



iPP 320 PIN Pad

QUICK REFERENCE GUIDE

# Online POS Terminal

Thank you for choosing the Online POS Terminal. Chase is pleased to announce an enhanced version of our iTerminal Product that will support card-present EMV chip card transactions, PIN debit and select mobile wallets. This guide can be used to set up the Online POS Terminal, explain the iPP 320 PIN Pad features and familiarize you with the new web application revised transaction flow.

## **TERMINALS**

iPP 320 PIN Pad

## **SOFTWARE SECURITY**

The software on this terminal has been secured. This will protect it from both inadvertent overwriting and malicious tampering. If you need help with changes or updates, please contact a representative at our service desk.

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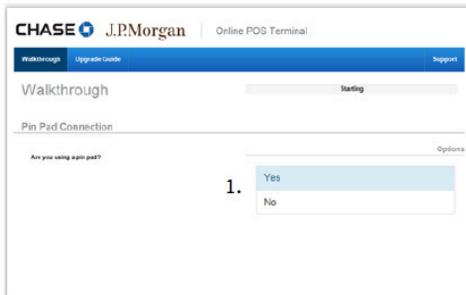
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## START HERE

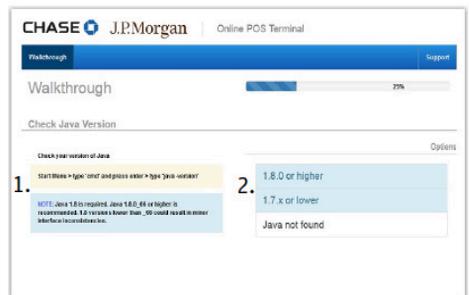
Thank you for choosing the Online POS Terminal. To begin accepting card payments, just follow these easy steps.

1. Remove the iPP 320 PIN pad from the box. Insert the appropriate end of the power/USB cord in the port on the PIN pad, and the other end in an unused USB port on your computer.
2. Online POS Terminal requires Java 8. Please follow the **Update to Java Walkthrough** we created for first-time users.
3. Log in using [chase.com/OnlinePosTerminal](https://chase.com/OnlinePosTerminal) and follow the instructions. (Bookmark this link for future easy access.)
4. Enter credentials – if you are a current iTerminal user, enter your existing **User Name** and **Password** and click **Secure Login**.
5. If you are a new client, please enter the **User Name** and **Temporary Password** you received via email.
6. Follow the **Login** and **Setup** directions on the following pages to begin processing transactions.
7. If you have questions, please call **1-800-503-1132**.

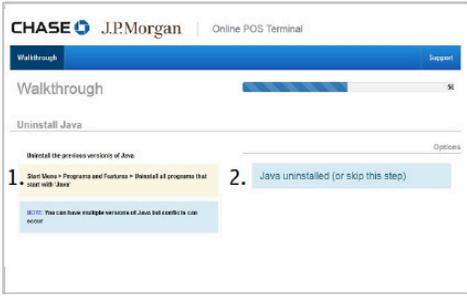
## UPDATE TO JAVA Walkthrough



1. Enter [www.chase.com/OnlinePosTerminal](https://www.chase.com/OnlinePosTerminal) and select **Yes** if you received a PIN pad.



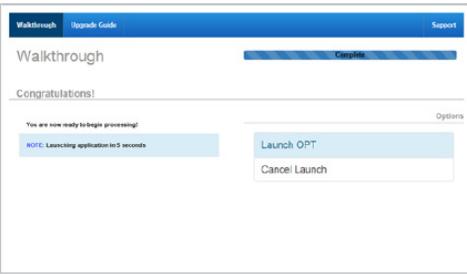
2. Follow instructions in 1. **Yellow Box** to check Java version. 2. Click the version in the **Blue Box**.



3. Follow instructions in 1. **Yellow Box** to uninstall Java version. 2. Click the **Blue Box** when completed.



4. Select 1. **Java Download**, follow prompts, click on **Download/Install**. Successful when complete.



5. Select **Launch OPT** to log in to Online POS Terminal.



6. You will be presented the **Secure Login** screen. Follow the instructions on the next page to log in.

## LOGIN

For future access, create a bookmarked link to the Online POS Terminal using: [chase.com/OnlinePosTerminal](https://chase.com/OnlinePosTerminal) after you complete the Java Walkthrough.

1. You are presented the **Secure Login** screen after you complete the Java Walkthrough.
2. Enter your **User Name** and **Temporary Password** you received via email.
3. Click the **Secure Login** button.
4. You will be instructed to enter a new **Password** and answer **Security Questions** as a first-time user.



**CHASE** **J.P.Morgan**

**Secure Login**

User Name

Password

**Secure Login**

[Edit User Profile](#)

[Forgot your password?](#)

[Need assistance logging in?](#)

After 15 minutes of inactivity, you will be required to login again. All passwords expire every 90 days and accounts that are inactive for an extended period may be deleted.

