iQ Pro

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Overview

Add a Product to an Invoice

1. From the Invoices drop-down menu, choose **Create**.
2. On the **Invoice Creation** page, enter the customer and invoice number.
3. Under the **Bill To** section, select **Require Billing Only on Payment**.
4. Next, clear any pending line items.
5. Click on **Add Existing Product** to view, search, and select from saved products to add to your invoice.
6. You can search using Product ID, Price, Name, and Date Created/Updated.
7. Select a product to add it to the invoice.
8. On the **Invoice Creation** page, you also have the option to add a message for the customer.
9. If appropriate, set **Allow Partial Payments** to **None**.
10. Adjust other **Options** settings as needed.
11. Click **Create Invoice**.
12. You will then be taken to the **Invoices Search** page.
13. Click the three dots under **Actions** column, then **Edit Invoice**, on the invoice you have created to edit any details.
14. Click the three dots under **Actions** column, then **View Invoice**, to view the customer's invoice.
15. The Products you have added appear as line items on the invoice with their descriptions and details.

Create A Custom Report

1. From the dashboard on the left, select **Settings**.

2. From the top menu, select **Custom Outputs**.
3. Then select **Create New**.
4. On the **Select Type** drop down menu, choose **Transaction**.
5. Then click **Create**.
6. You can type in a name for the report.
7. Then select the fields you would like in your report by dragging and dropping from the **Available Fields** section, to the **Selected Fields** section.
8. The items will appear in the order that you drag and drop them into the **Selected Fields** section.
9. The items can also be re-arranged once they are in the **Selected Fields** section, by dragging and placing the selected item on top or below any of the other selected fields.
10. You can also remove an item from the **Selected Fields** section, by dragging and dropping the item back into the **Available Fields** section.
11. Once you have the desired fields selected, click the **Create** button at the bottom.
12. From the top menu, select **Custom Outputs**.
13. Then select **Create New**.
14. On the **Select Type** drop down menu, choose **Transaction Table**.
15. Then click **Create**.
16. You can type in a name for the report.
17. Same as with the other report, select the fields you would like in your report by dragging and dropping from the **Available Fields** section, to the **Selected Fields** section.
18. The fields will appear in the order that you drag and drop them and can be re-arranged by dragging.
19. Once you have the desired fields selected, click the **Create** button at the bottom.

Create a Customer Vault Record

1. Select **Customer Vault** from the left-hand menu bar.
2. Select **Create**.
3. Choose which payment option you would like to save for the customer.
4. Enter the customer’s card number and expiration date.
5. If you choose, enter a custom ID, description, and a default credit card processor.
6. Enter any customer billing information.
7. If you choose, enter the customer’s shipping information.
8. Click **Create**.

Create a New User

1. From the left-hand options menu, click **Users** in the **Manage** menu.
2. Then click **Create New User**.
3. Enter the fields for the user profile according to the following guidelines:
    1. Username: a unique name for the user
    2. Name: the first and last name of the user
    3. Email: the user's email address
    4. Role: the user's role, either Standard or Admin
    5. Default Processer. Select one of the processors listed. Please note that the default processor cannot be listed as none.
4. Click **Create**.

Create a Saved Product

1. From the **Shopping** drop-down menu, choose **Products**.
2. Click **Create** new product.
3. Enter any product details within the applicable fields.
4. When finished with your product details, click **Create** product.

Create a Shopping Cart

1. To enable the **Shopping Cart** feature and for additional details, please contact Customer Support.
2. After Shopping Cart is enabled, select **Shopping** from the left-side menu.
3. Select **Carts** from the drop-down Shopping menu.
4. Click **Create New Cart**.
5. Fill in the fields accordingly.
6. Click **Create**.
7. After creating a cart, create your products.
8. Select **Products** from the drop-down Shopping menu.
9. Click on **Create New Product**.
10. Fill in the applicable fields.
11. Add a product image or logo if applicable.

12. Click **Create Product**.
13. Once you have created your products, add the products to the shopping cart.
14. To add the product(s), select **Carts** from the drop-down Shopping menu.
15. Click on the three dots under **Action** column, then **Edit Cart**, to the cart to which you want to add products.
16. Under the **Products** section, select products to add to the shopping cart.
17. Select products from the list to add to the cart.
18. Once you have added products, click on **Update**.
19. To view the cart, three dots under **Action** column, then **View Cart**, this will redirect you to the iQ Pro hosted shopping cart landing page.
20. To add a cart to a website, select **Documentation** from the drop-down Shopping menu.
21. You will be redirected to the **Hosted Shopping Cart** page. This page will provide you with all the information you need for adding a Shopping Cart and Products to your website.
22. Additionally, you can find your shopping cart URL by following the steps for viewing your shopping cart and then copying the URL at the top of the browser.

