



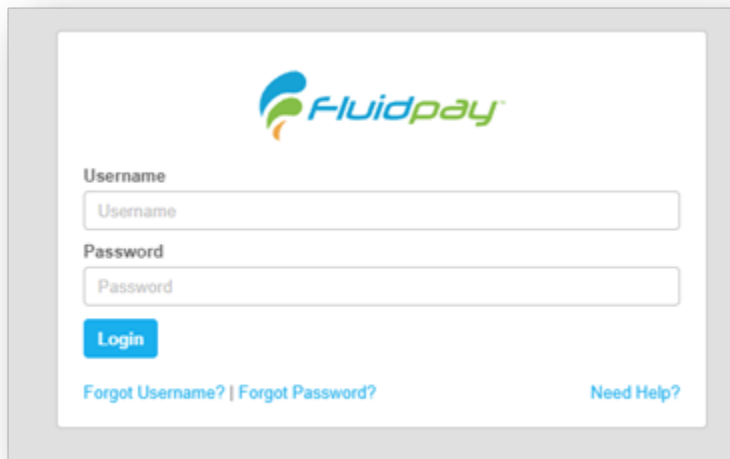
MID: _____

[Fluidpay/ Pay Proudly Gateway Support](#) | 630.526.8670 Opt. 2 | help@fluidpay.com

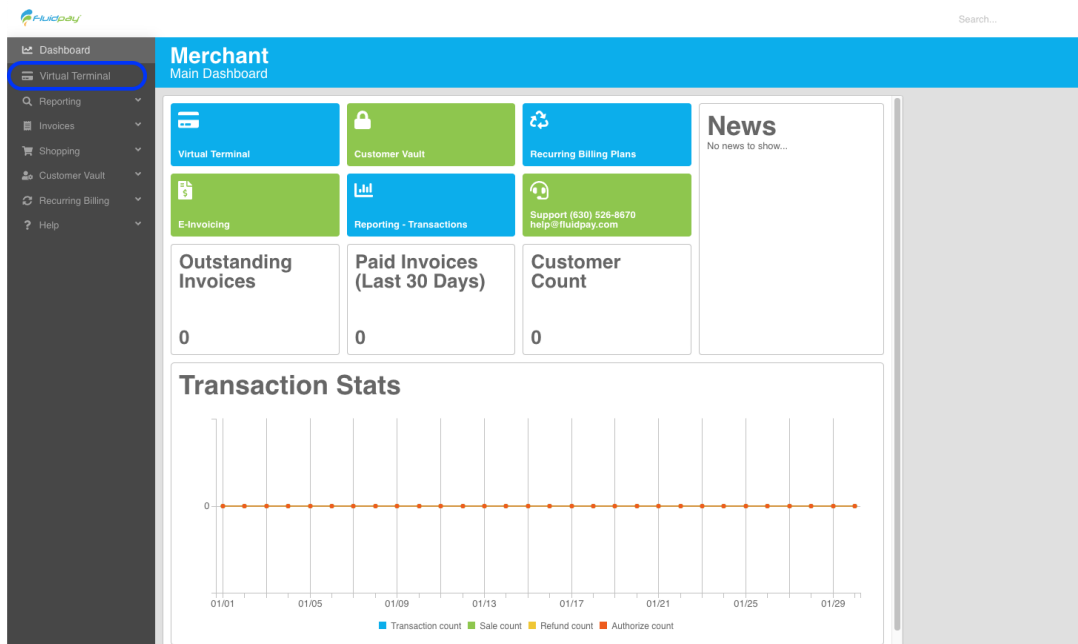
Instructions for Using Fluidpay/ Proudly Gateway

Virtual Terminal Sale images may appear slightly different)
Last updated February 22, 2022 at 11:41 AM

1. Navigate to <https://app.payproudlygateway.com/merchant/dashboard>



2. Enter your username and password and click 'Login'



3. Click 'Virtual Terminal' from the menu on the left.

Virtual Terminal

Process Payment

Amount *
Sale \$ 0.00 USD

Total: \$0.00

Card Token

Card Number * Exp * CVC
Card Number MM/YY CVC

Details

Processor
test / Default

Payment Adjustment
No Adj

Tax Amount \$0.00 Shipping Amount \$ 0.00

Add Tax To Total Tax Exempt

Description
Description

Order Id 094/f8sdl59 PO Number 60585

Email Receipt Yes No Allow Partial Yes No Vault Record Yes No

Vault Record ID

Line Items

Billing Contact Shipping Contact

Submit Total: \$0.00

4. Fill out the form with the transaction information. (required fields will be marked with *) Click the drop-down carats to reveal additional transaction information you may collect. (Line Items, Billing Contact, Shipping Contact).
5. Once you have filled out the form click the green 'Submit' button.