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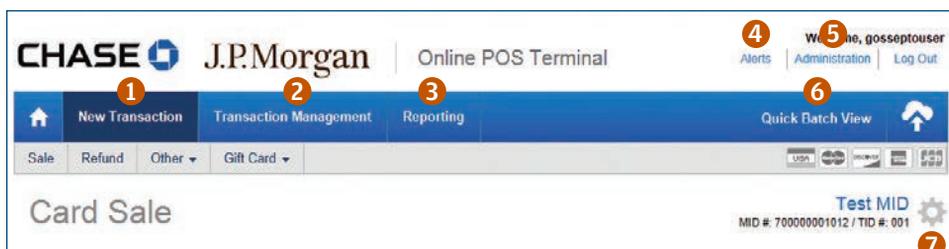
## NAVIGATING THE ONLINE POS TERMINAL

### 1 NEW TRANSACTION

You will process your clients' transactions under this tab: sales, refunds, cardholder verification, pre-auth, prior authorization and gift card.

### 2 TRANSACTION MANAGEMENT

Search transactions, void sales if the batch is open or refund transactions if the batch is closed.



When you log in to Online POS Terminal, you will see this screen. See descriptions of the tabs and icons for easy navigation.

### 3 REPORTING

View or print reporting.

### 4 ALERTS

We send you alerts if your PIN pad needs a new software release. You will also receive an alert if a transaction is rejected.

### 5 ADMINISTRATION

Here you configure your sale, refund, receipt and settlement settings. This is in the **Setup Instructions**.

### 6 QUICK BATCH VIEW

Click the **Cloud Icon** to manually settle your batch. We recommend enabling **Auto Settle** when you set up Online POS Terminal.

### 7 GEAR ICON

If you have more than one **Merchant ID** or **Terminal ID**, you can select the ID you want to be your default ID. You set up these IDs with a Chase Merchant Services representative during onboarding calls.

## SETUP – GEAR ICON

### 7 GEAR ICON

If you have more than one **Merchant ID**, or **Terminal ID**, click on the **Gear Icon** and select **DBA Name** in the drop-down menu to set as your default ID.

CHASE J.P.Morgan | Online POS Terminal

Welcome, gosseptouser

Alerts Administration Log Out

New Transaction Transaction Management Reporting Quick Batch View

Sale Refund Other Gift Card

Card Sale

Test MID

MID #: 70000001012 / TID #: 001

#### NOTE:

If you have more than one **Merchant ID (MID#)** or **Terminal ID (TID#)**, you can select which ID you want as your default ID. Highlight the **Merchant DBA Name** and click **Save Changes**.

Select Merchant

Merchant DBA Name	MID #	TID #
Test MID	70000001012	001
Test MID	70000001012	002
Test MID	70000001012	003
CMC Mobile US	70000005017	001
CMC Mobile US	70000005017	002
CMC Mobile US	70000005017	003
CMC Mobile US	70000005017	004
CMC Mobile US	70000005017	005
CMC Mobile US	70000005017	006

Close Save changes

## SETUP – NEW TRANSACTION

### 1 NEW TRANSACTION

Continue setup by clicking the **New Transaction** tab.

### A ENTRY MODE

Click on **Entry Mode** to choose the **iPP 320 PIN pad**, or **Manual Entry** from the drop-down menu.

- Choose **iPP 320 PIN pad** to process chip, magnetic stripe and contactless card transactions.
- Select **Manual Entry** if you need to manually enter card information.

The screenshot displays the Chase J.P. Morgan Online POS Terminal interface. At the top, the logo for CHASE and J.P. Morgan is visible, along with the text 'Online POS Terminal' and a user greeting 'Welcome, rbosso23'. A navigation bar includes 'New Transaction' (highlighted with a '1'), 'Transaction Management', and 'Reporting'. Below this, there are tabs for 'Sale', 'Refund', 'Other', and 'Gift Card'. The main area is titled 'Card Sale' and shows 'Sale Information' with an 'Amount' input field. On the right, there is a settings gear icon and a dropdown menu for 'Entry Mode' (highlighted with an 'A'), which is currently set to 'Demo pinpad'. The dropdown menu is open, showing two options: 'iPP 320' and 'Manual Entry'.

# SETUP – ADMINISTRATION

## 5 ADMINISTRATION

The **Administration** link will allow users with the proper permissions to perform the following actions for both first-time setup as well as on-the-fly adjustments.

### A GENERAL

Allows you to change the default **Merchant ID (MID#)** and **Terminal ID (TID#)** combination.

**NOTE:**  
The Default Merchant ID you set under the Gear icon earlier is displayed here.

Merchant DBA Name	MID #	TID #
QA CN & VI Both Retail N	700000007815	001
QA CN & VI Both Retail N	700000007815	002
QA CN & VI Both Retail N	700000007815	003
QA CN & VI Both Retail N	700000007815	004

Close Save changes

**NOTE:**  
You can set your Default ID in Administration too.

# SETUP – ADMINISTRATION

## 5 ADMINISTRATION

### B TRANSACTIONS

Select **Hide** or **Show** (display) to determine which fields will appear on your **Sale Screen**.

