

With the Clearent Virtual Terminal, merchants can accept credit card payments using the web browser on a computer, tablet, or mobile device. In this guide, you will find step-by-step instructions for using the Virtual Terminal. If you have questions or need more information, please contact Technical Support at technicalsupport@clearent.com or 866.435.0666.

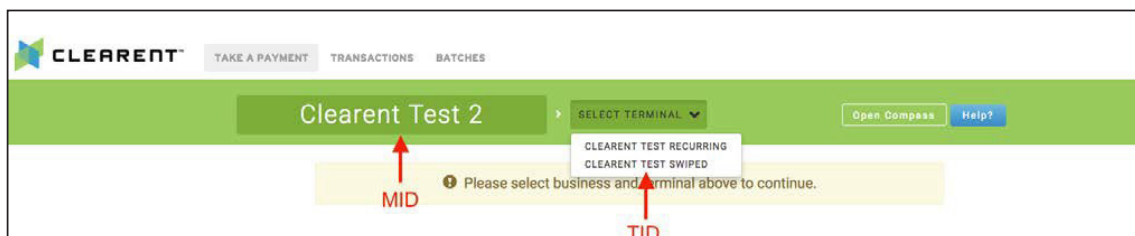
In this guide you will learn how to:

- Sign In
- Modify Default Settings
- Take a Payment
- Select Receipt Options
- Void a Transaction
- Perform a Tip Adjust
- Refund a Transaction
- Identify Pending Authorizations
- Process Recurring Payments
- Process Ad-Hoc Card On File Payments



