

# Retail Application

## Quick Reference Guide



VeriFone® VX 520 Series

## Color Key

Required Merchant Input on Point of Sale

Required Cardholder Input on Point of Sale or External PIN Pad

Optional Merchant Prompts on Point of Sale

## Credit Sale

> Select **[SALE]**

### Optional Clerk ID Prompt:

> Input Clerk ID and press **[ENTER]**

> Input amount and press **[ENTER]**

> If prompted, select **[YES]** or **[NO]** to confirm amount

- If **[NO]** is selected, press **[CLEAR]** to end transaction

> Swipe or tap card

> Select **[CREDIT]**

> Input last 4 digits of card # and press **[ENTER]**

### Optional Invoice Prompt:

> Input Invoice # and press **[ENTER]**

### If Purchasing, Business, or Commercial card:

> Input Customer # and press **[ENTER]**

> Input Tax Amount and press **[ENTER]**

> Select **[YES]** or **[NO]** to print Customer receipt copy

> If prompted "Amt Exceeds Bal - Amt Authorized \$XX.XX, Balance Due \$XX.XX, Continue?" select **[YES]** and collect remaining amount due with another form of payment or **[NO]** to reverse the authorization and cancel the transaction.

## Debit Sale

> Select **[SALE]**

### Optional Clerk ID Prompt:

> Input Clerk ID and press **[ENTER]**

> Input amount and press **[ENTER]**

> If prompted, select **[YES]** or **[NO]** to confirm amount

- If **[NO]** is selected, press **[CLEAR]** to end transaction

> Swipe or tap card

> Select **[DEBIT]**

### Optional Cash Back Prompt:

> Select **[YES]** or **[NO]** for Cash Back

> If **[YES]** is selected, choose Cash Back Amount

> Cardholder enters PIN and presses **[ENTER]**

### Optional Invoice Prompt:

> Input Invoice # and press **[ENTER]**

> Select **[YES]** or **[NO]** to print Customer receipt copy

> If prompted "Amt Exceeds Bal - Amt Authorized \$XX.XX, Balance Due \$XX.XX, Continue?" select **[YES]** and collect remaining amount due with another form of payment or **[NO]** to reverse the authorization and cancel the transaction.

## Manual Sale

> Select [SALE]

### Optional Clerk ID Prompt:

- > Input Clerk ID and press [ENTER]
- > Input amount and press [ENTER]
- > If prompted, select [YES] or [NO] to confirm amount
  - If [NO] is selected, press [CLEAR] to end transaction
- > Manually input Account # and press [ENTER]
- > Input expiration date and press [ENTER]
- > Select [YES] or [NO] to indicate if card is present
- > If [YES] is selected, imprint card and press [ENTER]

### Optional Invoice Prompt:

> Input Invoice # and press [ENTER]

### If Purchasing, Business, or Commercial card:

- > Input Customer # and press [ENTER]
- > Input Tax Amount and press [ENTER]
- > Input V-Code and press [ENTER]
  - If V-Code entry is bypassed, select [NO] if V-Code is not present
  - OR
  - [X READ] if V-Code is present but cannot be read

> If prompted, input Street Address and press [ENTER]

> If prompted, input Zip Code and press [ENTER]

- > Select [YES] or [NO] to print Customer receipt copy
- > If prompted "Amt Exceeds Bal - Amt Authorized \$XX.XX, Balance Due \$XX.XX, Continue?", select [YES] and collect remaining amount due with another form of payment or [NO] to reverse the authorization and cancel the transaction.

## Credit Refund

**If desired selection is not displayed, press key below [↓] until option appears**

> Select [REFUND]

> If prompted, input password and press [ENTER]

### Optional Invoice Prompt:

> Input Invoice # and press [ENTER]

### Optional Clerk ID Prompt:

- > Input Clerk ID and press [ENTER]
- > Input amount and press [ENTER]
- > Swipe, tap or manually input account number and press [ENTER]
- > Select [CREDIT]
- > If swiped or tapped, input last 4 digits of card # and press [ENTER]
- > If manually keyed, enter expiration date and press [ENTER]
- > If manually keyed, imprint card and press [ENTER]

### If Purchasing, Business, or Commercial card:

- > Input Customer # and press [ENTER]
- > Input Tax Amount and press [ENTER]
- > Select [YES] or [NO] to print Customer receipt copy

## Reprint

- > Press [REPRINT]
- > Select [LAST] or [ANY]
- > If [LAST] is selected:
  - The last receipt prints
- > If [ANY] is selected:
  - Input Invoice # and press [ENTER]
  - Requested Merchant receipt copy prints
- > Select [YES] or [NO] to print Customer receipt copy