The screenshot shows the 'Administration' page in the Chase J.P.Morgan Online POS Terminal. The page is divided into several sections with various settings:

- General:** Includes 'Sale Information' with radio buttons for 'Discount' and 'Surcharge' (Hide/Show) and a 'Tax' section with a 'Default Tax Rate' of 7%.
- Additional Prompting:** Includes 'Customer Reference' with radio buttons for 'Hide' and 'Show'.
- Cardholder Verification:** Includes 'Customer Name', 'Card Verification #', and 'Address & Postal Code', each with radio buttons for 'Hide' and 'Show', and a 'Required' checkbox.
- Purchase Card Information:** Includes 'Purchase Card' with radio buttons for 'Hide' and 'Show'.
- Cashback:** Includes 'Debit Cashback' with radio buttons for 'Hide' and 'Show', a 'Maximum Debit Cashback' field set to \$100, and 'Cashback amounts to display on PIN Pad' with three fields set to \$20, \$40, and \$60.

A **NOTE** box with an orange border and arrow points to the **Update** button at the bottom of the page, stating: "NOTE: Click Update when complete."

# SETUP – ADMINISTRATION

## 5 ADMINISTRATION

### C RECEIPTS

Add a Logo, change the Header and Footer information that prints on your receipts.


Online POS Terminal

5 come  
[Help](#) [Alerts](#) [Administration](#) [Log Out](#)

Home
New Transaction
Transaction Management
Reporting
Quick Batch View


## Administration

QA CN & VI Both Retail N  
MID #: 70000007815 / TID #: 001


General

Transactions

**C** Receipts

Settlement

Device Management

### Receipt Image

Browse for an image to upload and include on your receipts. The image must be in PNG format with dimensions no larger than 75px high x 350px wide and must not exceed 80 KB. To ensure your changes are saved, click the 'Update' button at the bottom of the page.

**Image File**

Browse

### Header

Type the text you want to appear on the header of your receipts. Each line can accept up to 40 characters. Required Data - Merchant Name, address and phone number.

<b>Line 1</b>	<input type="text" value="John's Tackle Shop"/>
<b>Line 2</b>	<input type="text" value="123 Main Street"/>
<b>Line 3</b>	<input type="text" value="Tampa, FL"/>
<b>Line 4</b>	<input type="text" value="33607"/>
<b>Line 5</b>	<input type="text" value="(555) 976-5432"/>
<b>Line 6</b>	<input type="text"/>

### Footer

Type the text you want to appear on the footer of your receipts. Each line can accept up to 40 characters.

<b>Line 1</b>	<input type="text" value="Refunds Accepted Within 30 Days"/>
<b>Line 2</b>	<input type="text" value="Thank you for your business!"/>
<b>Line 3</b>	<input type="text"/>
<b>Line 4</b>	<input type="text"/>

**NOTE:**  
Click Update when complete.

Update

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## SETUP – ADMINISTRATION

### 5 ADMINISTRATION

### D SETTLEMENT

Enable or disable **Auto Settlement** and adjust the **Time** and **Time Zone** of when to Auto Settle.

The screenshot shows the 'Administration' page in the Chase J.P.Morgan Online POS Terminal. The page has a blue header with the Chase and J.P.Morgan logos, 'Online POS Terminal', and navigation links for 'Help', 'Alerts', 'Administration', and 'Log Out'. Below the header is a navigation bar with 'New Transaction', 'Transaction Management', 'Reporting', and 'Quick Batch View'. The main content area is titled 'Administration' and includes a sidebar with 'General', 'Transactions', 'Receipts', 'Settlement', and 'Device Management'. The 'Settlement' section is active, showing 'Auto Settle' settings. A warning message states: 'Warning! If Auto Settle is disabled, a manual settlement must be performed via the Quick Batch View section.' The 'Auto Settlement' section has radio buttons for 'Enable' (selected) and 'Disable'. Below this are dropdown menus for 'Time' (set to 2:15 PM) and 'Time Zone' (set to Eastern-0500). A blue 'Update' button is at the bottom right. A callout box with an arrow points to the 'Update' button, containing the text: 'NOTE: Click Update when complete.'

#### NOTE:

We recommend enabling **Auto Settlement**. Your daily batch will be closed and settled automatically.

## SETUP – ADMINISTRATION

### 5 ADMINISTRATION

### E DEVICE MANAGEMENT

To view PIN Pad information, you can choose a **Device Name** for your iPP 320 and perform **EMV Software Downloads** (you receive software updates through the **Alerts** link too).

The screenshot displays the 'Administration' page of the Chase J.P.Morgan Online POS Terminal. The 'Device Management' section is active, showing configuration details for a device named 'iPP320'. The 'Device Name' field is set to 'Front Office PIN Pad' and is highlighted with a red box and an arrow pointing to a note. The note reads: 'NOTE: If you have more than one iPP 320 PIN pad, create a Device Name so you always know what device is connected to your PC.' The form includes fields for Device Name, Device Serial #, Firmware Version #, OS Version #, Device Application Name, Manufacture ID, Swipe Count, EMV Parameters, and Last Update.

Device Management	
<b>Device</b>	iPP320
<b>Device Name</b>	Front Office PIN Pad <input type="text"/>
<b>Device Serial #</b>	2215233PT010054
<b>Firmware Version #</b>	1702
<b>OS Version #</b>	4612
<b>Device Application Name</b>	Retail Base
<b>Manufacture ID</b>	INGENICO
<b>Swipe Count</b>	0127
<b>EMV Parameters</b>	<input type="button" value="Update"/>
<b>Last Update</b>	April 1, 2016

**NOTE:**  
If you have more than one iPP 320 PIN pad, create a **Device Name** so you always know what device is connected to your PC.

