



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.

CONTENTS

Start Here	4
Update to Java 8	4
Login	6
Navigating the Online POS Terminal	7
Setup	8
Process a Transaction	15
Print, Email or Text Receipts	17
Process a Refund or Credit Transaction	18
Auto Settle and Settle Open Transactions	19
Back Office	20
Reporting	24
Support	29

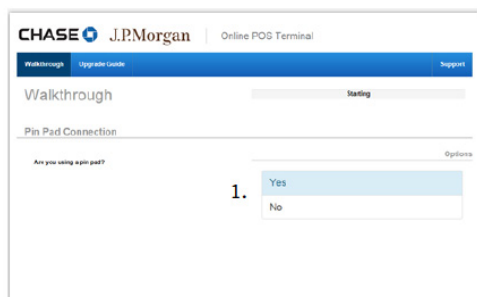
[← Previous](#) | [Table of Contents](#) | [Next →](#)

START HERE

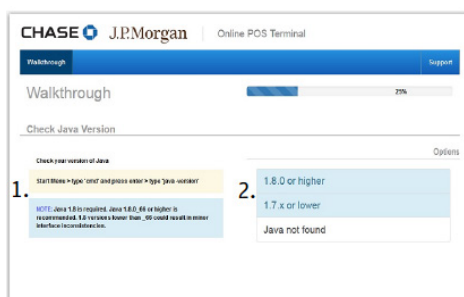
Thank you for choosing the Online POS Terminal. To begin accepting card payments, just follow these easy steps.

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 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

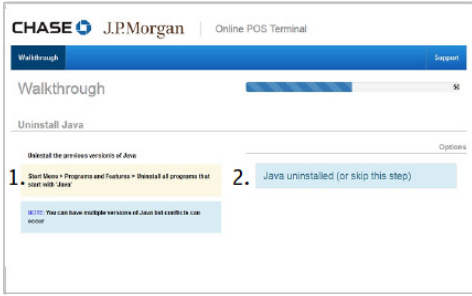


1. Enter www.chase.com/OnlinePosTerminal and select **Yes** if you received a PIN pad.

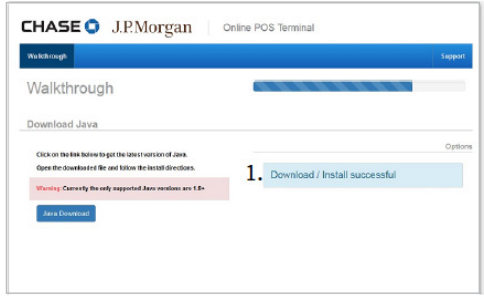


2. Follow instructions in 1. **Yellow Box** to check Java version. 2. Click the version in the **Blue Box**.

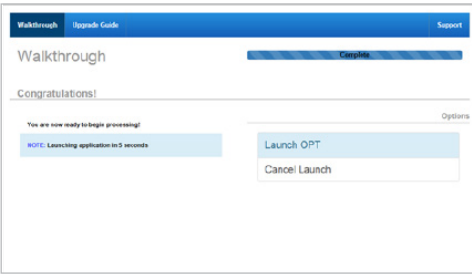
← Previous | Table of Contents | Next →



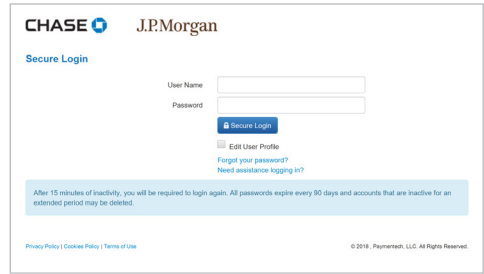
3. Follow instructions in 1. **Yellow Box** to uninstall Java version. 2. Click the **Blue Box** when completed.



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.

