Getting Started with Swipe Checkout

What's Inside

Hi! So you're all signed up as a Swipe Checkout merchant and the way you sell online is going to be easier than ever before. In this guide we are going to give you the basics on how to get started with and use Swipe Checkout to grow your business. Simple, no headaches.

In this guide you will learn how to:

- Create transactions
- View transactions
- Create and manage invoices
- Manage your customers
- View reports
- Settle transactions
- Manage products

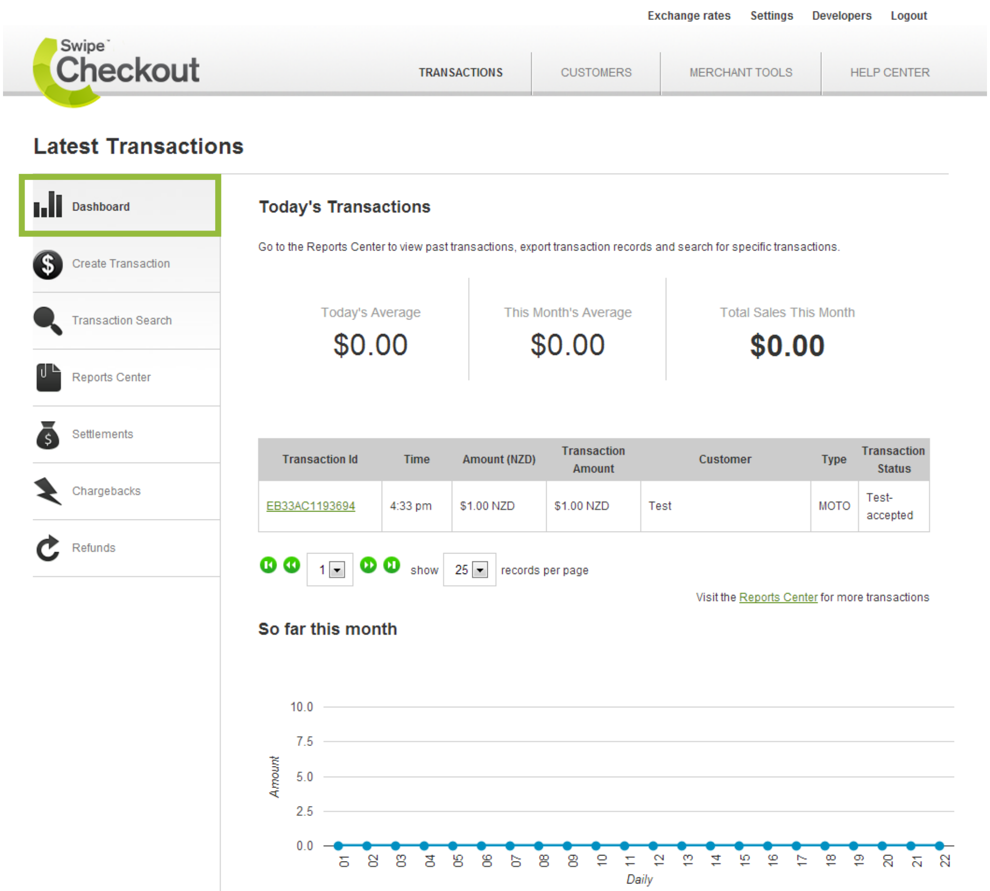
If you have any questions contact our help centre.