Create Recurring Billing

1. Select **Recurring Billing** from the left-hand menu.
2. Select **Plans**.
3. Then, select **Create New Plan**.
4. Fill in the plan details according to the plan that you would like to setup.
5. Enter a name for the plan.
6. Enter the amount.
7. Enter a description.
8. Select the billing cycle.
9. Choose the bill option and day in the month to bill.
10. Select when the plan ends.
11. You can add create **Add-ons** or **Discounts** if applicable.
12. To select an existing Add-on, select **Add Add-on**.
13. Or, to create a new Add-on, select **Create Add-on**.
14. Press **Create** to save and add the Add-on.
15. To select an existing discount, select **Add Discount**.
16. Or, to create a new discount, select **Create Discount**.
17. Enter the discount name, discount percentage, and discount duration.

18. Press **Create** to save and add the discount.
19. Once you have setup the plan, press **Create** to save the plan.
20. The plan will show under the **Recurring Billing Plans** list.
21. Once you create a plan, you can now subscribe a customer to that plan by adding a subscription to a customer vault record.
22. Select **Customer Vault** from the left-hand menu, then select **Search**.
23. Find the customer that you will be subscribing to the recurring billing plan.
24. Click the three dots under **Actions** column, then select **Edit Customer** to open the customer details.
25. Select the **Subscriptions** tab.
26. Click **Create New Subscription**.
27. Click the Plan drop-down and select the recurring billing plan for this customer.
28. In addition, you can adjust the details within the subscription if needed.
29. When finished, press **Save Subscription** to save to this customer.
30. After the subscription is saved, you'll see the subscription details under the subscription tab of the customer's record.
31. Lastly, select **Recurring Billing** from the left-hand menu and then select **Subscriptions**.
32. You can also click the three dots under Actions column, then **View Subscription** to view more details of the subscription.

Find a Transaction

1. Click on Transactions in the **Reporting** menu.
2. From the **Search Options** drop-down, select the appropriate Search Options (e.g. Amount, Created Date, Last Name) for the transactions you want to find.
3. Enter the search criteria.
4. Click **Search**.
5. Click the three dots under **Actions** column, then select **View Transaction**.
6. You may choose to refund the transaction, view the printable transaction details, email a receipt, or save the customer's information to the vault.

Find Customer in Vault

1. Click on **Search** in the **Customer Vault** menu.

2. From the **Search Options** drop-down, select the appropriate Search Options (e.g. Last Name, Company) for the customer you want to find.
3. Enter the search criteria. **Click Search**.
4. Select the customer by clicking the three dots under **Actions** column, then **Edit Customer**.
5. You may then add or delete a Payment Method, edit an Address, or Charge the Customer.

Refund a Transaction

1. Click on Transactions in the Reporting menu.
2. From the Search Options drop-down, select the appropriate Search Options (e.g. Settled Date, Amount Settled) for the transactions you want to refund. Enter the search criteria. Click Search.
3. Select the transaction you want to refund by clicking the three dots under **Actions** column, then **View Transaction**.
4. Click Refund.
5. Enter the refund amount if the amount is different than the original transaction amount.
6. Click Process.

Run a Card-Not-Present Sale

1. Select **Virtual Terminal** from the left-side menu.
2. Select **Sale** from drop-down at the top of the Virtual Terminal screen.
3. Enter **Amount**.
4. Enter **Card Number** and **Expiration** date. A CVC is recommended, but optional.
5. Click on the section headers on the right to expand the **Details**, **Billing Contact**, and **Shipping Contact** sections to enter additional transaction information as desired for security and reporting.
6. Click **Submit**.
7. Once the transaction has processed, you will be taken to **Transactions Detail**.
8. Confirm the authorization response is approved.
9. You may choose to view the printable transaction details, email a receipt, or save the customer’s information to the vault.

Run a Card Present Transaction with an EMV Reader

1. Select Virtual Terminal from the left-side menu.
2. Select Sale from the drop-down at the top of the Virtual Terminal screen.
3. Enter Amount.
4. Select Terminal tab.
5. Click Submit.
6. When the terminal “wakes up,” advise your customer to dip card, or hold smartphone within a few centimeters of the terminal to pay with digital wallet.
7. Once the transaction has processed, you will be taken to Transactions Detail. Confirm the authorization response is approved.
8. You may choose to view the printable transaction details or email a receipt.