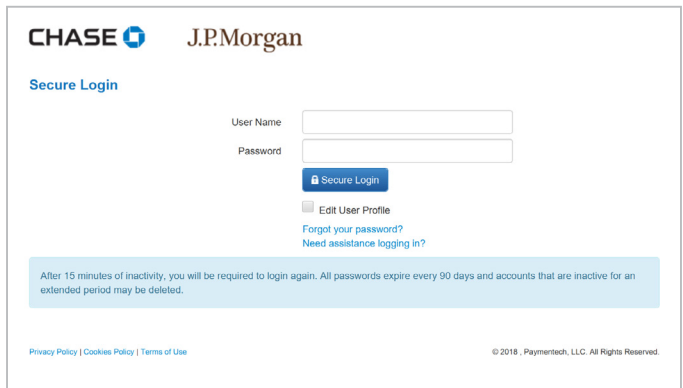



6. You will be presented the **Secure Login** screen. Follow the instructions on the next page to log in.

LOGIN

For future access, create a bookmarked link to the Online POS Terminal using: chase.com/OnlinePosTerminal 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

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.

[Privacy Policy](#) | [Cookies Policy](#) | [Terms of Use](#)

© 2018 | Paymentsch, LLC. All Rights Reserved.

[← Previous](#) | [Table of Contents](#) | [Next →](#)

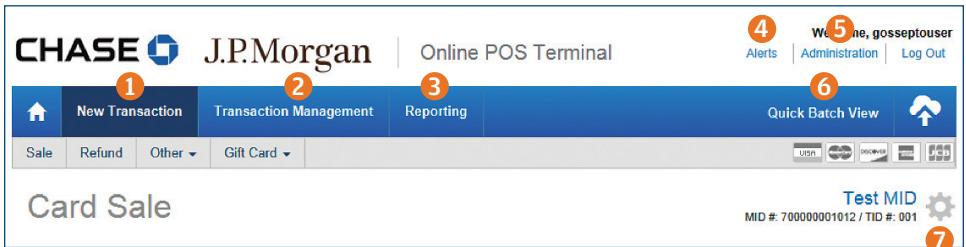
NAVIGATING THE ONLINE POS TERMINAL

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.

← Previous | Table of Contents | Next →

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.

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**.

Merchant DBA Name	MID #	TID #
Test MID	700000001012	001
Test MID	700000001012	002
Test MID	700000001012	003
CMC Mobile US	700000005017	001
CMC Mobile US	700000005017	002
CMC Mobile US	700000005017	003
CMC Mobile US	700000005017	004
CMC Mobile US	700000005017	005
CMC Mobile US	700000005017	006

← Previous | Table of Contents | Next →

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 Chase and J.P. Morgan logos are visible, along with the text 'Online POS Terminal' and 'Welcome, rBosso23'. There are links for 'Alerts', 'Administration', and 'Log Out'. The main navigation bar includes 'New Transaction' (highlighted with a '1'), 'Transaction Management', and 'Reporting'. A 'Quick Batch View' button is also present. Below the navigation bar, there are tabs for 'Sale', 'Refund', 'Other', and 'Gift Card'. The 'Card Sale' screen is active, showing 'QA CN & VI Both Retail N' and 'MID #: 700000007815 / TID #: 003'. The 'Sale Information' section has an 'Amount' field with a '\$' symbol and a text input box. The 'Entry Mode' dropdown menu is open, showing 'iPP 320' and 'Manual Entry' options. The 'Additional Prompting' section is visible at the bottom.

← Previous | Table of Contents | Next →

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.

The screenshot shows the 'Administration' page in the Chase J.P. Morgan Online POS Terminal. The page header includes the Chase and J.P. Morgan logos, the text 'Online POS Terminal', and links for 'Help', 'Alerts', 'Administration', and 'Log Out'. A navigation bar contains 'New Transaction', 'Transaction Management', 'Reporting', 'Quick Batch View', and a home icon. The main content area is titled 'Administration' and includes a sidebar with 'General', 'Transactions', 'Receipts', 'Settlement', and 'Device Management'. The 'General' section is active, showing 'Default MID' as 'QA CN & VI Both Retail N' with a gear icon. A 'NOTE' box states: 'NOTE: The Default Merchant ID you set under the Gear Icon earlier is displayed here.' A 'Select Merchant' modal window is open, displaying a table of merchant options.

