Practice Management **Bridge**®

Virtual Terminal User Guide

Use this guide as a temporary, secure solution to manually key in payment transactions.

How to Log In

1. **Click** here to sign in with your new credentials which were emailed to your account owner.
2. Enter your username and password.
3. Click Login.

How to Process a Sale / Transaction

1. Log in to the Merchant Portal.
2. On the Home screen, under Virtual Terminal, select **Card Sale**.
3. Enter the required transaction fields. Fields marked with an * are required.
4. Recommended: enter first name, last name, address, phone number, and ZIP code to enable address verification (AVS).
5. After verifying all details, click **Charge** at the bottom of the page.

A Transaction Receipt page will display the outcome of the transaction.

How to Void a Sale / Transaction

Note: You can only void a sale that has not been settled (typically same-day transactions). Once settled, the Void option will not be available.

Option 1

1. On the Home screen, under Reporting, select **Transactions**.
2. Enter any known transaction details (e.g., name, date range, transaction amount, last 4 digits of the card).
3. Click **Submit** to display matching transactions.
4. Locate the transaction and click the **Transaction ID** (blue hyperlink).
5. On the Transaction Detail page, click **Void**.
6. A Transaction Receipt will appear confirming that the void was successful.

Option 2

1. In the left panel, select **Credit Card**s → **Void**.
2. Enter the Transaction ID.
    - If you don't know it, click **Search**, which will open the Transaction Search page.
3. Proceed using the steps from Option 1 above.

How to Refund a Transaction

Option 1

1. On the Home screen, under Reporting, select **Transactions**.
2. Enter any known transaction details (e.g., name, date range, transaction amount, last 4 digits of the card).
3. Click **Submit** to display matching transactions.
4. Locate the transaction and click the **Transaction ID** (blue hyperlink).
5. On the Transaction Detail page, click **Refund**.
6. A Transaction Receipt will appear confirming that the refund was successful.

Option 2

1. In the left panel, select **Credit Cards** → **Refund**.
2. Enter the Transaction ID.
    - If unknown, click **Search** to locate the transaction.
3. Proceed using the steps from Option 1 above.

How to Run a Transaction Report

Option 1

1. On the Home Screen, under Reporting, select **Transactions**.
2. Enter date range or any other details in the reporting fields based on your reporting needs.
3. Scroll to bottom of page and select **Submit**.

Option 2

1. In the left panel, click **Transaction Reports**.
    a. Transaction Snapshot will provide you with ways to run settlement reports.
    b. Transaction Search will provide you with ways to run transaction detail reports.
2. Enter date range or any other details in the reporting fields based on your reporting needs.
3. Scroll to bottom of page and select **Submit**.

To export report details, go to the bottom of the report page and select **Download Transactions**. The default export format is Microsoft Excel.

How To Create Users

1. Log in as the Admin user.
2. Navigate to **Options** > **Settings** > **User Accounts**.
3. Select **Add a New User**.
4. Enter the required information into the fields (name, email, and username).
5. Assign specific permissions to the user (e.g. virtual terminal, reports).
6. Select **Create User** to send a Welcome Email for password set up.

Please note: Although this temporary Virtual Terminal may look different from Practice Management Bridge, it operates on the same underlying system. All payments will continue to route to your bank account(s) exactly as they do today.