

Virtual Terminal

Reference Guide

Use the Gift Virtual Terminal to access gift card transaction reporting, issue and redeem cards, and manage user access.

Online access

1. Requires Internet Explorer© 6.0 or higher
2. Pop-up blocker must be disabled
3. Login at **www.MyOnlineReports.com**
4. User name and password to be provided

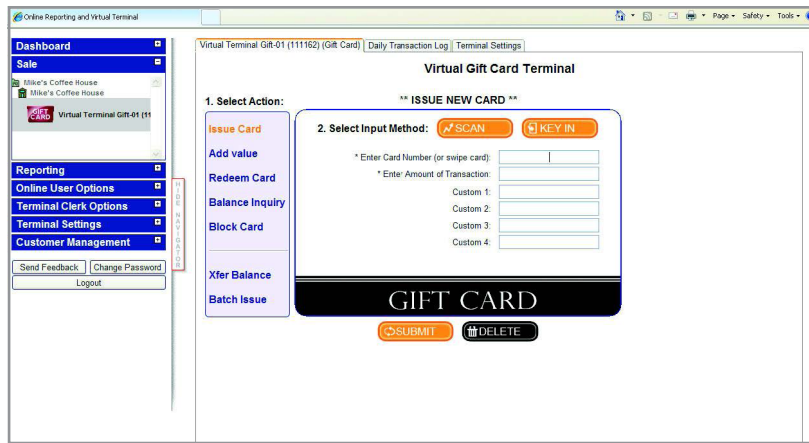
Virtual terminal features

- **Dashboard** – graph of recent activity statistics
- **Sale** – manage cards, daily transaction log, view terminal settings
- **Reporting** – various reports available to easily access transaction history according to specific needs
- **Online User Options** – add, modify, or delete online users
- **Terminal Clerk Options** – add, modify, or delete clerks
- **Terminal Settings** – manage terminal's optional custom fields
- **Customer Management** – see and manage customers who have chosen to go online and register their card

Key Functions:

Sale

1. **Select Action:** click on an action from the available list
 - Issue Card
 - Add Value
 - Redeem Card
 - Balance Inquiry
 - Block Card
 - Transfer Balance
 - Batch Issue Cards



2. **Select Input Method:** click on “scan” if using a card reader or “key in” to manually enter data
3. **Submit or Delete to complete action**

Daily transaction log:

1. Access the log by clicking the Virtual Terminal in the Sale section
2. Click on the Daily Transaction Log tab (at top of screen)
3. Provides a list of today’s transactions
4. To void a transaction, click the “void” button next to the transaction.
Only transactions for the current day may be voided.

Reporting:

1. Select the desired report, enter report parameters, modify columns if desired, and click “view report”.

Available reports include:

- Gift Clerk Transaction Summary
- Gift Daily Transaction Detail
- Gift Daily Transaction Summary
- Gift Issuance Detail
- Gift Issuance Summary
- Gift Redemption Detail
- Gift Redemption Summary

Online Reporting and Virtual Terminal

Parameters Columns Report

Gift Daily Transaction Detail (Records: 7)

Click below to save as...

Date	Card Number	Amount	Auth Code	Type	Location ID	Location	Terminal	Clerk
07/10/2011 10:26 AM	0930000000000001	\$100.00	Approved	Issuance	30	Mike's Coffee House	111162	1
07/10/2011 10:26 AM	0930000000000005	\$75.00	Approved	Issuance	30	Mike's Coffee House	111162	1
07/10/2011 10:26 AM	0930000000000009	\$50.00	Approved	Issuance	30	Mike's Coffee House	111162	1
07/10/2011 10:26 AM	0930000000000005	\$25.45	Approved	Redemption	30	Mike's Coffee House	111162	1
07/10/2011 10:26 AM	0930000000000001	\$35.28	Approved	Redemption	30	Mike's Coffee House	111162	1
07/10/2011 10:26 AM	0930000000000005	\$0.00	Approved	BalanceInquiry	30	Mike's Coffee House	111162	1
07/10/2011 10:26 AM	0930000000000009	\$25.00	Approved	AddValue	30	Mike's Coffee House	111162	1

Excel CSV PDF XML

Online User Options
Terminal Clerk Options
Terminal Settings
Customer Management

Send Feedback Change Password Logout

2. Reports may be saved as Excel, CSV, PDF, or XML.

Online user options:

Users designated as online users have access to various reports and settings.

1. Manage online user access by selecting:

- Add User
- Edit User
- Delete User

2. Complete the required fields and click on desired access for that user.

3. The “admin user” has the ability to manage users and can designate other users.

4. Online User does not provide access to run or manage transactions. Use the Terminal Clerk Options to designate transaction management access.

Terminal clerk options:

Users designated as clerks have access to run transactions.

1. Manage clerk options by selecting:

- Add Clerk
- Edit Clerk
- Delete Clerk

Online Reporting and Virtual Terminal

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Clerk Add Clerk Edit Clerk Delete

Click Clerk to Edit:

Level: Merchant
Entity: Mike's Coffee House
Clerk: Mike Smith

First Name: Mike
Last Name: Smith
ClerkID: 1

Set Security Access

☒ Allows Issuing of Gift Cards
☒ Allows deducting value from Card Balance
☒ Allows Adding value to Gift Card
☒ Allows moving the balance of one Gift Card to another

☒ Allows Bulk Issuing of Gift Cards
☒ Allows Viewing of Card Balances
☒ Allows the voiding of last Gift Card transaction
☒ Allows Blocking the processing of a Gift Card

Set Report Access

☐ Clerk Reports
☐ Terminal Reports

Save Changes

In need of assistance?

Live online chat support is available right from within the Virtual Terminal. Just click the Live Support icon to be connected to a support agent.

or contact support

phone: 1 888.481.0757