

# iQ Pro+

## Click Icon to Download

### Create Customer

1. **Log in** to iQ Pro+ as a gateway user and **navigate** to **Customers**.
2. **Select Create Customer**.
3. **Select** a payment method to enter for the customer: **Card, ACH, or No Payment Method**.
4. *(Optional)* **Enter a Custom Customer ID**.
  1. The Customer ID cannot be changed after creation.
5. *(Optional)* **Enter a Description** for the customer.
6. **Enter Billing** and/or **Shipping** contact information.
7. **Select Create Customer**.
8. A **Customer Created** confirmation message will display at the top of the page.

### View Customer

1. **Log in** to iQ Pro+ as a gateway user and **navigate** to **Customers**.
2. From the customer list, **locate** the customer using the search filters.
3. **Select** the eye icon to view the customer.
4. The customer record opens in **view mode**.

### Edit Customer

1. **Log in** to iQ Pro+ as a gateway user and **navigate** to **Customers**.
2. From the customer list, **locate** the customer using the search filters.
3. **Select** the pencil icon to open the customer in edit mode.
4. **Update** the desired fields, such as notes or contact details.
5. **Select Update** to save changes.

### Delete Customer

1. **Log in** to iQ Pro+ as a gateway user and **navigate** to **Customers**.
2. From the customer list, **locate** the customer using the search filters.
3. **Select** the red trash can icon.
4. **Confirm** deletion by selecting **Yes, Delete This Customer**.

### Add Payment Method

1. **Log in** to iQ Pro+ as a gateway user and **navigate** to **Customers**.
2. From the customer list, **locate** the customer using the search filters.
3. **Select** the eye icon to open the customer record.
4. **Select Create a Payment Method**.
5. **Select Card** or **ACH**.
6. **Enter** the applicable payment method details.
7. *(Optional)* **Select** the **Default Payment Method** option.
8. **Select Submit**.
9. The payment method will display in the **Payments** list.

### Add Address

1. **Log in** to iQ Pro+ as a gateway user and **navigate** to **Customers**.
2. From the customer list, **locate** the customer using the search filters.
3. **Select** the eye icon to open the customer record.
4. **Select** the **Address** tab.
5. **Select Create an Address**.
6. **Select** whether the address will be the default for **Billing, Shipping, Both,** or **Neither**.
7. **Enter** the address details.
8. **Select Submit**.
9. A **Success** message will display, and the address will appear in the customer's address list.

### Process Transaction on Virtual Terminal

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1. **Log in** to iQ Pro+ as a gateway user and **navigate** to the **Virtual Terminal**.
2. **Enter** the transaction amount and any additional applicable fields.
3. **Select** the payment type: **Card**, **ACH** (*if applicable*), or **Physical Terminal** (*if applicable*).
4. **Enter** Card or ACH details.
5. **Select Submit**.
6. The payment will display in the **Payments** list.

#### **Process Transaction on Virtual Terminal with Customer Record**

1. **Log in** to iQ Pro+ as a gateway user and **navigate** to the **Virtual Terminal**.
2. **Enter** the transaction amount and any additional applicable fields.
3. **Select Add a Customer**, **locate** the customer using the search filter, and **select** the customer.
4. **Choose** a payment method: **Enter Card Information** or **Enter Bank Information**.
  1. The customer's saved payment method will populate automatically.
  2. **Select** whether to charge the saved method or **enter** new payment details.
5. **Select Submit**.
6. The payment will display in the **Payments** list.

#### **Reporting - Settlements**

- **Log in** to iQ Pro+ as a gateway user.
- **Select Reporting** from the left navigation menu.
- **Select Settlements**.
- Review the **Cumulative Totals** row, which displays totals for:
  - Captured
  - # Trans (number of transactions)
  - Net
  - Base
  - Credit
  - (If applicable) Surcharge or Payment Adjustment
- **Select Download** to export the results summary in **CSV** or **PDF** format.
  - Both formats include the totals row.
- **Select** the magnifying glass icon next to a settlement to view **Settlement Details**.