6. You will see a Transactions Detail screen

Transactions

Detail

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[Print View](#) [Email Transaction](#) [Vault](#) Declined



General

ID:	c80ph146lr8qlnrr9i60
Type:	sale
Response:	declined
Response Code:	300 - Gateway error
Payment Method:	card
Tax Exempt:	false
Source:	cp
User Name:	kelly2_quinn
Processor Type:	nmi
Processor Id:	c0e455s5670o79ta5d60
Processor Name:	test
Created At:	02/07/2022 3:10:28 pm
Updated At:	02/07/2022 3:10:29 pm
Description:	Test transaction

Amount

Total Amount: \$5.00

Credit Card

 545454*****5454  04/25

Processor Response Text: 300 - Authentication Failed

Processor Transaction Id: 0

Line Items

Testing Testing			\$5.00
Test Item			
Quantity	Unit Price	Discount	
1	\$5.00	\$0.00	
Shipped	Freight Amount	Unit of Measure	
0	\$0.00	Select Unit of Measure	
Taxable	Local Tax	National Tax	
<input type="checkbox"/>	% 0.000	% 0.000	

Transaction Features

[Card Verification](#)

Billing Address

No billing address was set.

Shipping Address

No shipping address was set.

7. From here you can see if the transaction was successful or not (including the response code). You can print the receipt by clicking the green 'Print View' button or email the receipt by clicking the blue 'Email Transaction' button.

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[Print View](#) [Email Transaction](#) [Vault](#)

[Process](#) [Cancel](#)

8. Enter the email address you wish to email the receipt to be sent to and then click the blue 'Process' button.
























Viewing and Modifying Transactions

1. Click on the Reporting drop-down and select 'Transactions':

The screenshot shows the Fluidpay Merchant Main Dashboard. The left sidebar contains a navigation menu with 'Reporting' expanded and 'Transactions' highlighted. The main content area features several widgets: 'Virtual Terminal', 'Customer Vault', 'Recurring Billing Plans', 'E-Invoicing', 'Reporting - Transactions', and 'Support (630) 526-8670 help@fluidpay.com'. Below these are three summary cards: 'Outstanding Invoices' (0), 'Paid Invoices (Last 30 Days)' (0), and 'Customer Count' (1). A 'News' section on the right shows 'No news to show...'. At the bottom, a 'Transaction Stats' chart displays zero activity for Transaction count, Sale count, Refund count, and Authorize count from 01/01 to 01/29.

2. This will bring up a list of transactions, you can search using the date range or any of the additional fields provided:

The screenshot shows the Fluidpay Transactions Search page. The search criteria are set to 'Created Date Range' between 2022-01-01 and 2022-01-26. The search results table shows seven transactions with columns for Actions, Card Holder Name, Type, Payment Method, Masked Account, Amount, Status, and Created.

