# Virtual Terminal Transaction Fields

Last Modified on 05/12/2023 2:38 pm PDT

| Field | Description |
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| 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 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 Name of the Customer. 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 both Credit Cards and ACH payments. |
| Payment Details (Required) | Credit Card: Card Number, Expiration Date, and CVV Code.<br>ACH: Select Account Holder Type, Select 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. |
| Send Receipt | You can send a receipt to the customer at the time of the transaction by clicking on ***Yes***. Click ***No*** if you do not wish to send the customer a receipt of the transaction. You can send a receipt after the transaction has been completed. |
| Billing Address (Zip Code Required) | Billing address of the customer. Only ZIP Code is a required field.<br><br>You can change the Billing country by clicking on the 'X' mark on the current country (example, the United States). You can choose the new Billing address country by searching for the country from the drop-down. |

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| Shipping Address | Shipping address of the customer. Here you can choose from four options:<br><br>**None**: No shipping address.<br>**Copy From Billing**: Shipping address is same as the Billing address.<br>**Customer Address**: Select from saved shipping addresses.<br>**New Address**: Add a shipping address for the customer. |
| 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.).<br><br>Tax amount (Optional): If a tax amount is included in your transaction, you can enter the tax amount here. The tax amount may be shown as a separate line item on your customer's receipt or statement.<br><br>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.<br><br>*Note: Tax amount and line item amounts are for reporting purposes only and will not be reflected in the transaction amount.*<br><br>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?*.<br><br>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. |