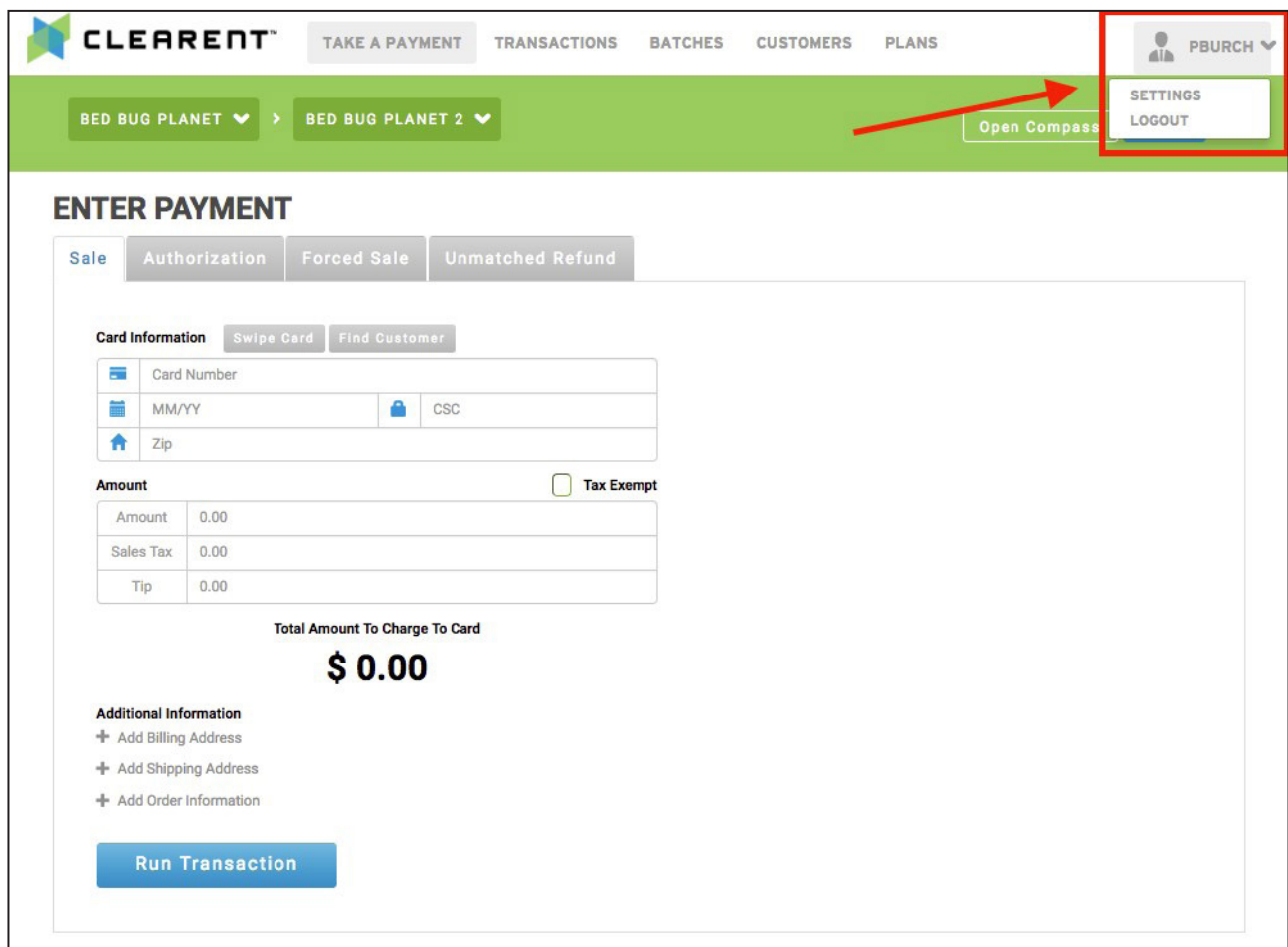
How to Sign In

- Access the Clearent Virtual Terminal at: <https://vt.clearent.net>.
- Click here if you need to reset your password: <https://compass.clearent.net/clearent/portal.aspx>.
- Your Clearent user name also works for Compass and the Virtual Terminal. Changing your password in one place changes it in all going forward.
- Once you have signed in to the Virtual Terminal:
 - Select your Business (MID) from the drop-down menu.
 - Select your Terminal ID (TID) from the drop-down menu.
 - To ensure your transactions qualify at the best rates our team will setup a separate Swiped and Recurring terminal for you to use in the Virtual Terminal.
 - If you are using a card reader or entering payments manually please be sure to select the "Your Company Name - Swiped" option under the terminal choices to qualify at the best rates.
 - If you are setting up recurring payments please be sure to select the "Your Company Name - Recurring" option under the terminal choices to qualify at the best rates.



Default Settings

1. Select the drop-down arrow next to your User Name to reveal the "Settings" section.
2. Select "Settings."



CLEARANT™ TAKE A PAYMENT TRANSACTIONS BATCHES CUSTOMERS PLANS

BED BUG PLANET > BED BUG PLANET 2

Open Compass

PBURCH ▾

SETTINGS
LOGOUT

ENTER PAYMENT

Sale Authorization Forced Sale Unmatched Refund

Card Information Swipe Card Find Customer

Card Number			
MM/YY		CSC	
Zip			

Amount ☐ Tax Exempt

Amount	0.00
Sales Tax	0.00
Tip	0.00

Total Amount To Charge To Card

\$ 0.00

Additional Information

- + Add Billing Address
- + Add Shipping Address
- + Add Order Information

Run Transaction

General Settings

Within the “General” tab the following options are available:

- a. Terminal Name – This is the terminal name used on receipts.
- b. Time Zone – This is the time zone displayed within the Virtual Terminal.
- c. Enable Auto Close Batch – When auto close is turned on, the Gateway will automatically submit the open batch of transactions for settlement at a designated time each day.
- d. Auto Close Batch Time – Select the time you want to auto close batches.
- e. Enable Batch Close Report – Select to enable automatic sending of daily batch reports via email.
- f. Batch Report Recipients – Enter and add the email address for each person who should receive the daily batch report.

The screenshot displays the CLEARANT General Settings interface. At the top, there's a navigation bar with 'TAKE A PAYMENT', 'TRANSACTIONS', and 'BATCHES'. Below this, a green header bar shows 'BED BUG PLANET' and 'BED BUG PLANET 1' with dropdown arrows, and buttons for 'Open Compass' and 'Help?'. The main section is titled 'SETTINGS' and has three tabs: 'General' (selected), 'Address Verification (AVS)', and 'Card Security Code (CSC)'. Under the 'General' tab, the following settings are visible:

- Merchant DBA Name:** Bed Bug Planet
- Terminal Name:** Bed Bug Planet 1
- Merchant ID:** 000000502914
- Terminal ID:** 22122220
- Time Zone:** Default (UTC) (dropdown menu)
- Enable Recurring Payment Services:** ☐
- Enable Auto Close Batch (UTC):** ☒ (with a time picker set to 10:00 PM)
- Enable Batch Close Report (UTC):** ☒ (with a time set to 11:00 PM and a note: "When auto-batch is enabled, batch close report is generated approximately 1 hour after batch close.")
- Batch Report Recipients:** A list containing 'youremail@yourcompany.com' with an 'Add' button and a 'Remove' button.

A 'Save All' button is located at the bottom of the settings panel.

Address Verification (AVS)

Address Verification (AVS) is a security feature designed to reduce fraud. AVS helps ensure that the customer using the credit card is the actual owner of the card by matching the billing address entered with the address on file at the cardholder's issuing bank. AVS information is also required to reduce processing costs for key entered, card not present, and e-commerce transactions.

Within the "Address Verification (AVS)" tab the following options are available:

- a. Enable AVS – The default setting for AVS is **Disabled**.
 - i. When AVS is disabled, Clearent will not stop transactions that receive an approval from the cardholder's issuing bank. Clearent will send the address information if it is provided, which may be used by the bank in making its approval decision.
 - ii. When AVS is enabled, Clearent will void the transaction unless certain AVS responses are received, even when the transaction receives an approval from the cardholder's issuing bank.
- b. If AVS is **Enabled** – The following AVS options will be selected by Default. For advanced users, these are the standard AVS response codes used by the payment networks and issuing banks.

