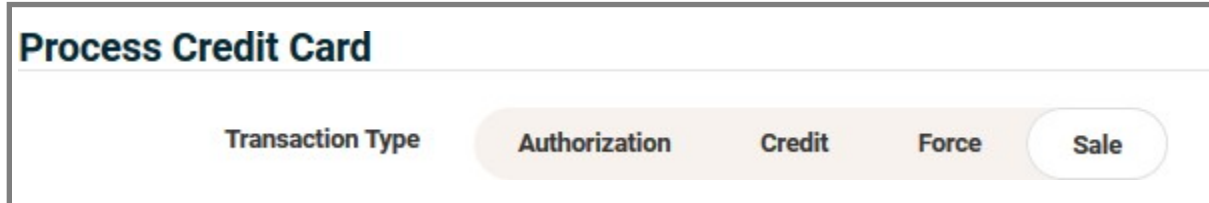
Click **“Yes”** to continue or **“No”** to cancel the request.

Once the request is completed a confirmation will be displayed.



Capture Sale

Begin on the **PROCESS TRANSACTION** page and select a desired **Transaction Type**. Each supported transaction type is displayed to select your choice.



Transaction Type

The application will display each available **Transaction Type**:

- **Authorization** is used to perform a credit card authorization only
 - The authorization will hold the amount until the sale is captured releasing the hold for settlement.
 - Cardholder funds are not released until the authorization is captured, force or reversed.
- **Sale** is used to authorize, capture and settle a sale transaction
- **Force** is used to complete a voice authorization sale and requires the approval code to complete the transaction.

Transaction Information

During a device transaction the expiration date, security code and billing name fields will parse and populate at time of submission using the device.

Card-on File Storage

The application offers optional storage of cardholder and bank account information for repeat customers and recurring payments from the point of sale page.

From the **PROCESS TRANSACTION** page:

1. Select “**Save Card Details**”
2. Enter the cardholder **First Name** and **Last Name**
3. The record is now stored within the **Recurring Payment** to schedule a payment or perform an immediate one-time payment.

Application Support

Have a question?

Worldpay recommends contacting OmniFlex Support at **1-800- 808-6394**. We're available Monday through Friday, from 8 am - 8 pm ET to assist you.

Support Hub

- [OmniFlex User Guide](#)

About OmniFlex

- OmniFlex is your secure online solution that gives you the flexibility to accept and manage all your transactions from anywhere, at any time by expanding your range of accepted payment methods
- Please note that OmniFlex is a stand-alone solution and **is not integrated with your point-of-sale solution**