## Reports

- > Press [REPORTS]
- > Select from displayed reports or press key below [↓] until option appears
- > Select the desired report
- > If displayed, respond to additional prompts
- > Selected report will print

## Balance Inquiry

**If desired selection is not displayed, press key below [↓] until option appears**

- > Select [BALANCE INQ]
- > Select [CURR] for current batch detail or [PREV] for previous batch detail
- > Report for selected batch inquiry prints

## Balance Totals

**If desired selection is not displayed, press key below [↓] until option appears**

- > Select [BATCH TOTAL]
- > Select [SLCT]
- > Batch totals will display
- > Select [CLEAR] to exit

## Batch Review

**If desired selection is not displayed, press key below [↓] until option appears**

- > Select [BATCH REVIEW]
- > If prompted, input password and press [ENTER]
- > Select [SRVR], [AMT], [ACCT], or [INV#] to search batch
- > Input (Server ID, Amount, last 4 digits of Account #, or Invoice #) and press [ENTER]
- > Select [ADJ] to adjust transaction displayed and follow additional prompts
- > Select [VOID] to void transaction displayed and follow additional prompts
- > Select [PREV] to go to the previous transaction in the batch
- > Select [NEXT] to go to the next transaction in the batch
- > Select [CLEAR] twice to exit

## Settlement

**If desired selection is not displayed, press key below [↓] until option appears**

- > Select [SETTLEMENT]
- > If prompted, input password and press [ENTER]
- > Totals will display
- > Confirm totals and press [ENTER]
- > Settlement report prints

## Manual Sale For ECI

Available only for the internet industry.

> Select [SALE]

### Optional Clerk ID Prompt:

- > Input Clerk ID and press [ENTER]
- > Input amount and press [ENTER]
- > If prompted, select [YES] or [NO] to confirm amount
  - If [NO] selected, press [CLEAR] to end transaction
- > Manually input Account # and press [ENTER]
- > Input expiration date and press [ENTER]
- > Select [NO] to indicate card not present
- > Select [WEB]

### Optional Invoice Prompt:

> Input Invoice # and press [ENTER]

### If Purchasing, Business, or Commercial card:

- > Input Customer # and press [ENTER]
- > Input Tax Amount and press [ENTER]
- > Input V-Code and press [ENTER]
  - If V-Code entry is bypassed, select [NO] if V-Code is not present OR
  - [X READ] if V-Code is present but cannot be read

> If prompted, input Street Address and press [ENTER]

> If prompted, input Zip Code and press [ENTER]

> Select [YES] or [NO] to print Customer receipt copy

## Force

**If desired selection is not displayed, press key below [↓] until option appears**

- > Select [FORCE]
- > Swipe or manually input Account # and press [ENTER]
- > Select [CREDIT]
- > Input last 4 digits of card # and press [ENTER]
- > If manually keyed, enter expiration date and press [ENTER]
- > Select [SALE] or [PHONE]
  - If [SALE] selected, imprint card and press [ENTER]

### Optional Invoice Prompt:

> Input Invoice # and press [ENTER]

### If Purchasing, Business, or Commercial card:

> Input Customer # and press [ENTER]

### Optional Clerk ID Prompt:

- > Input Clerk ID and press [ENTER]
- > Input amount and press [ENTER]

### If Purchasing, Business, or Commercial card:

- > Input Tax Amount and press [ENTER]
- > Input approval code and press [ENTER]
- > Select [YES] or [NO] to print Customer receipt copy

## Authorization Only

If desired selection is not displayed, press key below [↓] until option appears

> Select [AUTH ONLY]

### Optional Invoice Prompt:

> Input Invoice # and press [ENTER]

### Optional Clerk ID Prompt:

> Input Clerk ID and press [ENTER]

> Input amount and press [ENTER]

> If prompted, select [YES] or [NO] to confirm amount

- If [NO] is selected, press [CLEAR] to end transaction

> Swipe, tap or manually input account number and press [ENTER]

> Select [CREDIT]

> Input last 4 digits of card # and press [ENTER]

> If manually keyed, enter expiration date and press [ENTER]

### If Purchasing, Business, or Commercial card:

> Input Customer # and press [ENTER]

> Select [YES] or [NO] to print Customer receipt copy

## Card Balance Inquiry

If desired selection is not displayed, press key below [↓] until option appears

> Select [CARD BAL INQ]

> Select card type

### Optional Clerk ID Prompt:

> Input Clerk ID and press [ENTER]

> Swipe, tap or manually input account number and press [ENTER]

> On Debit inquiry, Cardholder enters PIN and presses [ENTER]