Let's get started

Viewing and Creating Transactions

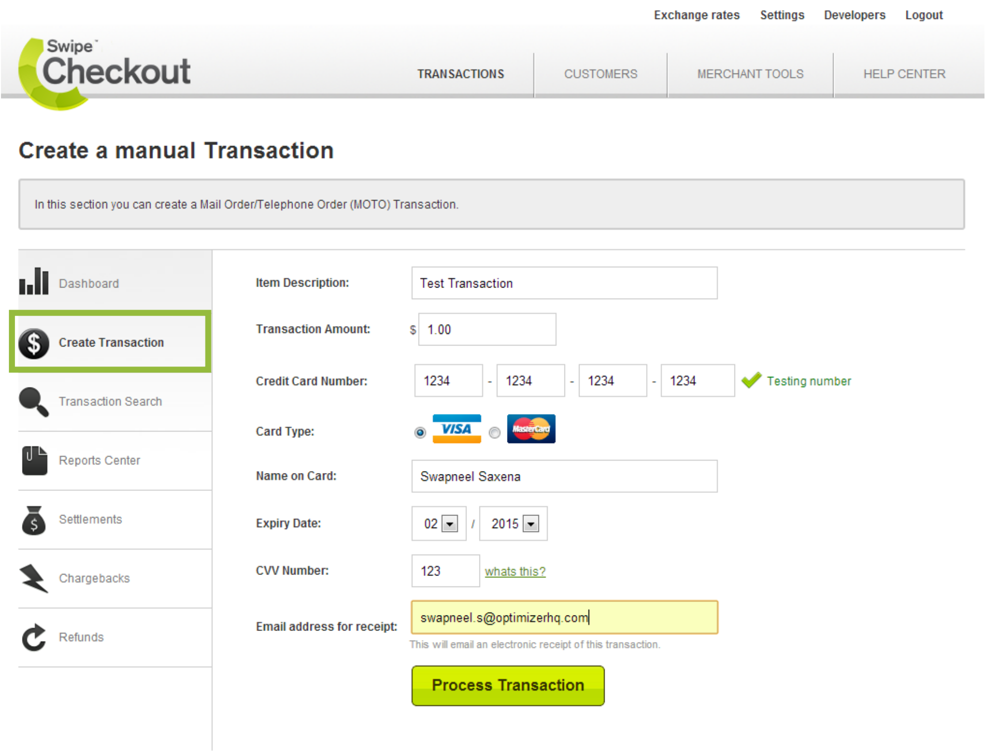
Viewing transactions

To view and create your transactions, navigate to the **Transactions** tab. The **Dashboard** lists current transactions for the day. To view past transactions or export transaction records click **Reports Centre**.



Creating a manual transaction

Click **Create Transaction**.



Complete the required fields:

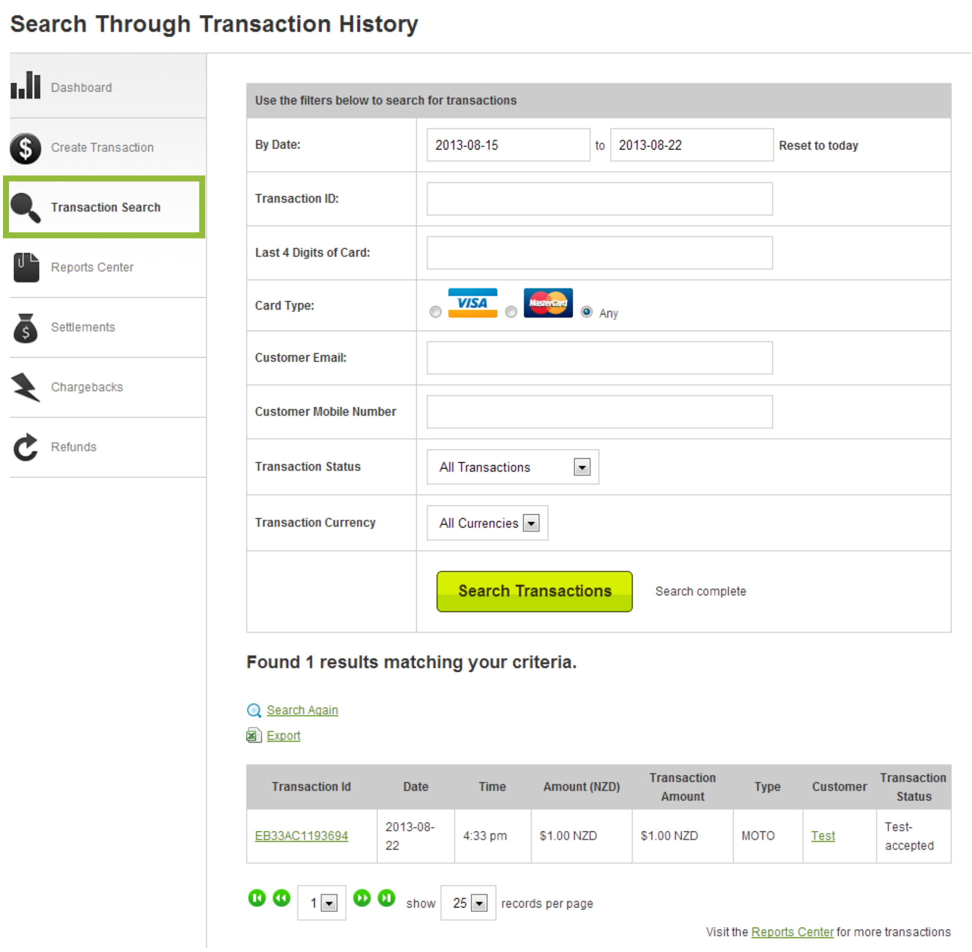
- **Item Description**
- **Transaction Amount** (No less than $1)
- **Credit Card Number** (Valid or Test)
- **Card Type** (Visa or Master Card)
- **Name on Card** (Same as on Credit Card)
- **Expiry Date** (Same as on Credit Card)
- **CVV Number** (Back side of Credit Card)
- **Email Address** (To receive transaction receipt)