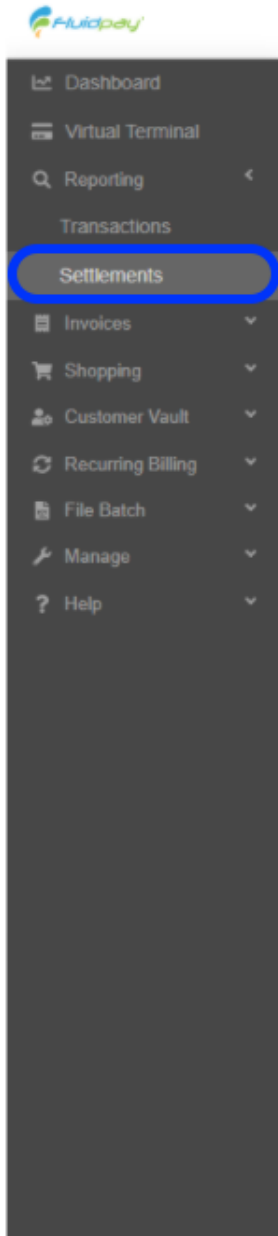
Actions	Card Holder Name	Type	Payment Method	Masked Account	Amount	Status	Created
   		Sale	card	XXXXXXXXXX	\$47.84	Pending Settlement	01/26/2022 3:33:41 pm
   		Sale	card	XXXXXXXXXX	\$41.86	Settled	01/26/2022 12:13:06 am
   		Sale	card	XXXXXXXXXX	\$152.24	Settled	01/25/2022 11:38:35 pm
  		Sale	card	XXXXXXXXXX	\$152.24 (\$0.00)	Declined	01/25/2022 11:37:41 pm
   		Sale	card	XXXXXXXXXX	\$36.40	Settled	01/25/2022 10:42:19 pm
   		Sale	card	XXXXXXXXXX	\$67.59	Settled	01/25/2022 10:17:07 pm

3. Once you click 'Search' you will see a list of all the transactions that match those search criteria.
4. Clicking the blue 'i' information icon will take you to the transaction details.
5. The blue 'R' icon will run a refund on the transaction.
6. The yellow envelope icon will email a receipt.

7. The green box icon will let you store the transaction in a 'vault' so that you can use it again in the future.
8. You can export the transactions into a CSV by clicking the green 'Download as CSV' button at the bottom of the screen.

Viewing Settlements

9. Click on the Reporting drop-down and select 'Settlements'



10. You will see the settlements search screen

Batch Date	Processor ID	Processor Name	# Trans	Captured	Base	Credit	Surcharge	Payment Adj	Net
01/19/2022		Payroc	8	\$908.93	\$881.96	\$0.00	\$26.97	\$0.00	\$908.93
01/20/2022		Payroc	10	\$1,031.51	\$1,005.75	\$0.00	\$25.76	\$0.00	\$1,031.51
01/21/2022		Payroc	4	\$230.30	\$224.00	\$0.00	\$6.30	\$0.00	\$230.30
01/22/2022		Payroc	6	\$488.17	\$477.20	\$0.00	\$10.97	\$0.00	\$488.17
01/23/2022		Payroc	12	\$1,055.77	\$1,021.69	\$0.00	\$34.08	\$0.00	\$1,055.77
01/24/2022		Payroc	3	\$212.13	\$206.75	\$0.00	\$5.38	\$0.00	\$212.13
01/25/2022		Payroc	8	\$636.29	\$614.59	\$0.00	\$21.70	\$0.00	\$636.29
01/26/2022		Payroc	8	\$613.42	\$605.63	\$0.00	\$7.79	\$0.00	\$613.42
			59	\$5,176.52	\$5,037.57	\$0.00	\$138.95	\$0.00	\$5,176.52

Action	ID	Processor Name	Response	# Trans	Captured	Base Amount	Credited	Surcharge	Payment Adj
🔍			100 - ACCEPT	8	\$613.42	\$605.63	\$0.00	\$7.79	\$0.00
🔍			100 - ACCEPT	8	\$636.29	\$614.59	\$0.00	\$21.70	\$0.00
🔍			100 - ACCEPT	3	\$212.13	\$206.75	\$0.00	\$5.38	\$0.00
🔍			100 - ACCEPT	12	\$1,055.77	\$1,021.69	\$0.00	\$34.08	\$0.00

11. You can use the search options to view certain time periods.

12. You can see a summary of settlements on the top that gives an overview of previous settlements including credits, and payment adjustments for RewardPay.

13. If you click the magnifying glass next to the ID on the Results section it will display the transactions that make up that settlement.

Actions	Card Holder Name	Type	Payment Method	Masked Account	Amount	Status	Created
🔍 🗑️ 📧 📄		Sale	card	XXXXXXXXXX	\$47.84	Pending Settlement	01/26/2022 3:33:41 pm
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14. From here you can export to a CSV by clicking the green 'Download as CSV' button.

Voiding a Sale

1. On the transaction detail screen click the orange void button