iQ Pro

iQ Pro - Quick Reference Guide

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. Confirm the authorization response is approved.
8. 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 a Card Reader*

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. Select Terminal tab.
5. Click Submit.
6. When the terminal "wakes up," advise your customer to swipe 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.

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

Run a Card Present Transaction with a EMV Reader*

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. 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.

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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 blue info icon.
4. Click Refund.
5. Enter the refund amount if the amount is different than the original transaction amount.
6. Click Process.

Void a Transaction*

1. Click on Transactions in the Reporting menu.
2. Find the transaction you want to void.
3. Click into the transaction.
4. Click Void and accept.

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Save Customer to Vault After 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. Click Vault.
3. Click Process to verify you want to save the customer's information to the vault

Create Customer in Vault

1. Click on Create in the Customer Vault menu.
2. Enter Card Number and Expiration date.
3. Enter any Billing and Shipping Contact information that you want stored in the vault record.
4. Click Create.

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. Enter the search criteria. Click Search.
3. Select the customer by clicking the blue info icon.
4. You may add or delete a Payment Method, edit an Address, or Charge the Customer.

Run a Sale from Vault

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. Select Token tab.
4. Click Customer Search.
5. From the Search Options drop-down, select the appropriate Search Options (e.g. Last Name, Company) for the customer you want to find. Enter the search criteria. Click Search.
6. Select the customer by clicking the blue info icon.
7. Click Charge to be taken to the Virtual Terminal, populated with the customer's information.
8. Select card to charge from Payment Option drop-down, and Billing and Shipping Addresses from drop-downs, if applicable.
9. Enter Amount, and any additional transaction information as desired for security and reporting.
10. Click Submit.

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 blue info icon to view Transactions Detail.
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.

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 view.
4. Click Search.
5. Click See Transactions to view transactions in the settlement.

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