- Review settlement and transaction details.
- **Select Transaction Search** to open the **Transactions List** with the **Settlement Batch ID** pre-populated.
- From **Settlement Details**, **select Download** to export transaction-level details in **CSV** or **PDF** format.
  - Both formats include the totals row.

### Select & Toggle Between Gateways

1. If your email is associated with multiple gateways, a gateway dropdown will appear at login.
2. **Select** the gateway you want to access.
3. To switch gateways after logging in, **select Switch Gateway** at the top of the screen.
4. **Select** the desired gateway.
  - You will be logged out of the current gateway and logged into the selected gateway.

### Add User

1. **Log in** to iQ Pro+ as a gateway user and **navigate** to **Manage**.
2. **Select Users**.
3. **Select Create New User**.
4. **Enter** the user's email and **select Next**.
5. **Enter** the **First Name**, **Last Name**, and **Phone Number**.
6. **Select** the appropriate **Role Type**.
7. **Select Submit**.

### To edit a user:

- **Select** the pencil icon next to the user and **toggle** permissions as needed.

### Product & Custom/Itemized Sale - Creating a Product List

1. **Log in** to iQ Pro+.

2. **Select Products** from the left navigation menu.
3. **Select Create.**
4. **Enter** the required fields:
  - Product Name
  - Commodity Code
  - Unit Price
  - Local Tax Percent
  - National Tax Percent
5. **Select Submit.**

**To delete a product:**

- **Select** the three dots menu next to the product and **select Delete Product.**

**Product & Custom/Itemized Sale - Processing an Itemized Sale within Virtual Terminal**

1. **Log in** to iQ Pro+.
2. **Select Terminal** from the left navigation menu.

**Custom Sale**

- Used for transactions without itemized products.
- Follows the standard transaction flow.

**Itemized Sale**

1. **Enter** item details or **select** products from the dropdown list.
2. **Add** additional items as needed.
3. **Select** a payment method:
  - Add Customer
  - Enter Card Information
  - Enter Bank Information
  - Select Terminal
4. **Select Submit** to complete the transaction.

**Manage Invoices**

1. **Log in** to iQ Pro+ as a gateway user and **navigate** to the **Invoices** tab.
2. **Use Global Search** to locate invoices by entering criteria such as Invoice ID, Customer Name, Amount, or other details.
3. **Select** the calendar icon to **search** invoices by **Created Date** or **Due Date**.
4. **Sort** invoices by **selecting** the arrow next to column headers (Customer Name, Amount, Due Date, and more).
5. **Select** the **Status** filter to quickly filter invoices by status.
6. Based on the invoice status, **select** the three dots menu under **Actions** to:
  1. **View Invoice**
  2. **View Invoice as PDF**
  3. **Edit Invoice**
  4. **Clone Invoice**
  5. **Cancel Invoice**
  6. **View Transactions**
  7. **Delete Invoice**
  8. **View Customer**

## Creating an Invoice

### Step 1: Select a Customer

1. **Log in** to iQ Pro+ as a gateway user and **navigate** to the **Invoices** tab.
2. **Select Create Invoice.**
3. **Enter Bill To** and **Ship To** details manually **or select Select a Customer** to choose an existing customer.
  - Bill To details will appear on the customer's invoice.
4. Under **Send invoice via**, **select Email** to send an invoice notification.
  - The billing email address will be used as the primary recipient.
  - (Optional) **Select Add CC/BCC** to include additional recipients.
5. **Select Next Step.**