# PROCESS A TRANSACTION

## 1 NEW TRANSACTION / SALE

You are now ready to process a transaction. Be sure you selected your **Entry Mode**. (See page 9.)

1. Click the **New Transaction** tab.
2. Select the transaction type, for example: **Sale**.
3. Complete the required **Sale Information** fields marked with an \*.
4. Click **Checkout** when complete.

CHASE J.P.Morgan | Online POS Terminal | Welcome | Help | Alerts | Administration | Log Out

1. New Transaction | Transaction Management | Reporting | Quick Batch View

2. Sale | Refund | Other | Gift Card

Card Sale | Test MID | MID #: 7000000101012 / TID #: 001

3. Sale Information | Entry Mode: IPP320

Amount \* | \$ | | | % | \$

Discount | % | | | % | \$

Surcharge | \$ | | | % | \$

Tax | % | | | 7

Total

NOTE: You created the optional fields by selecting Hide or Show under Administration during the setup process.

Additional Prompting

Invoice Number \* | | |

Customer Reference | | |

Cardholder Verification

Customer Name | | |

Card Verification # | | |

Street Address | | |

Postal Code | | |

4. Checkout | Clear

## PROCESS A TRANSACTION



The PIN pad is now ready to process a transaction. Be sure you selected your **Entry Mode** (iPP 320) under the **Gear Icon**.

The iPP 320 PIN Pad Display Screen will ask your client to choose their method of entry:

**Insert** – Chip Card Transaction

**Swipe** – Swipe Card (no chip)

**Tap** – Contactless Card or Mobile Wallet

Below are the screen images that your customer will see when using the iPP 320.



# PRINT, EMAIL OR TEXT RECEIPTS

## 1 NEW TRANSACTION / SALE

Upon successfully processing a transaction, you will receive **Transaction Complete** (see below). You have several receipt options. You can send a digital receipt to your customer using a mobile phone number and/or email address. You can also print your merchant copy and/or customer receipt copies.

The Epson® T20 thermal receipt printer offers speed, cost savings and convenience. Contact us to discuss purchasing one for your business today.

The screenshot displays the Chase J.P. Morgan Online POS Terminal interface. At the top, the logo and 'Online POS Terminal' text are visible, along with user information: 'Welcome, Alerts | Administration | Log Out'. The main navigation bar includes 'New Transaction' (highlighted with a red '1'), 'Transaction Management', and 'Reporting'. Below this, there are tabs for 'Sale', 'Refund', 'Other', and 'Gift Card'. The central area shows a large 'Transaction Complete' message with a green checkmark and the text: 'This Sale for \$2.00 has been Approved'. To the right, there is a 'Test MID' button and a gear icon, with 'MID #: 70000001012 / TID #: 001' displayed below. The 'Receipts' section is divided into two columns: 'Send Electronic Receipts' and 'Print Receipts'. The 'Send Electronic Receipts' section includes a note: 'If your customer would like a receipt sent to them electronically, enter an email address and/or a phone number that accepts SMS text messages.' It features input fields for 'Customer Phone #' and 'Customer Email', and a 'Send Customer Receipt' button. The 'Print Receipts' section includes a note: 'Use the buttons below to print a customer receipt, a merchant receipt, or both receipts.' It features three buttons: 'Print Customer Receipt', 'Print Merchant Receipt', and 'Print Both Receipts'. At the bottom, there is a 'Transaction Details' section and a 'Bank Response' section.

# PROCESS A REFUND OR CREDIT TRANSACTION

## 1 NEW TRANSACTION / REFUND

1. Click the **New Transaction** tab.
2. Select the **Refund** tab.
3. Complete the required **Refund Information** fields marked with an \*.
4. Click the **Checkout** button to complete the transaction.

**CHASE** J.P.Morgan | Online POS Terminal

Welcome Alerts Administration Log Out

1. New Transaction Transaction Management Reporting Quick Batch View

2. Refund Other Gift Card

Card Refund QA CN & VI Both Retail N MID #: 70000007815 / TID #: 003

Sale Information Entry Mode Manual Entry

Amount \* \$

3. Additional Prompting

Invoice Number \* Customer Reference

Payment Information

Card Number \* Expiration Date \* 04 2016

4. Checkout Clear

**NOTE:** Select **Manual Entry** under **Entry Mode** if you need to manually enter the card information. If the customer is still present, swipe, insert or tap their card using the iPP 320 PIN Pad.

## SETTLE OPEN TRANSACTIONS – QUICK BATCH VIEW

### 3 REPORTING

New with Online POS Terminal – if you did not enable **Auto Settlement**, you can select the **Quick Batch View/Cloud Icon** to manually settle your batch.

### 6 QUICK BATCH VIEW – NEW WITH ONLINE POS!

CHASE J.P.Morgan | Online POS Terminal | Welcome | Alerts | Administration | Log Out

Home | New Transaction | Transaction Management | **3 Reporting** | **6 Quick Batch View** | Home

### Reporting

Queued Reports | Card Type Summary | Sales Trends

#### Queued Reports

Status	Report Name	Report Type
Complete	Closed Batch Detail	PDF

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#### Open Batch

Sales	17	\$1,673.38
Refunds	0	\$0.00
<b>Total</b>	<b>17</b>	<b>\$1,673.38</b>

View Items | Settle Batch

#### Rejected Transactions

View Items | Re-Settle

Auto Settlement will occur daily at 10:45 AM Indiana-0500

**NOTE:**  
You can **View Items**, and select **Settle Batch** to quickly close your batch. You can view **Rejected Transactions**, and **Re-Settle Transactions** too.