Click **Process Transaction** to complete the manual transaction.

Finding transactions

To view a particular transaction click **Transaction Search**. There are three types of searchable transaction methods:

- Manual (Merchant Web App)
- Manual (Android / iOS device)
- Payment Gateway (Website Hosted Payment)

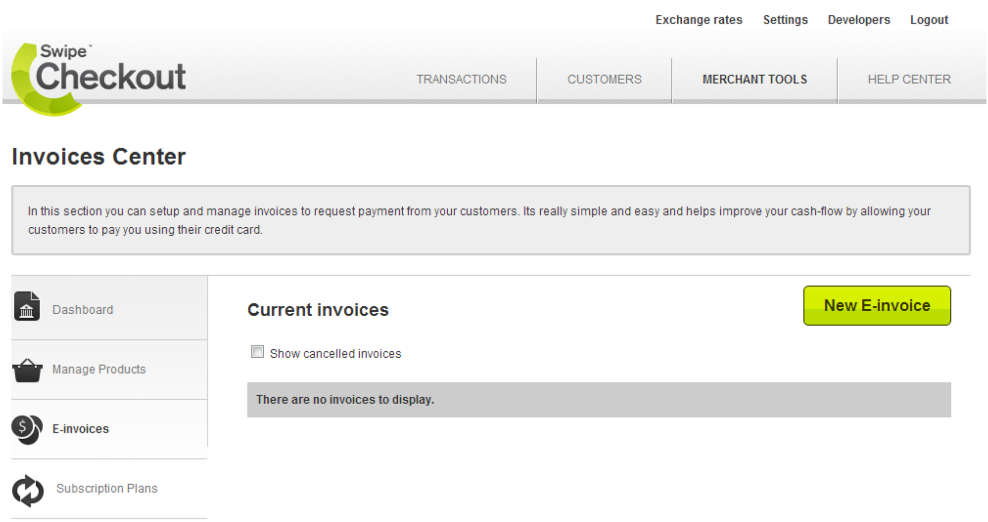


You can filter search results by the following:

- Date
- Transaction ID
- Last 4 digits of CC
- Card Type
- Customer Email
- Customer Mobile Number
- Transaction Status (All, Accepted, Declined or Pending)