Run a Card Present Transaction with a Card Reader*

1. Select **Virtual Terminal** from the left-side menu.
2. Select **Sale** from the drop-down at the top of the **Virtual Terminal** screen.
3. Enter **Amount**.
4. Click into the **Card Number** field.
5. Swipe the card using the card reader. The card number, expiration date, and cardholder information will populate in the corresponding fields of the virtual terminal.
6. Click **Submit**.
7. Once the transaction has processed, you will be taken to **Transactions Detail**.
8. Confirm the authorization response is approved.
9. You may choose to view the printable transaction details or email a receipt.

*This feature is only available for certain account setups, please contact iQ Pro support at (888) 366-1325 to learn more.

Run a Sale from the Customer Vault

1. Click Search under **Customer Vault** from the left side menu.
2. From the **Search Options** drop-down, select the appropriate Search Options for the customer you want to find.

3. Enter the search criteria.
4. Click **Search**.
5. Click the three dots under **Actions** column, then select **Charge Customer** to be taken to the Virtual Terminal, populated with the customer's information.
6. Enter the **Amount**, and any additional transaction information as desired for security and reporting.
7. Click **Submit**.
8. Once the transaction has processed, you will be taken to **Transactions Detail**.
9. Confirm the authorization response is approved.

Save a Customer to the Vault After a Card-Not-Present Sale

1. Run a **Sale**, making sure to enter any **Billing and Shipping Contact** information that you want stored in the vault record.
2. Once the transaction has processed, you will be taken to **Transactions Detail**.
3. Confirm the authorization response is approved.
4. Click **Vault**.
5. Click **Process** to verify you want to save the customer's information to the vault.
6. Click **Search** under the drop-down **Customer Vault** menu.
7. Select the filters you would like to apply to the customer search from the **Filter Search Options** drop-down menu.
8. Click **Search**.
9. The customer vault record will show up on the proceeding page.

View or Download a Custom Report

1. From the dashboard on the left, select **Reporting** then **Transactions**.
2. Under **Table Format**, select the name of the custom report you want to view.
3. To take the additional step of downloading the report, select the **Download** as CSV button at the bottom.
4. On the **Select Format** drop down menu, choose the name of the **Transaction Table** report that you created.
5. Then click **Download**.
6. This will download the report as an Excel CSV file.

View Settlements

1. Click on **Settlements** in the **Reporting** menu.
2. From the **Search Options** drop-down, select **Batch Date**.
3. Select a date, or date range, on the calendar for the settlements you want to view.
4. Click **Search**.
5. Under the **Results** section, click the magnifying glass under the **Action** column to view transactions in the settlement.

Void a Transaction*

1. Click on **Transactions** in the **Reporting** menu.
2. Find the transaction you want to void.
3. Click the three dots under **Actions** column, then **View Transaction** to open the transaction details.
4. Click **Void**.
5. Click **Void to Confirm**.
6. The transaction will void and the transaction details will update accordingly.

*This feature is only available for certain account setups, please contact iQ Pro support at (888) 366-1325 to learn more.

Protect

1. Navigate to **iQ Protect** on righthand menu.

   a. Click **Configuration.**

2. Click **Create Rule.**

3. Under General Configuration:

   a. Add **Name** for ruleset (required).

   b. Add **Description** (optional).

c. Add **Whitelisted IPs** (optional).

i. These IP addresses will be excluded from the ruleset.

d. Add **Processors** (required).

4. Under **Pre Rules**:

a. Add desired rules by clicking **blue plus sign button.**

i. Add operator and action to rule.

1. Deny will decline transaction.

2. Accept will allow transaction.

3. Flag will alert user to transaction.

b. Hover over Info icon to view description of rule.

i.For more information on pre rule definitions, call customer support at (888) 366-1325.

c. Note: Pre Rules will run pre-authorization and will *decline* transactions

5. Under **Post Rules**:

a. Add desired rules by clicking **blue plus sign button.**

i. Add operator and action to rule.

1. Deny will void transaction.

2. Accept will allow transaction.

3. Flag will alert user to transaction.

b. Hover over Info icon to view description of rule.

i. For more information on post rule definitions, call customer support at (888) 366-1325.

c. Note: Post Rules will run post-authorization and will *void* transactions.

6. Once satisfied with ruleset, click **Create** at the bottom of the page.