**Remember:** You must settle transactions in order to receive funding. Debit and gift card transactions are settled automatically at 5 a.m. EST. Credit card transactions can be auto-settled or settled manually. Unsettled transactions will remain in an **open** status view for four months.

# BACK OFFICE – TRANSACTION MANAGEMENT

## 2 TRANSACTION MANAGEMENT

View transactions in your open batch, or search for transactions already settled. Use the **Transactions** drop-down to look up **All**, **Open**, **Pending** or **Rejected** items. Search transactions by **Date Range**, **Account Number** (Last 4 digits), or **Amount Range**.

**CHASE** **J.P.Morgan** | Online POS Terminal | Help **2** Alerts | Administration | Log Out | Welcome

**Transaction Management** | Reporting | Quick Batch View

**Transaction Management** | QA CN & VI Both Retail N | MID #: 700000007815 / TID #: 001

**Transactions**: Open Transactions  
**Account Number**: Last 4 digits  
**Date Range**: 4/6/2016 to 04/06/2016  
**Amount Range**: \$ Low to High

Advanced Search

Search Report Reset Form

Date	Card T...	Card B...	Last 4	Transaction		Invoice...	Amount	Batch ...
				Type	Status			
<b>0 transactions</b>							<b>\$0.00</b>	

# BACK OFFICE – CALENDAR

## 2 TRANSACTION MANAGEMENT

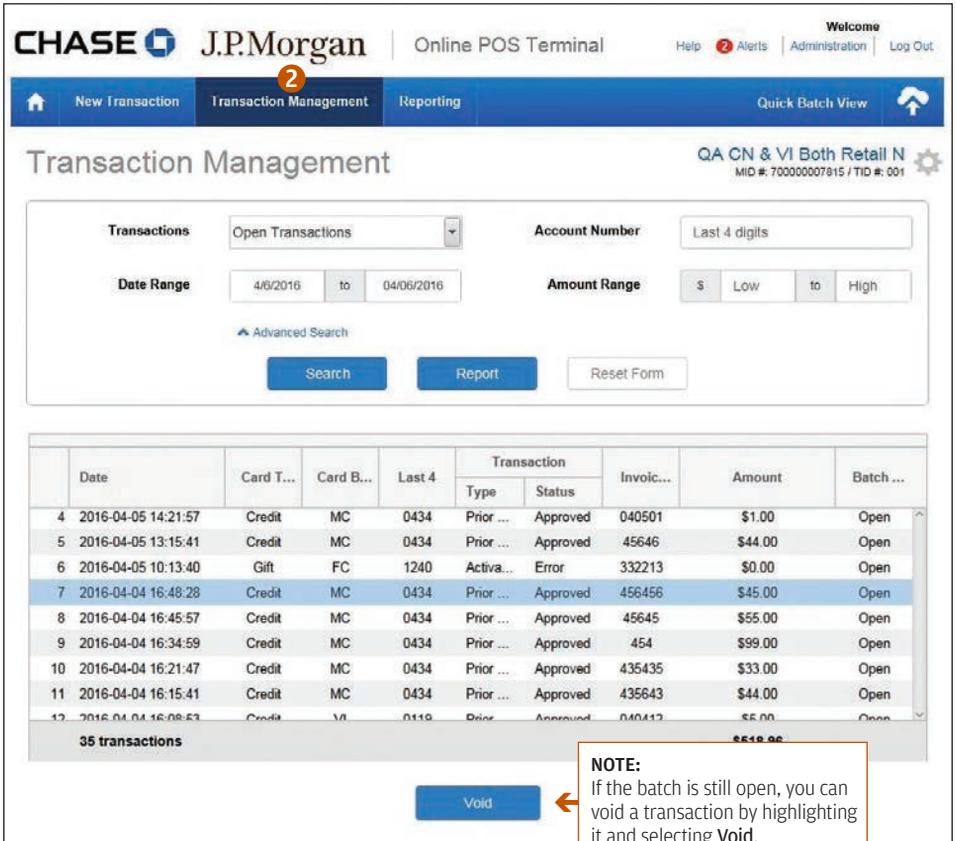
Use the **Date Range** to pull up the calendar and select the date you want to review. By selecting today's date, you will see any open transactions in the open batch if not yet settled.

The screenshot displays the 'Transaction Management' interface. At the top, the Chase J.P.Morgan logo and 'Online POS Terminal' are visible. The navigation bar includes 'New Transaction', 'Transaction Management' (highlighted with a red '2'), and 'Reporting'. A 'Quick Batch View' button is also present. The main content area shows search filters: 'Transactions' set to 'Open Transactions', 'Account Number' set to 'Last 4 digits', 'Date Range' set to '4/8/2016 to 04/08/2016', and 'Amount Range' set to '\$ Low to High'. A calendar for March and April 2016 is shown, with the date '6' in April highlighted. Below the calendar, there are columns for 'Date', 'Amount', and 'Batch ...'. At the bottom, it shows '0 transactions' and '\$0.00'.