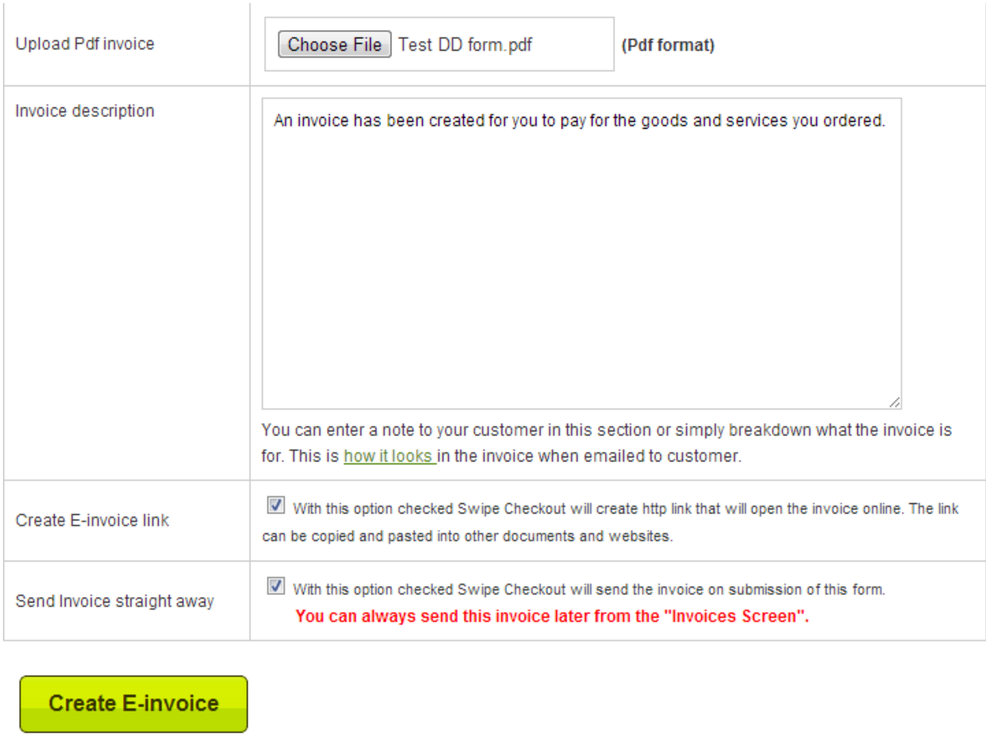
Creating and Viewing Invoices

To set up and manage your invoices navigate to the **Merchant Tools** tab, click **E-invoices.** To create a new invoice click **New E-invoice**.