## Email Notifications, Payment & Receipts

1. To send an invoice email during creation, **select Email** from **Send invoice via** in **Step 1.**

- The customer's billing email is used as the primary recipient.
  - (Optional) **Select Add CC/BCC** to include additional recipients.
2. After sending, the customer will receive an email containing:
    - An invoice summary
    - A PDF copy of the invoice
    - A **Pay Now** link
  3. **Selecting** the **Pay Now** link opens the payment page, where the customer can:
    - Review the invoice summary
    - **Enter** Card or Bank Account details (based on available payment types)
  4. Customers may **Pay In Full** or **select Pay Other Amount** to submit a partial payment.
  5. After **selecting Submit Payment**, the customer will see a confirmation screen displaying:
    - Payment amount
    - Remaining balance
    - An option to view the updated invoice as a PDF
  6. A receipt will be emailed to the customer, including transaction details and a PDF copy.
    - If the invoice is not paid in full, a **Pay Remaining Balance** link will be included.

### Creating a Subscription

1. **Navigate** to **Recurring Billing** and **select Subscriptions**.
2. **Select Create New +**.
3. **Select Select a Customer** to choose an existing customer.
  1. **Populate** required **Billing Details** fields.
  2. If shipping will be charged, **ensure Shipping Details** include **Address Line 1**, **Country**, and **State**.
4. Under **Set Up Subscription**, enter a **Subscription Name**.
  1. (Optional) **Enter** a **Subscription Number** or **Notes** for internal use.
5. Under **Billing Schedule**, **define** the billing frequency and start/end behavior.
  1. (Optional) **Adjust Trial Days** or **Billing Date** if applicable.
6. Under **Line Items**, **add** items from the product catalog or **add** a custom item.
  1. **Enter** Item Name, Item Description, Quantity, Unit Price, and Discount.
  2. (Optional) **Toggle** tax or shipping charges.
7. Under **Payment Details**, **select** automatic payments or manual invoicing.
  1. If charging automatically, **ensure a Payment Method** is saved.

2. **Enter** an **Invoice Number Prefix**, followed by a sequential count for each invoice.
3. **Define Invoice Terms.**
4. (Optional) **Add** a custom message to display on invoices.
8. **Select Save as Draft** to edit later **or Create Subscription** to activate it based on the defined schedule.

### Viewing a Subscription

1. From the **Subscriptions** page, **enter** keywords (Customer Name, Subscription Name, Subscription Number, Invoice Prefix, or Notes) into the search bar.
2. **Select** the magnifying glass icon to search.
3. **Use** the filters beside the search bar or **select All Filters** to view additional options.
  1. After entering a filter value, **select Apply** or **Show Results.**
  2. To clear filters, **select Reset.**
4. The subscription list displays subscriptions as cards, sorted by **Created Date (Descending)** by default.
  1. To change the order, **select** the sort icon, **choose** a field and order, and **select Apply.**
5. **Select** a subscription card to view its details.

### Managing a Subscription

1. From the **Subscription Details** page, **select** the three dots menu in the top-right corner.
2. **Select Edit Subscription, Pause Subscription, or Cancel Subscription.**

### Simple Pay - Create Page

1. **Log in** to iQ Pro+ as a gateway user and **navigate** to the **Simple Pay** tab.
2. **Select Create New +** in the upper-right corner.
3. Under **Theme**, **enter** a **Header Name.**
4. (Optional) **Upload** a logo and **select** page colors.
5. Under **Payment Settings**, **select** accepted payment types.
6. **Configure** Card and/or ACH settings based on desired fields.

7. **Select Save.**

**Simple Pay - Add Logo/Colors to Page**

1. **Log in** to iQ Pro+ as a gateway user and **navigate** to the **Simple Pay** tab.
2. Under **Simple Pay Templates**, **select** the desired Simple Pay page.
3. Under **Theme**, **drag and drop** the logo into the logo upload box.
4. **Select** logo alignment: **Left** or **Center**.
5. **Use** the color picker to **select** primary, background, and payment block colors.
6. **Select Save.**

**Simple Pay - Open Page or Copy URL**

1. **Log in** to iQ Pro+ as a gateway user and **navigate** to the **Simple Pay** tab.
2. **Select** the kebab menu (three dots) on the desired Simple Pay template.
3. **Select View Simple Pay Page** to open the page in a new tab.