# BACK OFFICE – VOID

## 2 TRANSACTION MANAGEMENT

If the transaction is in an open batch, you can use **Void** to remove it without charging your customer.



**CHASE** | J.P.Morgan | Online POS Terminal

Welcome | Help | Alerts | Administration | Log Out

New Transaction | **Transaction Management** | Reporting | Quick Batch View

### Transaction Management

QA CN & VI Both Retail N  
MID #: 70000007915 / TID #: 001

Transactions: Open Transactions | Account Number: Last 4 digits

Date Range: 4/6/2016 to 04/06/2016 | Amount Range: \$ Low to High

Advanced Search

Search | Report | Reset Form

	Date	Card T...	Card B...	Last 4	Transaction		Invoic...	Amount	Batch ...
					Type	Status			
4	2016-04-05 14:21:57	Credit	MC	0434	Prior ...	Approved	040501	\$1.00	Open
5	2016-04-05 13:15:41	Credit	MC	0434	Prior ...	Approved	45646	\$44.00	Open
6	2016-04-05 10:13:40	Gift	FC	1240	Activa...	Error	332213	\$0.00	Open
7	2016-04-04 16:48:28	Credit	MC	0434	Prior ...	Approved	456456	\$45.00	Open
8	2016-04-04 16:45:57	Credit	MC	0434	Prior ...	Approved	45645	\$55.00	Open
9	2016-04-04 16:34:59	Credit	MC	0434	Prior ...	Approved	454	\$99.00	Open
10	2016-04-04 16:21:47	Credit	MC	0434	Prior ...	Approved	435435	\$33.00	Open
11	2016-04-04 16:15:41	Credit	MC	0434	Prior ...	Approved	435643	\$44.00	Open
12	2016-04-04 16:08:53	Credit	MC	0434	Prior ...	Approved	040412	\$5.00	Open
<b>35 transactions</b>								<b>\$518.00</b>	

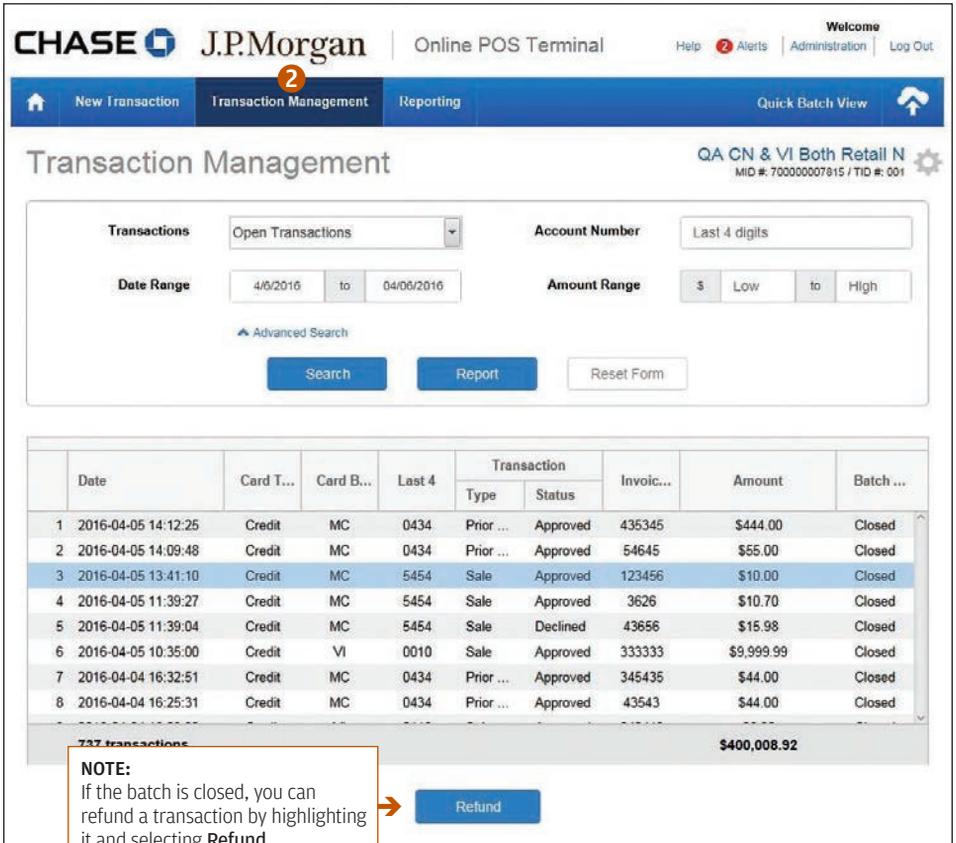
Void

**NOTE:** If the batch is still open, you can void a transaction by highlighting it and selecting Void.

# BACK OFFICE – REFUND

## 2 TRANSACTION MANAGEMENT

If the transaction is in a closed batch, you will see **Refund** on this screen. You can refund the entire amount, or refund a portion of the original purchase.