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

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 displays the 'Administration' section of the Chase J.P.Morgan Online POS Terminal. The page is titled 'Administration' and includes a navigation menu on the left with options: General, Transactions (highlighted with a 'B'), Receipts, Settlement, and Device Management. The main content area is divided into several sections:

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

A **NOTE** box at the bottom left states: "NOTE: Click Update when complete." with an arrow pointing to the **Update** button at the bottom right.

SETUP – ADMINISTRATION

5 ADMINISTRATION

C RECEIPTS

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

CHASE **J.P.Morgan** | Online POS Terminal Help **5** 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.

Line 1

Line 2

Line 3

Line 4

Line 5

Line 6

Footer

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

Line 1

Line 2

Line 3

Line 4

NOTE: Click Update when complete. → [Update](#)

© Copyright 2018. Merchant services are provided by Paymentech, LLC ("Chase"). All Rights Reserved. [Privacy Policy](#) [Terms of Use](#)

← Previous | Table of Contents | Next →

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 Chase J.P.Morgan Online POS Terminal interface. The top navigation bar includes 'Home', 'New Transaction', 'Transaction Management', 'Reporting', and 'Quick Batch View'. The main header displays 'Administration' and 'QA CN & VI Both Retail N' with a gear icon. A left sidebar lists '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 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 orange border and 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 for an 'Online POS Terminal'. The left sidebar contains navigation options: General, Transactions, Receipts, Settlement, and Device Management (highlighted with an 'E' icon). The main content area is titled 'Device Management' and shows details for a device named 'iPP320'. The 'Device Name' field is set to 'Front Office PIN Pad' and has a 'Save' button next to it. Other fields include Device Serial # (2215233PT010054), Firmware Version # (1702), OS Version # (4612), Device Application Name (Retail Base), Manufacture ID (INGENICO), and Swipe Count (0127). There is an 'Update' button for EMV Parameters and a 'Last Update' date of April 1, 2016. A note box with an orange border and an arrow pointing to the Device Name field contains the following text:

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

3. Sale Information | Entry Mode: IPP320

Amount * | \$ | []

Discount | % | [] | % | \$

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.



[← Previous](#) | [Table of Contents](#) | [Next →](#)

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.

CHASE | J.P.Morgan | Online POS Terminal

Welcome, Alerts | Administration | Log Out

New Transaction | Transaction Management | Reporting | Quick Batch View

Sale | Refund | Other | Gift Card

Transaction Complete | Test MID | MID #: 70000001012 / TID #: 001

✓ This Sale for \$2.00 has been Approved

Receipts

Send Electronic Receipts
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.

Customer Phone #

Customer Email

Send Customer Receipt

Print Receipts
Use the buttons below to print a customer receipt, a merchant receipt, or both receipts.

Print Customer Receipt

Print Merchant Receipt

Print Both Receipts

Transaction Details

Bank Response

← Previous | Table of Contents | Next →

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.

The screenshot shows the Chase J.P. Morgan Online POS Terminal interface. At the top, there's a header with the Chase logo, J.P. Morgan name, and 'Online POS Terminal'. On the right, it says 'Welcome' and has links for 'Alerts', 'Administration', and 'Log Out'. Below the header is a navigation bar with three main tabs: 'New Transaction' (marked with a circled '1'), 'Transaction Management', and 'Reporting'. Under 'New Transaction', there are sub-tabs: 'Refund' (marked with a circled '2'), 'Other', and 'Gift Card'. The main content area is titled 'Card Refund'. It has a 'Sale Information' section with an 'Amount *' field containing '\$'. To the right, there's an 'Entry Mode' dropdown menu currently set to 'Manual Entry', with a callout box pointing to it. Below this is an 'Additional Prompting' section with 'Invoice Number *' and 'Customer Reference' fields. The 'Payment Information' section has 'Card Number *' and 'Expiration Date *' (04 / 2016) fields. At the bottom, there's a 'Checkout' button (marked with a circled '4') and a 'Clear' button. A callout box on the right says: '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 | **Reporting** | Quick Batch View | Home

Reporting

Queued Reports | Card Type Summary | Sales Trends

Queued Reports

Status	Report Name	Report Type
Complete	Closed Batch Detail	PDF

© Copyright 2016, Merchant services are provided by Paymentech, LLC ("Chase"). All Rights Reserved.