**To copy the page URL:**

1. **Select** the copy icon above and to the right of the settings panel, **or**
2. **Select** the kebab menu (three dots) and **choose Copy Page URL.**

**Simple Pay - Delete Page**

1. **Log in** to iQ Pro+ as a gateway user and **navigate** to the **Simple Pay** tab.
2. **Select** the kebab menu (three dots) on the desired Simple Pay template.
3. **Select Delete Simple Pay Page.**
4. **Confirm** deletion by selecting **Yes, Delete Simple Pay Page!**

**Mobile App - Run a Standard Pay Transaction**

1. Tap **Make a Payment** on the home page or select **Payment** from the navigation bar.
2. Select the **Standard Pay** header.
3. Specify the transaction type and amount.

4. Add the payment method (Credit Card or Bank Account) and select the appropriate processor. \*For credit cards you can scan the card data by selecting **Scan Card** or manually entering it.
5. Add any adjustments to the payment. You can select percentage or exact amount.
6. Add taxes to the transaction by selecting **Add Tax to Total** to add a flat percentage or selecting **Tax Override** and specifying a specific amount. Select **Tax Exempt** for tax exempt transactions.
7. Tap the **Next** button.
8. Specify the transaction details in the **Transaction Details** section.
9. Enter **Billing Address** and enter or skip **Shipping Address**.
10. Tap the **Next** button.
11. Tap **Pay Total** to process the payment.
12. To send a receipt with the transaction specify an email in the **Email** textbox and click the **Send Receipt** button.

#### **Mobile App - Run a Quick Pay Terminal Transaction**

1. Tap **Make a Payment** on the home page or select Payment from the navigation bar.
2. Select Quick Pay.
3. Specify the amount.
4. Tap the Payment Method dropdown, then select Terminal. \*This option is only available if there are physical terminals configured on the gateway.
5. Tap Terminal to select terminal to send the payment to. \*Online terminals will be listed as Available.
6. Select **Tax Exempt** for tax exempt transactions. \*The tax and payment adjustment values configured for the gateway will automatically applied to the transaction.
7. Tap **Pay Total**.
8. Customer will be prompted on terminal to present their card and complete the payment.
9. To send a receipt with the transaction specify an email in the Email textbox and tap the **Send Receipt** button.

#### **Mobile App - View Transaction**

1. Tap **Transactions** on the navigation bar.
2. Select a transaction from the **Transaction List**.

3. From here, you can view the details of a transaction. You can select the **Address** tab or the **Payment** tab to view the billing and shipping information and the payment method associated with the transaction, respectively.
4. You can also send a receipt via email. If an email was already specified when you ran the transaction, click **Email Receipt** to send a receipt to that email. If you want to add a new email specify it in the text box and click **Email Receipt**.

#### **Mobile App - Void Transaction**

1. Tap **Transactions** on the navigation bar.
2. Select a transaction from the **Transaction List**.
3. Tap the **Void/ Refund** button. \*The option to either void or refund will depend on transaction settlement status.
4. The transaction status will update once the action is completed.

#### **Mobile App - Create Customer**

1. Tap **Add a Customer** on the home page or select the + icon while in the Customers tab.
2. Add Customer name and a description (optional) under Customer Details.
3. Under Add Payment Method, specify credit card information, bank account information or no payment method. \*For credit cards you can scan the card data by selecting **Scan Card** or manually entering it.
4. Enter Billing and Shipping Addresses or select 'Skip' checkbox.
5. Tap **Add Customer**.

