Virtual Terminal Transaction Fields

Last Modified on 08/13/2024 6:52 pm PDT

Field	Description
Transaction Type (Required)	Transaction types include Authorization, Sale, Credit, and Force.
Payment Profile	Qualpay Payment Profile. This field will not appear if you only have one payment profile.
Transaction Subtotal (Required)	This field appears when using a Transaction Fee (Surcharge, Convenience Fee, etc). Put the amount of the transaction without the fee into this field.
Transaction Fee (Surcharge, Convenience Fee, etc) - (Optional)	This field appears when using a Transaction Fee (Surcharge, Convenience Fee, etc). Qualpay will calculate the Transaction Fee and Transaction Total based on the fee configured in your Payment Profile. You may set the fee to less than the calculated amount or zero if you wish. *Note: Contact our customer support team about adding Transaction Fees to your merchant account.*
Transaction Amount (Required)	The amount of the transaction.
Purchase ID	The purchase ID, sometimes referred to as the invoice ID, is input by you at the time of transaction processing. The value may appear on the cardholder statement and can be used for reconciliation purposes. This label is configurable in the Virtual Terminal Settings.
Customer	You can load a pre-existing customer stored in the Customer Vault by typing either the Customer ID or the Customer's Name. If you do not have Customer Vault enabled, you will not have this option.
Payment Type	Payment Type will only be available if you accept Credit Cards and ACH payments.
Payment Details (Required)	Credit Card: Card Number, Expiration Date, and CVV Code. ACH: Select Account Holder Type, Account Type, Routing Number, and Account Number.
Name	The first name and last name of the customer.
Business Name	Business name of the customer.
Phone	Phone number of the customer.
Email	Email address of the customer.

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Send Receipt	You can click ***Yes*** to send a receipt to the customer at the time of the transaction. Click ***No*** if you do not wish to send a receipt of the transaction. You can also send a receipt after the transaction has been completed.
Billing Address (Zip Code Required)	Billing address of the customer. Only the ZIP Code is a required field. You can change the Billing country by clicking on the 'X' mark on the current country (for example, the United States). You can also choose the new billing address country by searching for it from the drop-down menu.
Shipping Address	Shipping address of the customer. Here, you can choose from four options: **None**: No shipping address. **Copy From Billing**: The shipping address is the same as the Billing address. **Customer Address**: Select from saved shipping addresses. **New Address**: Add a shipping address for the customer.

Field	Description
Additional Payment Details	Customer Code (Optional): Customer code issued to the cardholder by their company for purchase tracking. Including this information is required for optimal interchange rate qualification. If the cardholder does not have a customer code, you may enter an internal tracking identifier (Invoice number/PO number, etc.). Tax amount (Optional): If a tax amount is included in your transaction, you can enter it here. The tax amount may be shown as a separate line item on your customer's receipt or statement. Manage Line Items (Optional): If a transactional line item is required, add the *Description*, *Unit Cost*, *Unit of Measure*, *Quantity*, *Product Code*, and *Commodity Code* for each line item. *Note: Tax and line item amounts are for reporting purposes only and will not be reflected in the transaction amount.* Merchant Reference: A value created by you and used for reconciliation purposes.
Save This Customer	You can save a new customer to the Customer Vault directly by clicking on the toggle next to *Save This Customer?*. Assign a *Customer ID* to the new customer you wish to add to the Customer Vault. If you do not have Customer Vault enabled, you will not be able to save a customer.