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A QUICK START GUIDE TO USING BUSINESS MANAGER

Business Manager is your portal to manage the online payments your business takes. This guide shows you how to get started, but if you need more information, see our full guide.

Full guide

1 Take a payment

2 Make a refund

3 View your transaction history

4 Run a report

5 Glossary and other useful links

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Virtual Terminal Transactions

The Virtual Terminal allows you to accept payments from customers by phone.

Pay by Link Transactions

FuturePay Direct (Recurring) Transactions

1. Click **Create** from the options on the left hand menu and then select **Virtual Terminal** from the menu bar at the top.

2. Fill in the relevant details for the payment (mandatory fields marked with a *). This needs to be completed while your customer is on the phone.

3. Click **Submit Transaction** to take the payment.

Possible outcomes

Successfully Created - the new payment is processed with the Transaction ID shown.
Failed - a payment was not processed, and a message is displayed to help understand the reason.
[Click here](link) for more information about why a transaction fails.

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Virtual Terminal Transactions

The Virtual Terminal allows you to accept payments from customers by phone.

Pay by Link Transactions

Pay by Link lets you create a payment link that you can send to a customer by email. When the customer clicks this link, they are sent to your payment page and the information you entered is automatically populated.

FuturePay Direct (Recurring) Transactions

1. Click **Create** from the options on the left hand menu and then select **Pay by Link** from the menu bar at the top.

2. Fill in the relevant details for the payment. (mandatory fields marked with a *)

3. Click **Create Link** to send the payment link to your customer's email.

Possible outcomes

You'll see the message: **Successfully Created** and an email containing the payment link is automatically sent to your customer's email address, and to yours.

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Virtual Terminal Transactions

The Virtual Terminal allows you to accept payments from customers by phone.

Pay by Link Transactions

FuturePay Direct (Recurring) Transactions

FuturePay Direct lets you set up regular online payment agreements with your customers, such as a monthly subscription to a magazine.
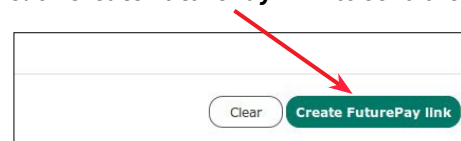
1. Click **Create** from the options on the left hand menu and then select **FuturePay Direct** from the menu bar at the top.
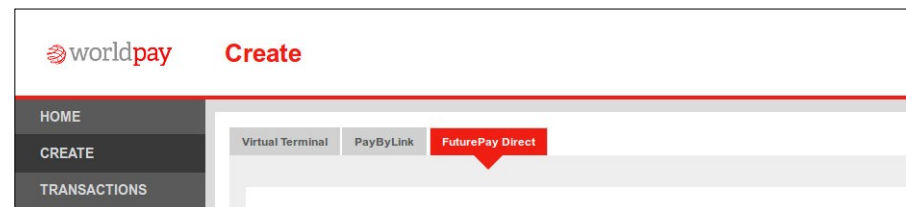
2. Fill in the relevant details for the payment. (mandatory fields marked with a *)

3. Click **Create FuturePay Link** to send the payment link to your customer's email.

Possible outcomes

You'll see the message: **FuturePay link created**. and an email containing the link is automatically sent to your customer's email address and to yours, confirming the payment.

Follow these 3 easy steps to make a refund

Step **1**

Step **2**

Step **3**

Search for the transaction you want to refund

- Click on the **Transactions** tab on the left hand side

- Select **Payments** from the top menu options

- Enter your search criteria – either date, transaction ID or cart ID

- Click the **Search** button in the bottom right hand corner

- You can use **Advanced Search** to search for multiple criteria

Follow these 3 easy steps to make a refund

Step 1

Step 2

Step 3

Select the transaction you want to refund from the list

Click the Refund Transaction button to show the REFUND TRANSACTION window

Follow these 3 easy steps to make a refund

Step **1**

Step **2**

Step **3**

Enter the amount you want to refund - this can be the full amount or part of the transaction value

REFUND TRANSACTION ⊗

Amount available to Refund

1.02 | GBP

Amount to Refund now

1.02 | GBP

Please confirm that you wish to REFUND this transaction. This action can't be undone.