#### **Mobile App - Edit Customer**

1. Tap **Find a Customer** on the home page or select **Customer** from the navigation bar.
2. Tap the pencil icon next to the customer you want to edit.
3. Edit the customer's name and description and tap **Update Details**.
4. To add an address, select the **Addresses** section and tap the + icon. Specify the address and tap **Add Address**.

5. To add a payment method, select the **Payment Methods** section and tap the **+** icon. Specify the payment method and tap **Add Payment Method**. \*For credit cards you can scan the card data by selecting **Scan Card** or manually entering it.

#### **Mobile App - Pay with Existing Customer**

1. Tap **Find a Customer** on the home page or select **Customer** from the navigation bar.
2. Search for the desired customer and tap **Pay Now**.
3. Fill out the payment information. If the customer already has a payment method associated with them, you can select it from the **Select a Payment Method** dropdown. \*For credit cards you can scan the card data by selecting **Scan Card** or manually entering it.
4. Tap the **Next** button.
5. Fill out all the transaction details and billing and shipping information. If the customer already has an address associated with them, you can select it from the **Select an Address** dropdown in the **Billing Address** and **Shipping Address** sections.
6. Tap the **Next** button.
7. Tap **Pay Total**.
8. To send a receipt with the transaction, select the **Send Receipt** checkbox and specify an email in the **Email** textbox.

#### **Mobile App - Switch Customer**

1. Tap the gear icon in the upper right corner of the home page to access **Settings**.
2. In the **Settings Menu**, you will see all the gateways you are associated to under the **Switch Gateway** section.
3. Select the gateway you want to switch to and click **Switch Gateway**.

#### **Mobile App - Log In with Biometrics**

1. Upon logging in for the first time to the iQ Pro mobile app, specify your login credentials and a pop-up window will appear asking to enable biometric login. Tap **Yes** to enable or **No** to disable.

2. If you tapped **Yes** your operating system will launch a pop-up window to grant access to utilize biometric login. Tap **Allow** to enable or **Don't Allow** to disable. If this is enabled, it will use biometrics the next time you log in.
3. Click the gear icon in the upper right corner of the home page to access Settings.
4. In the **Settings Menu**, you will see a toggle labeled **Log In Using Biometrics**. The app will honor whatever the toggle is set to the next time you log in.

#### Mobile App - Enable/Disable Card Scan

1. Click the gear icon in the upper right corner of the home page to access **Settings**.
2. In the **Settings Menu**, you will see a toggle labeled **Allow card scan**. Toggle this setting on or off to enable or disable the card scan feature.
3. Upon toggling on this feature a pop-up window will be displayed prompting you to grant access to the devices camera. Click **Allow** to enable or **Don't Allow** to disable. This pop-up will appear if you select the **Card Scan** option in the **Run a Transaction, Create Customer, Edit Customer, or Pay with Existing Customer** workflows before enabling or disabling through the toggle.

## Frequently Asked Questions

#### How do I log into iQ Pro+?

You can log into iQ Pro+ [here](#).

#### How do I reset my password?

If you have forgotten your login credentials, please utilize the “Forgot your password?” links on the [login page](#).

#### How can I access iQ Pro+

iQ Pro is available on any device with access to a web browser, and will utilize the native connectivity of that device (Internet, WiFi, Cellular, etc.)

**What transaction types does iQ Pro+ support?**

iQ Pro+ supports Sales, Pre-Authorizations, Card Verifications, Full and Partial Refunds and Blind Credits.

**Why did my transaction decline?**

Transactions are approved or declined by the issuing bank of the card. iQ Pro+ will display the full, detailed transaction response that includes the decline code from the issuer. Please contact us if you need more information on a transaction status.

**Can I import my customer data into iQ Pro+?**

In many cases, iQ Pro+ can accept an import of customer data (including secured payment data) from other gateways and software. Please [contact us](#) for more information.

**How can I export my transactions for reporting?**

iQ Pro+ supports export of transaction reporting through the universal format of a CSV file for easy upload into other software for reporting and reconciliation purposes.