The screenshot shows the Clearent web interface. At the top is a navigation bar with links: TAKE A PAYMENT, TRANSACTIONS, BATCHES, CUSTOMERS, PLANS. On the right is a user profile icon labeled 'PBURCH'. Below the navigation bar is a green header with two dropdown menus: 'BED BUG PLANET' and 'BED BUG PLANET 2'. To the right of these are buttons for 'Open Compass' and 'Help?'. The main content area is titled 'SETTINGS' and has four tabs: 'General', 'Address Verification (AVS)', 'Card Security Code (CSC)', and 'Hosted Payment Page (HPP)'. The 'Address Verification (AVS)' tab is active. It contains a blue informational box stating: 'When AVS is enabled, Clearent will void the transaction unless certain AVS responses are received, even when the transaction receives an approval from the cardholder's issuing bank.' Below this is a section titled 'Enable AVS' with a checked checkbox and a help icon. Underneath is a table with the heading 'ALLOW APPROVAL OF TRANSACTIONS WHEN...'. The table has two columns: the first column lists conditions with checkboxes, and the second column lists the corresponding AVS codes. The conditions and codes are: 'Match of address and 9-digit zip code' (X), 'Match of address and 5-digit zip code' (Y), 'Match of 9-digit zip code; address does not match' (W), 'Match of 5-digit zip code; address does not match' (Z), 'Address: Address Matches ZIP Does Not Match' (A), 'No: Address and ZIP Do Not Match' (N), 'Address information not verified' (G), 'Service Not Supported: Issuer does not support address verification' (S), 'Address information is unavailable' (U), 'Error: Transaction ineligible for address verification' (E), and 'Retry: System Unavailable or Timeout' (R).

ALLOW APPROVAL OF TRANSACTIONS WHEN...	AVS CODE
<input checked="" type="checkbox"/> Match of address and 9-digit zip code	X
<input checked="" type="checkbox"/> Match of address and 5-digit zip code	Y
<input checked="" type="checkbox"/> Match of 9-digit zip code; address does not match	W
<input checked="" type="checkbox"/> Match of 5-digit zip code; address does not match	Z
<input type="checkbox"/> Address: Address Matches ZIP Does Not Match	A
<input type="checkbox"/> No: Address and ZIP Do Not Match	N
<input type="checkbox"/> Address information not verified	G
<input type="checkbox"/> Service Not Supported: Issuer does not support address verification	S
<input checked="" type="checkbox"/> Address information is unavailable	U
<input type="checkbox"/> Error: Transaction ineligible for address verification	E
<input type="checkbox"/> Retry: System Unavailable or Timeout	R

Card Security Code (CSC)

Card Security Code (CSC) is a security feature to reduce fraud. The CSC is a 3 or 4-digit number on the card, which is used to verify that the customer has the card in his or her possession. The CSC is printed on the back of the card in the signature panel for Visa, MasterCard, and Discover. The CSC is printed on the front of American Express cards in the upper right. The CSC has different names used by different networks. For example, Visa calls it the Card Verification Value (CVV2) and MasterCard calls it the Card Validation Code (CVC2).

Within the "Card Security Code (CSC)" tab the following options are available:

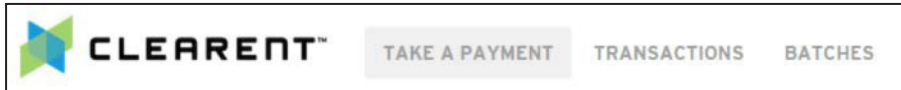
- a. Enable CSC – The default setting for CSC is **Disabled**.
 - i. When CSC is **enabled**, Clearent will void the transaction for any CSC responses that are not allowed, even if the transaction receives an approval from the cardholder's issuing bank.
 - ii. When CSC is **disabled**, Clearent will not stop transactions that receive an approval from the cardholder's issuing bank. Clearent will send the CSC if it is provided, which may be used by the bank in making its approval decision.
- b. If CSC is **enabled** – The following CSC options will be selected by default. For advanced users, these are the standard CSC response codes used by the payment networks and issuing banks.

The screenshot shows the Clearent web application interface. At the top, there's a navigation bar with the Clearent logo and menu items: TAKE A PAYMENT, TRANSACTIONS, BATCHES, CUSTOMERS, and PLANS. Below this is a green header bar with two dropdown menus set to 'BED BUG PLANET' and two buttons: 'Open Compass' and 'Help?'. The main content area is titled 'SETTINGS' and contains four tabs: 'General', 'Address Verification (AVS)', 'Card Security Code (CSC)', and 'Hosted Payment Page (HPP)'. The 'Card Security Code (CSC)' tab is active. It features a blue informational box stating: 'When CSC is enabled, Clearent will void the transaction for any CSC responses that are not allowed, even if the transaction receives an approval from the cardholder's issuing bank.' Below this, there's a section for 'Enable CSC' with a checked checkbox and a help icon. Underneath is a table for 'ALLOW APPROVAL OF TRANSACTIONS WHEN...' with two columns: the condition and the 'CSC CODE'. The table lists six conditions, all of which have their checkboxes checked. At the bottom of the settings area is a 'Save All' button.