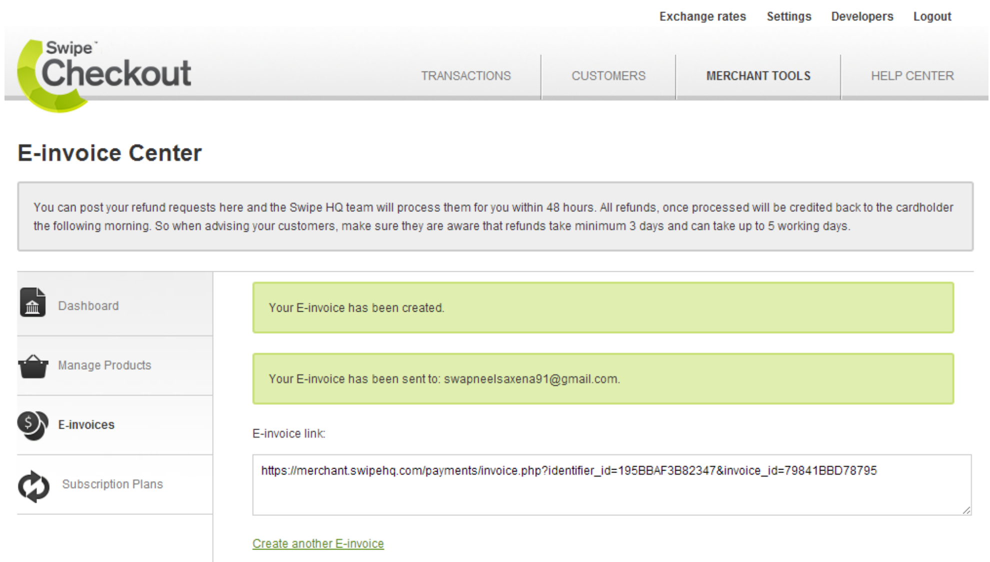


Please note: Swipe creates a payment gateway for the customer to pay. Swipe does not create the invoice. You must first upload a pre-defined invoice in PDF format to create an E-Invoice with Swipe.

Invoice details	
First Name	John
Last Name	Smith
Client Email Address	john.smith@gmail.com
Phone	0212342354
Company	John & Smith Ltd
Address	12 merchant Avenue, Lincoln Road, Auckland - 1234 New Zealand
Invoice reference	234534
Total Amount	$ 450.00
Invoice Due Date	2013-08-24



Once your invoice is created the E-invoice is sent to the customer's email address.



The invoice will look like this. Customers can then click the links to download and pay the invoice.

Swipe™

Date:24/08/13

New Invoice Request from Swapneel Saxena

Swapneel Saxena has sent you a new payment request with an invoice for payment via credit card. Please follow the instructions in this email to complete the transaction.

Payment Request to:

John Smith
John & Smith Ltd
12 merchant Avenue, Lincoln Road, Auckland - 1234 New Zealand
swapneelsaxena91@gmail.com
0212342354

Payment Request From:

Swapneel Saxena
Swipe Testing
L12, 49 Symonds Street
swapneelsaxena91@gmail.com
09 368 5017

An invoice has been created for you to pay for the goods and services you ordered.

Invoice Amount:

450.00

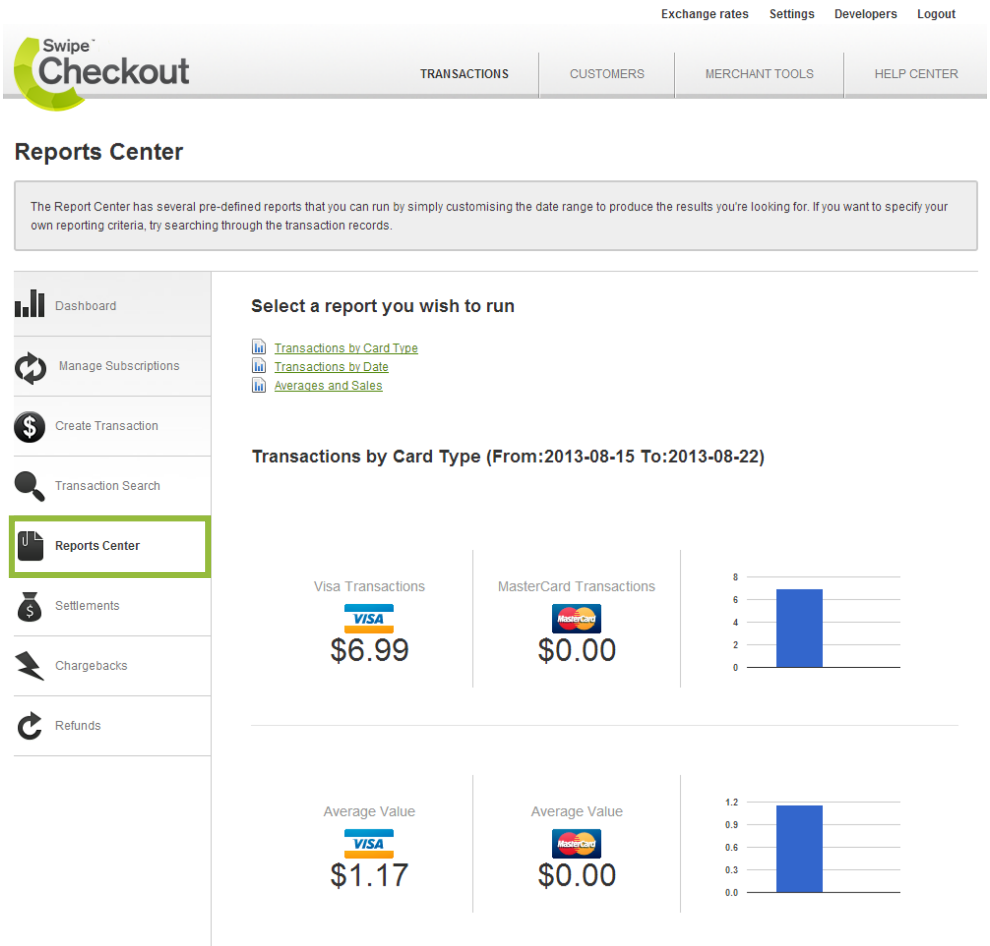
Download Invoice

Make Payment Online

Learn more about Swipe HQ

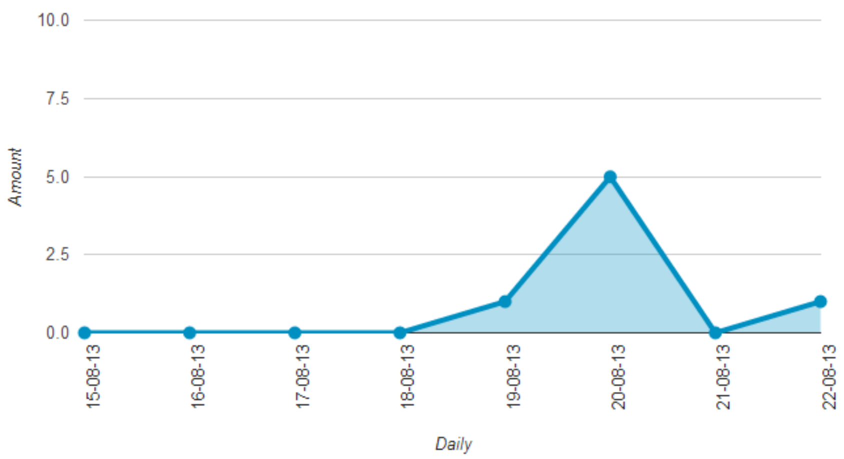
Viewing Reports

Navigate to the **Transactions** tab and click **Reports Centre** and select the type of report you would like to run. To specify your own search criteria use **Transaction Search**. To search by card type click **Transactions by Card Type**. Select the date range and click **Run this Report**.



To search by date click **Transactions by Date** then select the date range, click **Run this Report**.

Transactions by Date group by: Daily (From:15-08-2013 To:22-08-2013)