**CHASE** | **J.P.Morgan** | Online POS Terminal | Welcome | Help | Alerts | Administration | Log Out

New Transaction | **Transaction Management** | Reporting | Quick Batch View

### Transaction Management

QA CN & VI Both Retail N  
MID #: 70000007915 / TID #: 001

Transactions: Open Transactions | Account Number: Last 4 digits

Date Range: 4/6/2016 to 04/06/2016 | Amount Range: \$ Low to High

Advanced Search

Search | Report | Reset Form

	Date	Card T...	Card B...	Last 4	Transaction		Invoic...	Amount	Batch ...
					Type	Status			
1	2016-04-05 14:12:25	Credit	MC	0434	Prior ...	Approved	435345	\$444.00	Closed
2	2016-04-05 14:09:48	Credit	MC	0434	Prior ...	Approved	54645	\$55.00	Closed
3	2016-04-05 13:41:10	Credit	MC	5454	Sale	Approved	123456	\$10.00	Closed
4	2016-04-05 11:39:27	Credit	MC	5454	Sale	Approved	3626	\$10.70	Closed
5	2016-04-05 11:39:04	Credit	MC	5454	Sale	Declined	43656	\$15.98	Closed
6	2016-04-05 10:35:00	Credit	VI	0010	Sale	Approved	333333	\$9,999.99	Closed
7	2016-04-04 16:32:51	Credit	MC	0434	Prior ...	Approved	345435	\$44.00	Closed
8	2016-04-04 16:25:31	Credit	MC	0434	Prior ...	Approved	43543	\$44.00	Closed
737 transactions								\$400,008.92	

NOTE: If the batch is closed, you can refund a transaction by highlighting it and selecting Refund.

Refund

## REPORTING (UNDER THE TRANSACTION MANAGEMENT TAB)

### 2 TRANSACTION MANAGEMENT / REPORT

If you choose the **Report** button versus **Search**, you can create and view reporting for your search results.

The screenshot shows the Chase J.P. Morgan Online POS Terminal interface. At the top, there is a navigation bar with the Chase and J.P. Morgan logos, the text "Online POS Terminal", and user options: "Welcome, Alerts", "Administration", and "Log Out". Below this is a secondary navigation bar with tabs for "New Transaction", "Transaction Management" (which is highlighted with a red circle containing the number 2), and "Reporting". There is also a "Quick Batch View" button and a home icon.

The main content area is titled "Transaction Management" and includes a "Test MID" label with a gear icon and the text "MID #: 700000001012 / TID #: 001". Below this is a search form with the following fields:

- Transactions:** A dropdown menu currently set to "Open Transactions".
- Account Number:** A text input field containing "Last 4 digits".
- Date Range:** Two date input fields with "4/25/2016" and "05/12/2016" respectively, separated by a "to" label.
- Amount Range:** A text input field containing "\$", followed by "Low", "to", and "High" buttons.

Below the search fields is a link for "Advanced Search". At the bottom of the form are three buttons: "Search" (blue), "Report" (blue with an orange arrow pointing right), and "Reset Form" (white with a grey border).

## REPORTING (UNDER THE TRANSACTION MANAGEMENT TAB)

### 2 TRANSACTION MANAGEMENT / REPORT

If you choose **Report**, you will be asked to select the **Report Type**. Select **CSV** (comma-separated values) to export transactions to Excel or, if you only want to print the report, select **PDF**.

The screenshot displays the Chase J.P.Morgan Online POS Terminal interface. The top navigation bar includes 'New Transaction', 'Transaction Management' (with a '2' icon), and 'Reporting'. The 'Transaction Management' section is active, showing search filters for 'Transactions' (Open Transactions), 'Date Range' (4/25/2016 to 05/12/2016), 'Account Number' (Last 4 digits), and 'Amount Range' (\$ Low to High). A 'Report' button is highlighted, and a 'Generate Report' dialog box is open, showing 'Report Type' options for CSV and PDF. The 'CSV' option is selected, and a 'Queue Report' button is visible.

# REPORTING (UNDER THE TRANSACTION MANAGEMENT TAB)

## TRANSACTION MANAGEMENT / REPORT

Access Batch History by selecting:

- 1 DATE RANGE
- 2 BATCH RANGE



Online POS Terminal

Welcome,  
[Help](#) | [Alerts](#) | [Administration](#) | [Log Out](#)