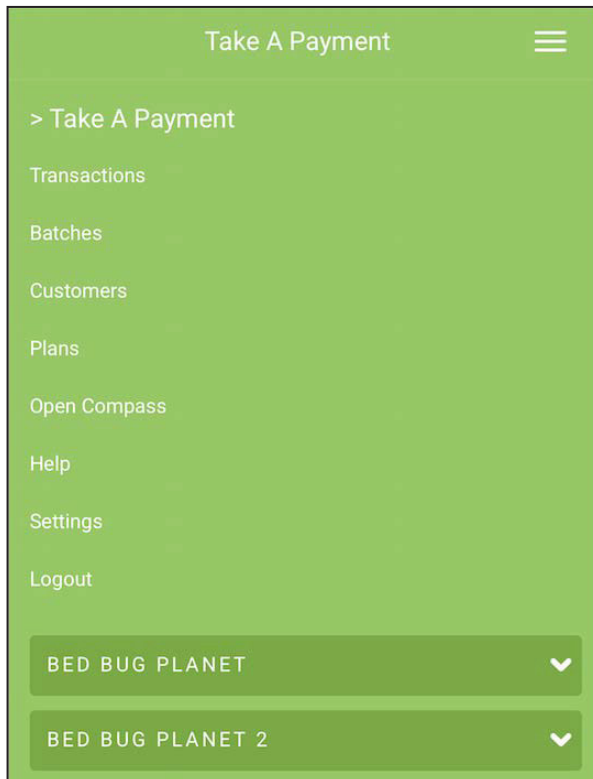
ALLOW APPROVAL OF TRANSACTIONS WHEN...	CSC CODE
<input checked="" type="checkbox"/> The CSC matches the issuing bank's records	M
<input type="checkbox"/> The CSC does not match the issuing bank's records	N
<input checked="" type="checkbox"/> The CSC was not processed	P
<input type="checkbox"/> The card should have a CSC, but merchant indicated it was not present	S
<input checked="" type="checkbox"/> Card issuing bank does not participate	U
<input checked="" type="checkbox"/> Unknown / No response	X

Take a Payment

1. After you sign in, select a MID and TID, if there is more than one option.
2. By default “Take a Payment” is selected when you sign in.
 - a. Here’s what the top menu looks like on a PC.



- b. Here’s what the top menu looks like on a mobile device.



3. Select the payment type (sale, authorization, forced sale, unmatched refund) that you want to perform.
4. Enter the amount.

5. Enter the card information, or if you have an encrypted card reader attached to your device, click the “Swipe” button.
 - a. At minimum, you must complete the following fields:
 - i. Amount – Note that you will need to manually enter the decimal point.
 - ii. Card Number
 - iii. Expiration – MM/YY
 - iv. CSC – security code on the back of the card
 - v. Zip code – recommended but not required
 - b. You can also add additional information such as a billing address, shipping address, or additional order information.

CLEARENT™ TAKE A PAYMENT TRANSACTIONS BATCHES CUSTOMERS PLANS

BED BUG PLANET > BED BUG PLANET 2

ENTER PAYMENT

Sale Authorization Forced Sale Unmatched Refund

Card Information Swipe Card Find Customer

Card Number		
MM/YY	CSC	
Zip		

Amount ☐ Tax Exempt

Amount	0.00
Sales Tax	0.00
Tip	0.00

Total Amount To Charge To Card

\$ 0.00

Additional Information

- + Add Billing Address
- + Add Shipping Address
- + Add Order Information

Run Transaction

Select Receipt Options

After a successful transaction you can print or email the receipt from the Transaction Detail page.

- If you need a receipt for a transaction at a later time, you can search for the transaction and navigate to the Transaction Detail page to email or print the receipt. To begin your search, select "Transaction" in the main navigation at the top of the screen, or from the hamburger menu on a mobile device.
- Use the filters to help find the appropriate transaction.

DATE
Last 180 Days

TRANSACTION ID

AMOUNT
e.g. 2.00

TRANSACTION TYPE
All Sale Auth Refund Capture Pending Auth

LAST 4 DIGITS OF CARD
e.g. 1111

AUTH CODE

More Filters

Choose Columns

Search


- When you see the transaction you want, simply click on the corresponding row.

TRANSACTION ID	AMOUNT	LAST 4 DIGITS OF CARD	TRANSACTION TYPE	AUTH CODE	DATE	STATUS
114898392	\$1.00	7963	Sale		01/19/2022 at 4:54 PM	Transaction Declined by Card Issuer
114711955	\$1.03 Non-Cash Adjustment: \$0.03	2009	Sale		10/28/2021 at 2:47 PM	Transaction approved VOIDED
114711954	\$1.05 Non-Cash Adjustment: \$0.03	2009	Sale		10/28/2021 at 2:46 PM	Declined by Issuer - Referred - Please call Card Issuer
114711951	\$1.27 Non-Cash Adjustment: \$0.04	2009	Sale	AXS750	10/28/2021 at 2:44 PM	Transaction approved VOIDED
	\$1.03				10/28/2021 at 2:42	

- You should now see the Transaction Detail page for your chosen transaction. In the right corner of the screen you will see the option to print or email the receipt.

Capture Void

Print/Email Receipt Go Back

TRANSACTION: 114686001
Total: 2060.00
Date: 10/13/2021 08:31 PM
Type: AUTH - APPROVED
Card: **** * 0057 
Entry Method: 0
Auth Code: VTLMC1
AVS Result: Match of address and 5-digit zip code (Y)
CSC Result: The CSC matches the issuing bank's records (M)
BILLING ADDRESS
, 85284
ORDER INFORMATION
Order ID: 114686001


- e. Click on the button and you will have the option to print a customer receipt that has a signature line for the customer to sign or a business receipt for the business' records. You may also choose to print both types of receipts. If you would like to email the receipt, enter the email address for the recipient and click "Email." If you are enrolled in Clearent's Empower Program, the receipt will also include the Surcharge, Non-Cash Adjustment, Convenience Fee or Service Fee on emailed and printed receipts.