Exit   **Refund Transaction**

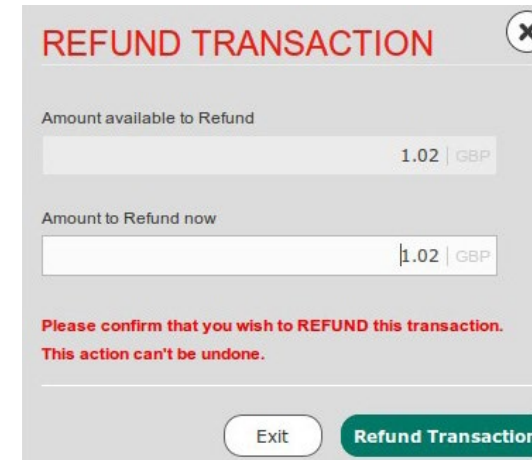- Click the **Refund Transaction** button to process the refund

- This transaction will now have the status of **Refunded** in the transaction list and the refund will begin to process

- You can view the refunded amount in the **Transaction History**

Find a list of your transactions

Find out when money is in your account

You can find a list of your transactions by clicking 'Transactions' from the left hand menu.

From here you can see the transactions that your business has taken online. Use the search bar to do the following:

- **Search for transactions within a specific date range**
  With this Advanced Search feature you can see a list of all the transactions you took in a time period.

- **See transaction details**
  On the far right column you can find out more information about specific transactions. Including whether they have been refunded or disputed.

Find a list of your transactions

Find out when money is in your account

Find out when money will settle into your account by selecting the 'Finance' tab

The Finance tab shows you a breakdown of all the payments that will be going into your account.

- **See money going in and refunds going out**
  If you have any chargebacks these will also be displayed here.

- **Advanced Search**
  This option lets you see settlements from a specific date range so can find the transactions you're most interested in.

With Business Manager you can export your transaction data into different reports and download them into Excel® or .csv files to help with your paperwork.

To run a report on your transaction data you'll need to select the data that you're interested in.

The Transactions tab lets you see information about all the transactions that your business has taken. By using the search bar you can see transactions from a specific date range.

- Once you've chosen the data that you're interested in simply click the **Generate Report** button in the bottom right hand corner.

- You'll be given a choice of what information you'd like to see in the report which is easily customisable. Alternatively you can always use one of the standard report formats that we've built in for you.

- Once you've chosen the required data fields select the format you'd like to see your report. You can choose Excel® or .CSV.

- You can then either download the report or have it sent to you by email.

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Glossary and troubleshooting

'Failed' Message	What does it mean?
Payment refused by card issuer	The customer's card issuer has declined this payment
Please check the number of card digits and try again	The wrong number of card digits has been entered in the Card Number box. • For Visa cards, this should be 13 or 16 digits. • For MasterCard, this should be 16 digits. • For American Express, this should be 15 digits
Refused - possible fraud	Only applies to customers with Worldpay's Risk Management Module (RMM). This payment has been blocked. For more information please contact us on 0330 333 1233 (option 6).
Unable to process payment please see Help	There are various reasons why a payment is unable to process. A common reason is that your installation or account is not active. For more information please contact us on 0330 333 1233 (option 6).
You're not set up to accept this payment method	This payment method has not been activated on your account. If you want to add this payment method, please contact customeramendments@fisglobal.com.

Transaction detail	What does it mean?
Alert	This shows you an exclamation [!] symbol next to any transactions that have failed one or more key risk checks. When you see an exclamation [!] symbol, we recommend that you look more closely at this transaction before you fulfil the order. The Payment tab of this transaction shows you more information about the risk checks that may have failed.
Transaction ID	This shows the unique reference number created by us to identify each transaction. The Transaction ID is sometimes sent to you in various communications from us.
Customer	This shows the name entered by the person making the payment for this transaction. This could be the name on the card, but is not always. For example, if a corporate card is used, the name on the card may be different to the name entered.
Last Activity Date	This shows the most recent date and time that the status of the transaction changed. A transaction can change status a number of times. To learn about statuses and what they mean, see Current Status below.
Authorised Amount	This shows the amount of money that has been authorised for the transaction when it was first made. It may not show how much is due to be taken now (for example, if a partial refund was made).
Authorised Currency	This shows the currency used to authorise the transaction.
Current Status	This shows the current status of each transaction. A transaction will change status as various checks or actions are performed on it.

Other useful links

| Website integration guides | Managing fraud (p8) | Chargebacks (p71) | Support with online payments |

Contact us

Dedicated customer support

If you have any further questions on
how to get set up with Worldpay, let us know.

**Visit fisglobal.com
or give us a call on 0330 333 1233 option 6**