Home
New Transaction
Transaction Management
Reporting
Quick Batch View
↑

Transaction | Batch

### Batch History

Test MID   
MID #: 70000001012 / TID #: 001

**1** Date Range

to

**2** Batch Range

to

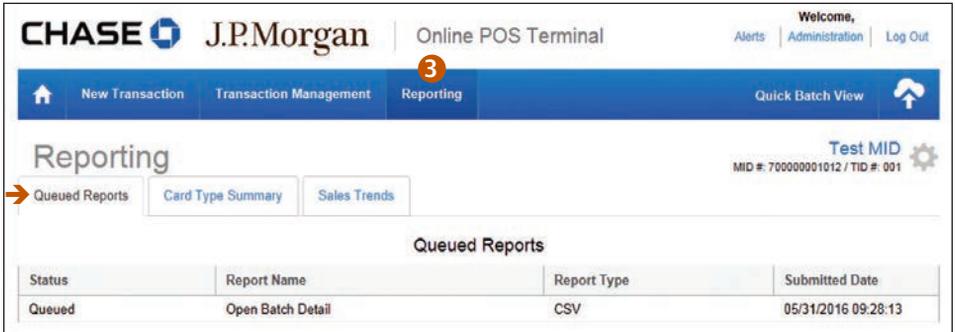
Search
Report
Reset Form

	Date	Batch Number	Amount	Batch Status
1	2018-08-22 14:46:06	000084	\$16.00	Closed
2	2018-08-18 14:45:03	000083	\$61.05	Closed
3	2018-08-01 14:48:03	000082	\$10.00	Closed
4	2018-07-13 17:27:07	000081	\$1.10	Closed
5	2018-05-04 14:48:04	000080	\$15.75	Closed
6	2017-12-20 14:49:07	000079	\$13.60	Closed
7	2017-11-04 14:47:04	000078	\$61.49	Closed
8	2017-10-17 14:46:03	000077	\$23.28	Closed
9	2017-10-14 14:46:03	000076	\$27.16	Closed
10	2017-10-13 14:46:06	000075	\$21.01	Closed
17 batches			\$580.89	

## REPORTING (UNDER THE REPORTING TAB)

### 3 REPORTING / QUEUED REPORTS

After you create reporting, the report will show as **Queued** under **Queued Reports**. When the report is ready for you to access, the status will show as **Complete**.



The screenshot displays the Chase J.P. Morgan Online POS Terminal interface. The top navigation bar includes 'New Transaction', 'Transaction Management', and 'Reporting' (highlighted with a red '3'). Below the navigation bar, the 'Reporting' section is active, showing a 'Queued Reports' tab. A table titled 'Queued Reports' contains the following data:

Status	Report Name	Report Type	Submitted Date
Queued	Open Batch Detail	CSV	05/31/2016 09:28:13

## REPORTING (UNDER THE REPORTING TAB)

### 3 REPORTING / CARD TYPE SUMMARY

You can get a quick glance of card type activity by day, week, month or quarter.

The screenshot shows the 'Reporting' section of the Chase J.P. Morgan Online POS Terminal. The 'Reporting' tab is selected, and the 'Card Type Summary' report is active. The report displays sales and refund data for MasterCard, with a grand total of 4 transactions and \$18.04 in sales. A dropdown menu is open, showing options for 'Today', 'Yesterday', 'Last Week', 'Last Month', and 'Last Quarter' to view the data for different time periods.

Card Brand	Sales		Refund		Total	
	Count	Amount	Count	Amount		Amount
MasterCard	4	\$18.04	0	\$0.00		
<b>Grand Total</b>	<b>4</b>	<b>\$18.04</b>	<b>0</b>	<b>\$0.00</b>		<b>\$18.04</b>

# REPORTING (UNDER THE REPORTING TAB)

## 3 REPORTING / SALES TRENDS

Select **Sales Trends** to view your transaction activity. Search by Date Range.

The screenshot displays the 'Reporting' interface for the Chase J.P.Morgan Online POS Terminal. The 'Reporting' tab is active, and the 'Sales Trends' sub-tab is selected. A date range of 3/1/2016 to 3/7/2016 is specified, and a search is performed. The resulting bar chart shows a single bar for 03/03/2016 with a value of \$2.00. Below the chart is a summary table with the following data:

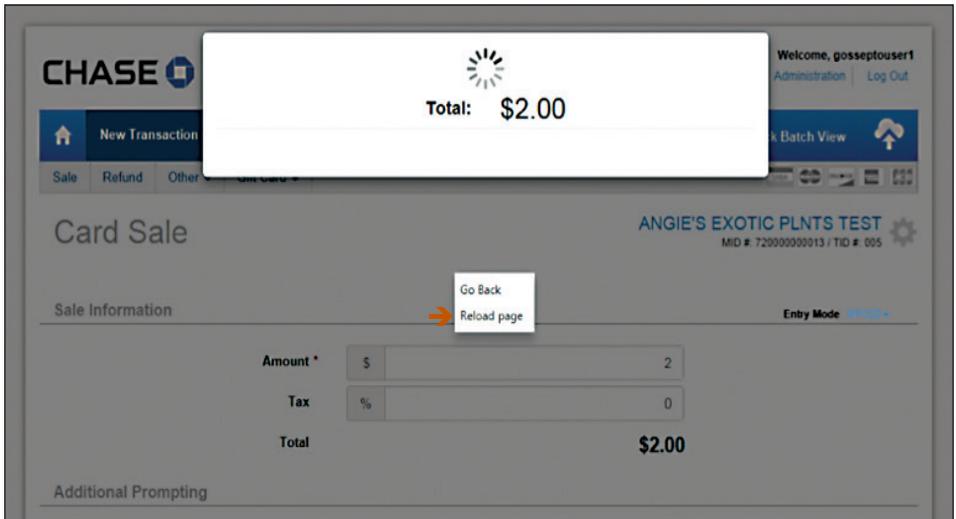
Date	Transactions	Number of Batches	Amount
3/3/2016	1	1	\$2.00

## SUPPORT

### SCREEN LOCK

If your screen becomes locked during a transaction:

1. Right click your mouse.
2. Select **Reload Page**.
3. Repeat previous steps to complete the transaction.



### SUPPORT

- If you need further assistance and would like help from a member of our **Support Group**, call 1-800-503-1132.
- If you have a question about fees or need general support for your existing processing account, you can call **Chase Merchant Services** at 1-888-886-8869.