Regular Receipt

RECEIPT PRINTING

BUSINESS COPY

BED BUG PLANET
4023 MacArthur Ave
Richmond, MO 23227
(804) 303-2751

Terminal: Bed Bug Planet 2
Transaction ID: 114116209
Transaction Date: 02/09/2021 09:51 AM
Transaction Type: SALE - APPROVED
Card Number: **** * 1111 
AUTH: TAS650

Order ID: tuition
Purchase Order: t
Customer ID: Invoice 444

Amount: \$ 1 0 0 . 0 0
Total: \$ 1 0 0 . 0 0

I agree to pay the above total amount according to the card issuer agreement.


X_____

Surcharging Receipt

RECEIPT PRINTING

BUSINESS COPY

BED BUG PLANET
4023 MacArthur Ave
Richmond, MO 23227
(804) 303-2751

Terminal: Bed Bug Planet 2
Transaction ID: 114116224
Transaction Date: 02/09/2021 09:57 AM
Transaction Type: SALE - APPROVED
Card Number: **** * 6909 
AUTH: DSC356

Order ID: tuition
Purchase Order: t
Customer ID: invoice 333

Amount: \$ 1 0 0 . 0 0
Surcharge: \$ 2 . 6 5
Total: \$ 1 0 2 . 6 5

I agree to pay the above total amount according to the card issuer agreement.

X_____

Void a Transaction

1. Find the transaction using the Transaction search functionality.
2. Use the filters to find the transaction you want to void.

[illegible]

3. Locate the correct transaction from the list. On the right hand side of the list there is a drop down menu with follow-on transaction options. "Void" will be an option if the transaction hasn't been settled in a batch.

DATE

Last 180 Days

TRANSACTION ID

AMOUNT

e.g. 2.00

TRANSACTION TYPE

All

Sale

Auth

Refund

Capture

Pending Auth

LAST 4 DIGITS OF CARD

e.g. 1111

AUTH CODE

More Filters

Choose Columns

Search

Perform a Tip Adjust

Transactions run on the Virtual Terminal or on terminals connected to Quest (Clearent's payment gateway), can be tip adjusted on the Virtual Terminal.

1. Find the transaction using the Transaction search functionality. If you ran the original transaction from a terminal the RefID on the receipt will be the transaction ID in the Virtual Terminal Search.
2. Once you find the transaction, click on the drop-down menu and select "Tip Adjust."

TRANSACTION ID	AMOUNT	LAST 4 DIGITS OF CARD	TRANSACTION TYPE	AUTH CODE	DATE	STATUS	
100160055	\$70.00 Tip: \$50.00	1168	Sale	178230	Today at 4:30 PM	Transaction approved	<div>Refund</div> <div>Void</div> <div>Adjust Tip</div>
99862081	\$650.00	5023	Sale	064122	Last Wednesday at 4:41 PM	Transaction approved	
99658408	\$0.00	9170	Card Inquiry	01790S	Last Tuesday at 11:41 AM	Transaction approved	
99658276	\$0.00	1111	Card Inquiry		Last Tuesday at 11:41 AM	Declined by Issuer - Frequency limit exceeded	

3. Click on "Adjust Tip" and a new window will appear. Fill in the tip amount field with the new tip amount. If the original amount was \$1.00 and you want a total tip of \$5.00, you would put \$5.00 in the tip amount field. Then click "Adjust Tip" to complete the transaction.

ADJUST TIP: 100160055

Current Tip: 50.00

New Tip Amount:

Adjust TipGo Back

TRANSACTION: 100160055

Amount: 20.00
Tip: 50.00
Total: 70.00
Date: 08/14/2020 04:30 PM
Type: SALE - APPROVED
Card: **** * 1168
Batch: 000340
Entry Method: 0
Auth Code: 178230

BILLING ADDRESS
Jill Willard
(614) 895-8597

Refund a Transaction

There are two types of refunds, matched refunds and unmatched refunds. The refund described below is for a matched refund, which means that the refund is for a specific transaction and the card does not need to be represented in order to complete the refund. The amount of the refund can be for a partial amount or the entire transaction. It cannot be for more than the original transaction.

An unmatched refund is a credit on an account and is not related to any previous transaction. This type of transaction is also highly associated with employee fraud, so by default the ability to perform unmatched refunds is turned off for most accounts. If you need it turned on, please contact Customer Support at customersupport@clearent.com or 866.435.0666.

1. Find the transaction you wish to refund by using the Transaction search feature, as described above.
2. Once you find the transaction, click on the drop down menu and select "Refund."