Open Batch

Sales	17	\$1,673.38
Refunds	0	\$0.00
Total	17	\$1,673.38

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.

← Previous | Table of Contents | Next →

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**.



J.P.Morgan | Online POS Terminal

Welcome 2 Alerts | [Administration](#) | [Log Out](#)

Home
Transaction Management
Reporting
Quick Batch View


Transaction Management

QA CN & VI Both Retail N
 MID #: 700000007815 / TID #: 001

→ **Transactions**

→ **Date Range** to

Advanced Search

→ **Account Number**

→ **Amount Range** \$ to

→

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

← Previous | Table of Contents | Next →

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.

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

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

Transaction Management

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

Transactions: Open Transactions | Account Number: Last 4 digits

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

March 2016							April 2016								
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa		
		1	2	3	4	5			3	4	5	6	7	8	9
6	7	8	9	10	11	12	10	11	12	13	14	15	16		
13	14	15	16	17	18	19	17	18	19	20	21	22	23		
20	21	22	23	24	25	26	24	25	26	27	28	29	30		
27	28	29	30	31											

Date	Amount	Batch ...
0 transactions		
\$0.00		

[← Previous](#) | [Table of Contents](#) | [Next →](#)

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 #: 70000007815 / 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
35 transactions								\$518.96	

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 | 2 Alerts | Administration | Log Out

Transaction Management | Reporting | Quick Batch View

QA CN & VI Both Retail N
MID #: 70000007815 / 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" (highlighted with a red circle and the number 2), and "Reporting". There are also links for "Quick Batch View" 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 #: 70000001012 / TID #: 001". The search filters are organized as follows:

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

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

← Previous | Table of Contents | Next →

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. At the top, the navigation bar includes 'New Transaction', 'Transaction Management' (with a '2' icon), and 'Reporting'. A 'Quick Batch View' button is also present. The main heading is 'Transaction Management', with 'Test MID' and 'MID #: 70000001012 / TID #: 001' displayed on the right. The search filters include:

- Transactions:** Open Transactions
- Date Range:** 4/25/2016 to 05/12/2016
- Account Number:** Last 4 digits
- Amount Range:** \$ Low to High

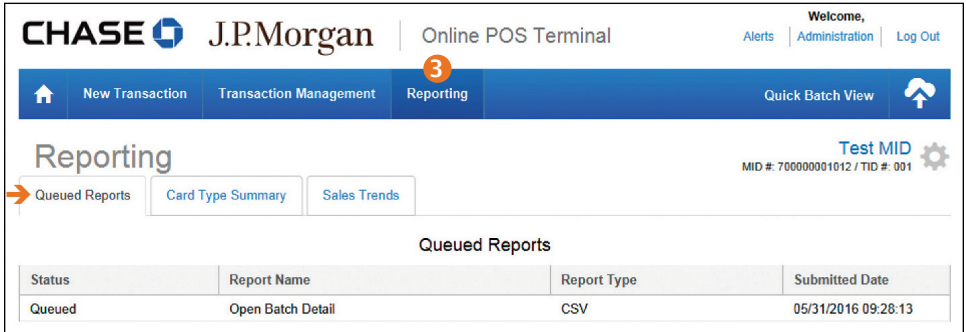
 Below the filters are 'Advanced Search', 'Search', 'Report', and 'Reset Form' buttons. The 'Report' button is highlighted with an orange arrow. A 'Generate Report' dialog box is overlaid, showing 'Report Type' options: CSV (selected) and PDF. A 'Queue Report' button is at the bottom of the dialog.