> Card inquiry receipt will print

## Cash Receipt

> Press [9]

### Optional Clerk ID Prompt:


> Input Clerk ID and press [ENTER]

> Input amount and press [ENTER]

> Cash receipt prints

## Processing Tips

 = Enter or Yes

 = Backspace

 = Cancel or No

> To scroll through the menu, press [MORE]

> Press [3] multiple times until the paper advances to desired length

## Mail/Telephone Order

If desired selection is not displayed, press key below [↓] until option appears

- > Select [PHONE ORDER]
- > Manually input Account # and press [ENTER]
- > Input expiration date and press [ENTER]

### Optional Invoice Prompt:

- > Input Invoice # and press [ENTER]

If Purchasing, Business, or Commercial card:

- > Input Customer # and press [ENTER]

### Optional Clerk ID Prompt:

- > Input Clerk ID and press [ENTER]

- > Input amount and press [ENTER]

If Purchasing, Business, or Commercial card:

- > Input Tax Amount and press [ENTER]
- > Input V-Code and press [ENTER]
  - If V-Code entry is bypassed, select [NO] if V-Code is not present  
OR
  - [X READ] if V-Code is present but cannot be read
- > Input Street Address and press [ENTER]
- > Input Zip Code and press [ENTER]
- > Select [YES] or [NO] to print Customer receipt copy

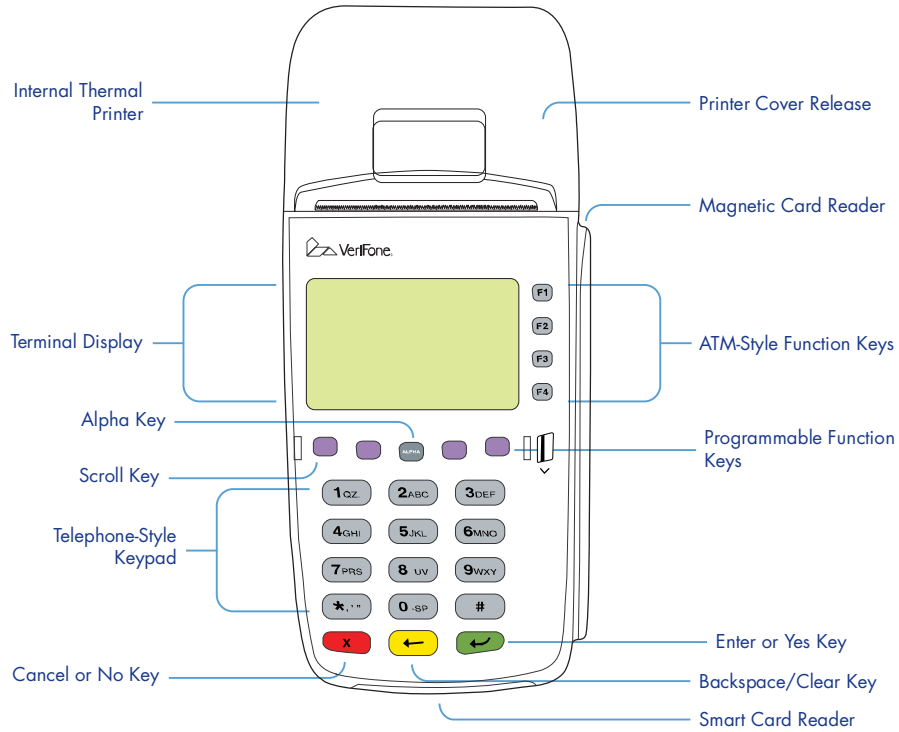
## Void

If desired selection is not displayed, press key below [↓] until option appears

- > Select [VOID]
- > If prompted, input password and press [ENTER]
- > Select [YES] or [NO] to Void last transaction
- > If [YES] is selected, proceed to next step
  - If desired transaction is displayed, select [YES]
- > If [NO] is selected, proceed to next step
  - Select [INV#] or [ACCT#] to search transactions
  - Input (Invoice # or last 4 digits of Account #) and press [ENTER]
  - If desired transaction is displayed, select [YES]
  - If desired transaction is not displayed, select [NEXT] to review other transactions or [NO] to exit Void menu
- > Select [YES] or [NO] to print Customer receipt copy



## Terminal Key Pad Display



## MerchantConnect

The Online Window To Your Payment Processing Account

MerchantConnect is your one-stop destination for online customer service. It contains everything you need to manage your electronic payment activity.

Getting Started Is: Fast, Easy, Secure & Free!

Go to [www.MerchantConnect.com](http://www.MerchantConnect.com)