TRANSACTION ID	AMOUNT	LAST 4 DIGITS OF CARD	TRANSACTION TYPE	AUTH CODE	DATE	STATUS	
333256	\$5.00	1111	Sale	TAS618	09/12/2021 at 2:11 PM	Transaction approved	Void ▾
332055	\$3.33	1111	Void	TAS094	09/08/2021 at 8:17 PM	Advice accepted	Refund
332051	\$3.33	1111	Sale	TAS094	09/08/2021 at 8:16 PM	Transaction approved	VOIDED
332047	\$3.33	1111	Sale	TAS086	09/08/2021 at 8:16 PM	Transaction approved	Void ▾
332046	\$3.33	1111	Sale		09/08/2021 at 8:16 PM	Could not decrypt card data	

3. Click on "Refund" and a new window will appear. The amount will be for the full amount by default. If you want to change the amount, simply click in the "Amount" field and change the amount. You can add notes to the transaction as well. Then click "Process Refund" to complete the transaction.

BED BUG PLANET ▾ > BED BUG PLANET 1 ▾

Open Compass

REFUND: 333256

Amount:

Comments:

Process Refund

Go Back

TRANSACTION: 333256

Amount: 5.00
Type: SALE
Card: **** * 1111

Result: Transaction approved
Batch: 000125
Entry Method: 0
Auth Code: TAS618

ORDER INFORMATION
Order ID: 333256

Identify Pending Authorizations

Businesses that run authorizations and capture the amount at a later time can occasionally miss an authorization. Clearent has created a filter in the Transaction search to make sure that doesn't happen to your business.

1. Click on the "Transactions" link in the top menu.
2. Click on the "Pending Auth" button in the transaction search area and then click "Search."

The screenshot shows the Clearent Transaction Search interface. At the top, there are dropdown menus for 'BED BUG PLANET' and 'BED BUG PLANET 1', and an 'Open Compass' button. Below this, there are several search filters: 'DATE' (Last 180 Days), 'TRANSACTION ID', 'AMOUNT' (e.g. 2.00), 'TRANSACTION TYPE' (All, Sale, Auth, Refund, Capture, Pending Auth), 'LAST 4 DIGITS OF CARD' (e.g. 1111), and 'AUTH CODE'. A red arrow points to the 'Pending Auth' button in the TRANSACTION TYPE section. At the bottom, there are buttons for 'More Filters', 'Choose Columns', and 'Search'.

3. The results will include transactions that have not been captured. You can capture an authorization for less than the full amount or the full amount. To capture over the full amount you can add a tip. Simply click the "Capture" button to the right, enter a tip (if necessary), and click "Process Capture."

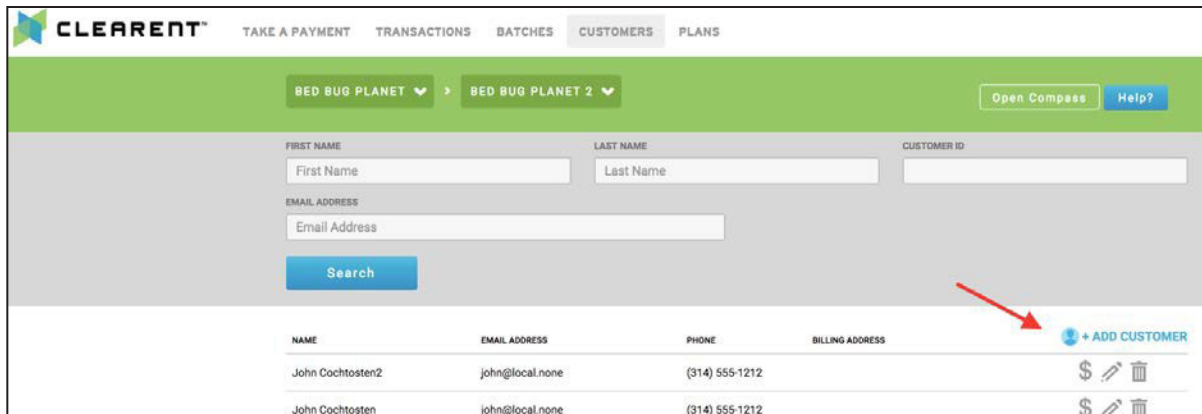
TRANSACTION ID	AMOUNT	LAST 4 DIGITS OF CARD	TRANSACTION TYPE	AUTH CODE	DATE	STATUS	
114686001	\$2060.00	0057	Auth	VTLMC1	10/13/2021 at 8:31 PM	Transaction approved	Capture ▾
2703111	\$1.00	3488	Auth		02/14/2019 at 9:29 PM	Declined by Issuer - Invalid card security code	

The screenshot shows the 'CAPTURE: 114686001' screen in the Clearent interface. On the left, there are input fields for 'Amount' (2060.00), 'Tip Amount', and 'Comments'. Below these are 'Process Capture' and 'Go Back' buttons. On the right, there is a 'TRANSACTION: 114686001' section with details: Total: 2060.00, Date: 10/13/2021 08:31 PM, Type: AUTH - APPROVED, Card: **** * 0057, Entry Method: 0, Auth Code: VTLMC1, AVS Result: Match of address and 5-digit zip code (Y), CSC Result: The CSC matches the issuing bank's records (M). Below this is the 'BILLING ADDRESS' (,85284) and 'ORDER INFORMATION' (Order ID: 114686001).