← Previous | Table of Contents | Next →

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'). The 'Reporting' section has three tabs: 'Queued Reports' (selected), 'Card Type Summary', and 'Sales Trends'. A table titled 'Queued Reports' shows the following data:

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

← Previous | Table of Contents | Next →

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 Chase J.P. Morgan Online POS Terminal interface. At the top, there is a navigation bar with 'New Transaction', 'Transaction Management', and 'Reporting' (highlighted with a red '3'). Below this is a 'Reporting' section with tabs for 'Queued Reports', 'Card Type Summary' (selected), and 'Sales Trends'. A dropdown menu for 'Last Quarter' is open, showing options for 'Today', 'Yesterday', 'Last Week', 'Last Month', and 'Last Quarter'. The main content area displays a 'Card Type Summary' table with columns for Card Brand, Sales (Count and Amount), and Refund (Count and Amount). The data shows 4 MasterCard transactions totaling \$18.04 in sales and \$0.00 in refunds. A 'Grand Total' row is also present. The interface includes a 'Welcome' message, 'Alerts', 'Administration', and 'Log Out' links, and a 'Quick Batch View' button.


Card Brand	Sales		Refund		Total	
	Count	Amount	Count	Amount	Count	Amount
MasterCard	4	\$18.04	0	\$0.00		
Grand Total	4	\$18.04	0	\$0.00		\$18.04

← Previous | Table of Contents | Next →

REPORTING (UNDER THE REPORTING TAB)

3 REPORTING / SALES TRENDS


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



Online POS Terminal


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

Home
New Transaction
Transaction Management
3 Reporting

Quick Batch View 

Reporting

Queued Reports
Card Type Summary
Sales Trends

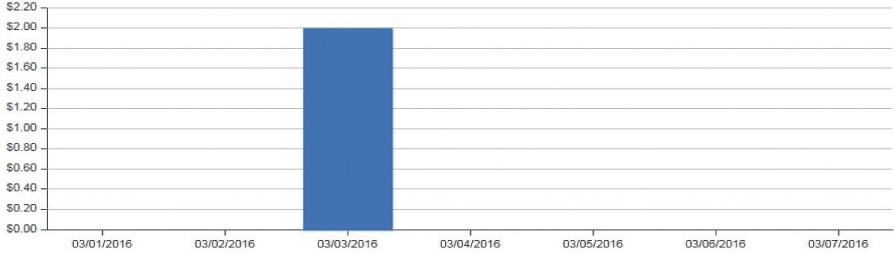
Test MID 
 MID #: 7000000101012 / TID #: 001

Sales Trends

➔
Date Range

3/1/2016
to
3/7/2016

Search



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

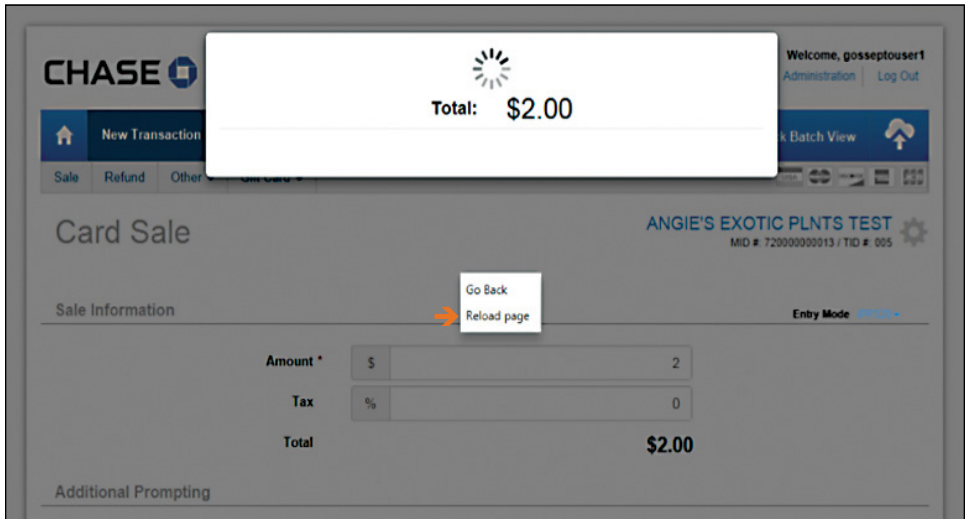
[← Previous](#) | [Table of Contents](#) | [Next →](#)

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.

← Previous | Table of Contents | Next →