Recurring Payments

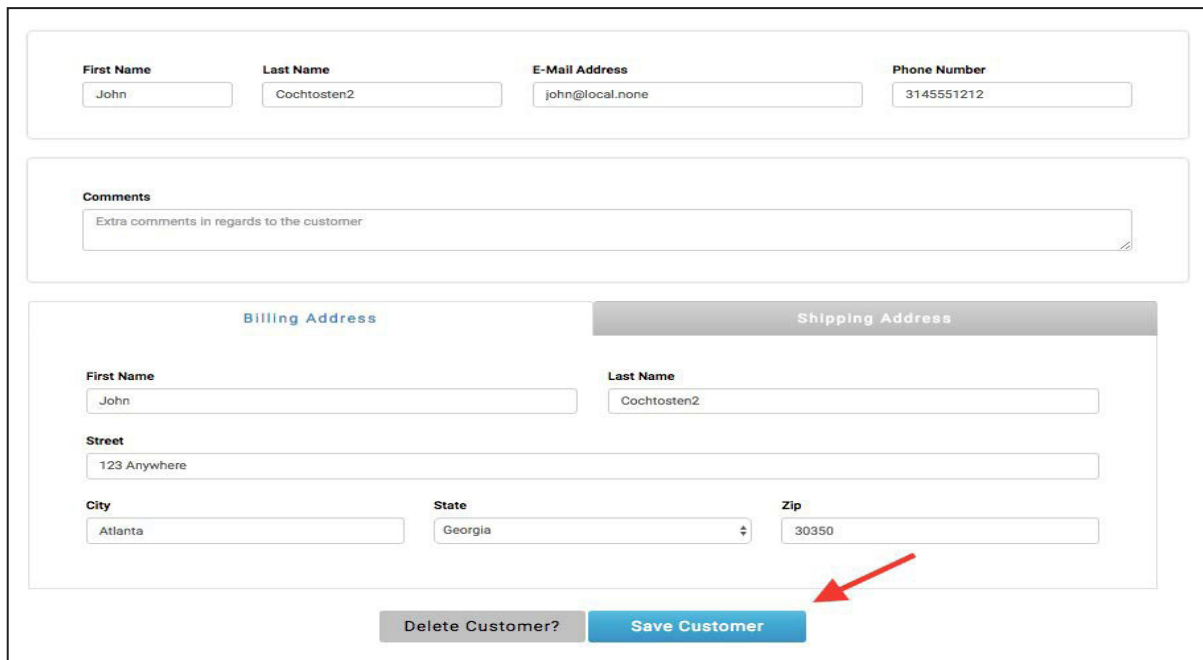
Clearent's Virtual Terminal supports setting up recurring payments for your customers. Please note that this functionality is not enabled by default and requires additional setup. This guide will show you how to create a customer, add card details, and set up a recurring payment plan for the customer.

1. Select "Customers" from the main navigation.
2. Select "Add Customer."



The screenshot shows the Clearent Virtual Terminal interface. The top navigation bar includes 'TAKE A PAYMENT', 'TRANSACTIONS', 'BATCHES', 'CUSTOMERS', and 'PLANS'. The 'CUSTOMERS' tab is selected. Below the navigation bar, there are dropdown menus for 'BED BUG PLANET' and 'BED BUG PLANET 2', along with 'Open Compass' and 'Help?' buttons. The main form area has input fields for 'FIRST NAME' (First Name), 'LAST NAME' (Last Name), 'EMAIL ADDRESS' (Email Address), and 'CUSTOMER ID'. A 'Search' button is located below the email address field. At the bottom, there is a table with columns: NAME, EMAIL ADDRESS, PHONE, BILLING ADDRESS, and a '+ ADD CUSTOMER' button with a red arrow pointing to it. The table contains two entries for 'John Cochtosten2' and 'John Cochtosten'.

3. Enter the customer details and select "Save Customer."



The screenshot shows the 'Add Customer' form. It includes input fields for 'First Name' (John), 'Last Name' (Cochtosten2), 'E-Mail Address' (john@local.none), and 'Phone Number' (3145551212). There is a 'Comments' section with a text area for 'Extra comments in regards to the customer'. Below this, there are two address sections: 'Billing Address' and 'Shipping Address'. The 'Billing Address' section has input fields for 'First Name' (John), 'Last Name' (Cochtosten2), 'Street' (123 Anywhere), 'City' (Atlanta), 'State' (Georgia), and 'Zip' (30350). The 'Shipping Address' section is currently empty. At the bottom, there are two buttons: 'Delete Customer?' and 'Save Customer', with a red arrow pointing to the 'Save Customer' button.

4. Select "Add Card."

JOHN COCHTOSTEN
JOHN@LOCAL.NONE
ID: cust_b9da0b6d-f4d3-42b5-bc98-7cb03dccc30de

CUSTOMER DETAILS

Phone	(314) 555-1212
Billing	
Shipping	
Comments	

CARDS

1111	VISA	recurring	\$		
------	------	-----------	----	--	--

RECENT TRANSACTIONS

No transactions found

[+ ADD CARD](#)

[ALL TRANSACTIONS >](#)

5. Add customer card details and select "Add Card." In the "Description" field we recommend entering a description that indicates the card is "For Recurring Payments" or something similar.

JOHN COCHTOSTEN2
JOHN@LOCAL.NONE
ID: cust_28ab415c-bb07-4cfc-a432-ae5f60be18f6

CUSTOMER DETAILS

Phone	(314) 555-1212
Billing	123 Anywhere Atlanta, GA 30350
Shipping	
Comments	

CARDS

Card Details

VISA	4111 1111 1111 1111
12/19	123
For Recurring Payments	Add Card

[Cancel](#)

6. The next step is to add a plan for the customer. Select “Add Plan.”

JOHN COCHTOSTEN
JOHN@LOCAL.NONE
ID: cust_b9da0b6d-f4d3-42b5-bc98-7cb03dccc30de

CUSTOMER DETAILS

Phone (314) 555-1212

Billing

Shipping

Comments

CARDS + ADD CARD

1111 visa recurring

RECENT TRANSACTIONS ALL TRANSACTIONS >

No transactions found

SUBSCRIBED PLANS + ADD PLAN

No subscribed plans found

7. Enter the plan details, amount to be charged, start and stop dates and frequency of payment.
8. Select “Save Plan.” The Virtual Terminal will automatically process the payment based on the plan settings. You can view recurring transactions within the Virtual Terminal under “Transactions.”

JOHN COCHTOSTEN
JOHN@LOCAL.NONE
ID: cust_b9da0b6d-f4d3-42b5-bc98-7cb03dccc30de

ADD PLAN

Plan Name

Recurring Plan for John

Amount

10

Card

**** 1111 • Visa • recurring

Start date must be Wednesday, September 28th 2016 or later.

Start Date 09-28-2016

End Date 12-28-2018

Frequency

Weekly Monthly Yearly

Day 28 of every 1 month(s)

Forecast Dates

1. 09-28-2021
2. 10-28-2021
3. 11-28-2021
4. 12-28-2021
5. 01-28-2021

Save Plan

1. If you are enrolled in Clearent's Account Updater Service, Clearent will automatically scan and update out-of-date card data from Visa and MasterCard. You can view when a card was last updated by hovering over the card on a customer page.

CUSTOMER \$ ✎ **CARDS** + ADD CARD

Details matt curran
mcurran@clearent.com
(270) 210-7621
ID: cust_a95867f5-4ecc-4b15-8a8a-db17f887b0b8

Billing 222 s central ave clayton, MO 63135

Shipping

Comments Sales Trainer test

CARDS ★ \$ ✎ 🗑

Last updated: Mon Aug 27 2021

Ad-Hoc Card On File Payments

Clearent's Virtual Terminal supports processing ad-hoc payments for your customers who have a card on file stored. This section will show you how to process an ad-hoc payment for the customer.

1. Select "Take A Payment" from the main navigation.

TAKE A PAYMENT **TRANSACTIONS** **BATCHES** **CUSTOMERS** **PLANS**

BED BUG PLANET **BED BUG PLANET 2**

ENTER PAYMENT

Sale **Authorization** **Forced Sale** **Unmatched Refund**

Card Information **Swipe Card** **Find Customer**

Card Number
MM/YY
CSC
Zip

Amount
\$ 0.00

Additional Information
+ Add Billing Address
+ Add Shipping Address
+ Add Order Information

Run Transaction

2. Select "Find Customer" under "Enter Payment."

ENTER PAYMENT

Sale Authorization Forced Sale Unmatched Refund

Card Information Swipe Card **Find Customer**

Card Number
MM/YY CSC
Zip

Amount
\$ 0.00

Additional Information
+ Add Billing Address
+ Add Shipping Address
+ Add Order Information

Run Transaction

3. Search for the customer for which you would like to process a payment.
4. Select the "\$" on the right side and the card on file will populate into the "Card Information" boxes.

FIRST NAME: First Name
LAST NAME: Last Name
CUSTOMER ID:
EMAIL ADDRESS: Email Address
Search

NAME	EMAIL ADDRESS	PHONE	BILLING ADDRESS	
John Cochtosten2	john@local.none	(314) 555-1212	123 Anywhere Atlanta, GA 30350	\$ ✎ 🗑️
John Cochtosten	john@local.none	(314) 555-1212		\$ ✎ 🗑️
Buffy ThePaymentSlayer	testcustomer@clearent.com	(012) 345-6789	123 Bill St. Richmond, MO 63103	\$ ✎ 🗑️
Buffy ThePaymentSlayer	testcustomer@clearent.com	(012) 345-6789	123 Bill St. Richmond, MO 63103	\$ ✎ 🗑️
Buffy ThePaymentSlayer	testcustomer@clearent.com	(012) 345-6789	123 Bill St. Richmond, MO 63103	\$ ✎ 🗑️
Buffy ThePaymentSlayer	testcustomer@clearent.com	(012) 345-6789	123 Bill St. Richmond, MO 63103	\$ ✎ 🗑️

5. Add the amount to charge, optionally enter any additional information, and select “Run Transaction.”

ENTER PAYMENT

SaleAuthorizationForced SaleUnmatched Refund

Card Information

Swipe CardFind Customer

VISA

Visa ending in 1111

12/21

CSC

30350

Amount

\$

0.00

Additional Information

+ Add Billing Address

John

Cochtosten2

123 Anywhere

Atlanta

Georgia

30350

+ Add Shipping Address

+ Add Order Information

Invoice

Purchase Order

Order ID

cust_28ab415c-bb07-4cfc-a432-ae5f60be18f6

Transaction email address

Description

Comment

Run Transaction

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