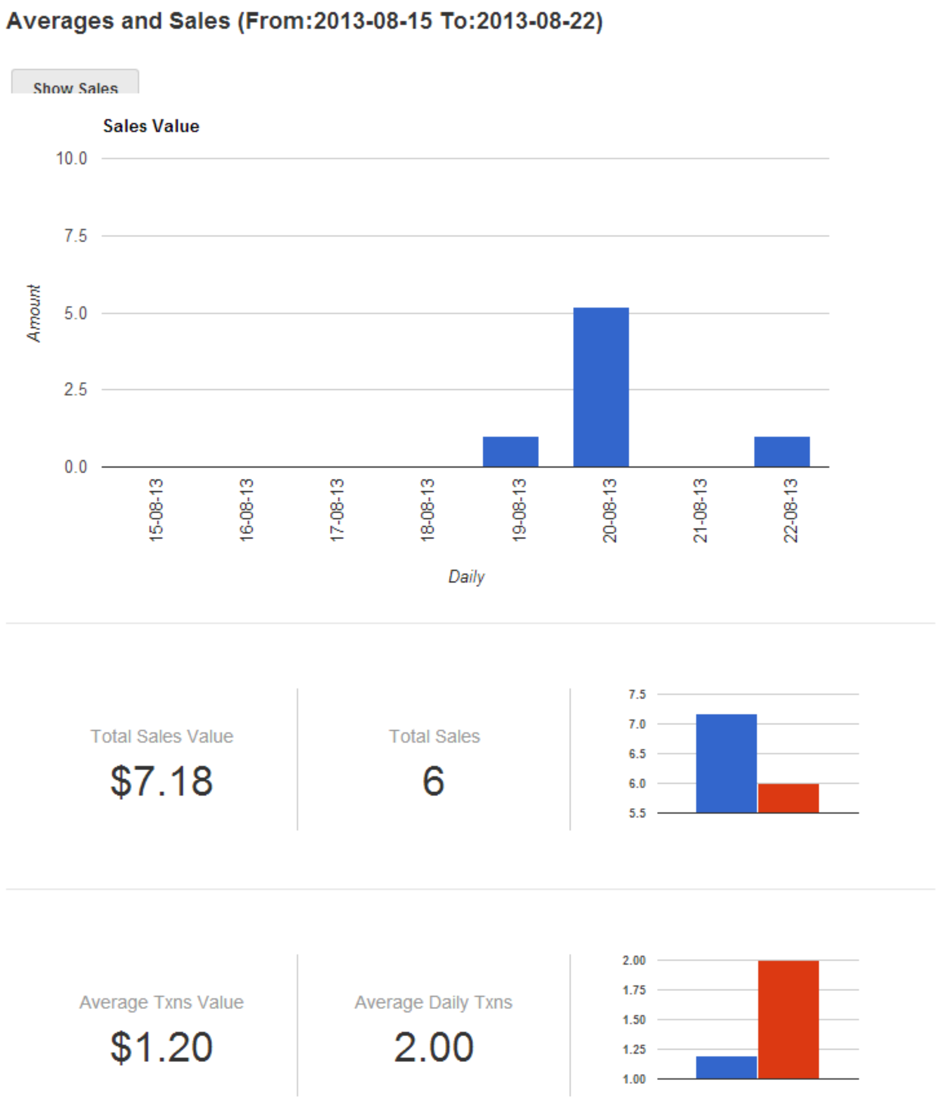
1 show 25 records per page

Export

Total: $6.99

Transaction ref	Date	Value	Type	Card Holder	Email	Status
798375AB43E42	19/08/2013	$1.00	card			accepted
EB3355D263D8C	20/08/2013	$1.00	card			accepted
B25B7ED80DB0C	20/08/2013	$1.99	card			accepted
EB33695A7F089	20/08/2013	$1.00	card			accepted
1240B53BDEDB82	20/08/2013	$1.00	card			accepted
195BB68D596A39	22/08/2013	$1.00	card			accepted

To run a sales report for a specified time period click **Averages and Sales** and select the date range, then click **Run this Report**.



This report shows you:

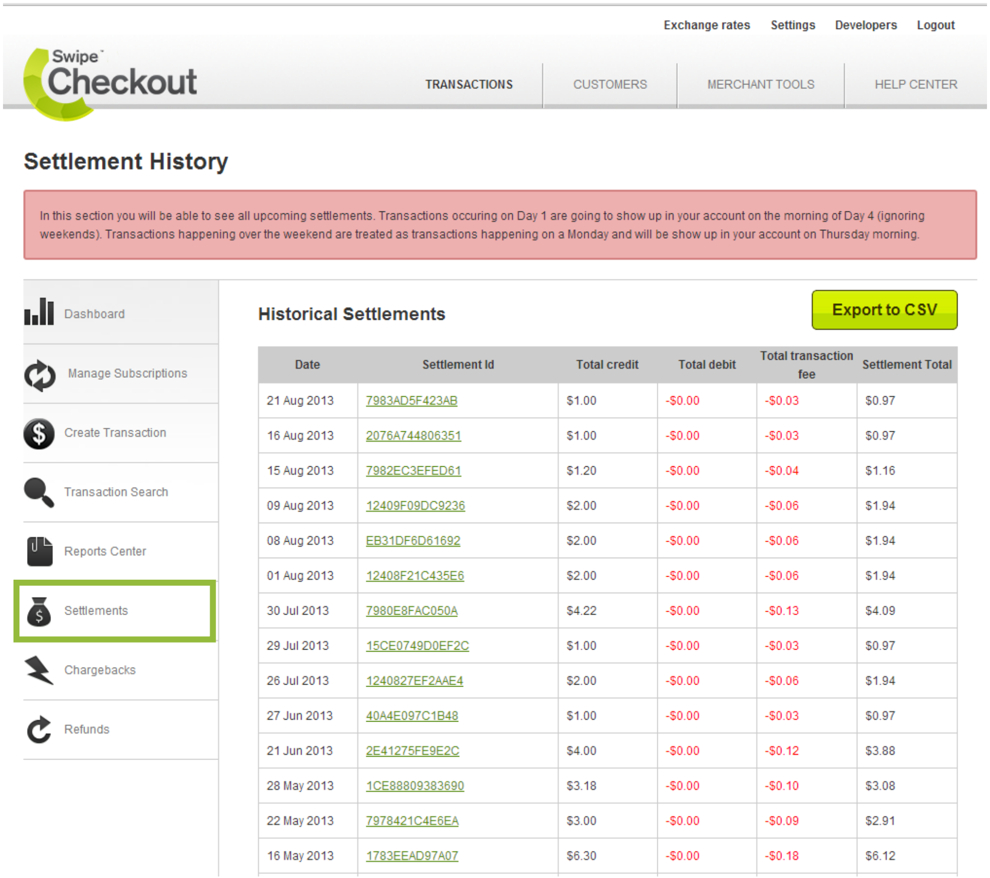
- Total sales and sale value
- Average transactions value

Settling Transactions

To view your upcoming settlements navigate to **Transactions** and click **Settlements**. Transactions occurring on day1 will show up in your merchant account on day 4. If the transaction occurred over the weekend, these transactions are treated as if they occurred on a Monday and will show up in your merchant account on Thursday.

Settlements of funds into your bank account

Settlements are processed within 2 working days unless a transaction is under investigation, is being audited or verified. For all transactions that take place between 6pm & midnight (NZST), funds will take up to 3 working days to appear in your account (so on the morning of the fourth working day).

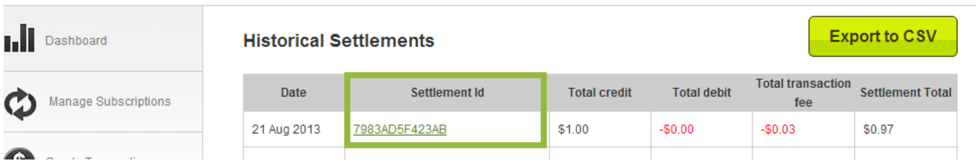


Date	Settlement Id	Total credit	Total debit	Total transaction fee	Settlement Total
21 Aug 2013	7983AD5F423AB	$1.00	-$0.00	-$0.03	$0.97
16 Aug 2013	2076A744806351	$1.00	-$0.00	-$0.03	$0.97
15 Aug 2013	7982EC3EFED61	$1.20	-$0.00	-$0.04	$1.16
09 Aug 2013	12409F09DC9236	$2.00	-$0.00	-$0.06	$1.94
08 Aug 2013	EB31DF6D61692	$2.00	-$0.00	-$0.06	$1.94
01 Aug 2013	12408F21C435E6	$2.00	-$0.00	-$0.06	$1.94
30 Jul 2013	7980E8FAC050A	$4.22	-$0.00	-$0.13	$4.09
29 Jul 2013	15CE0749D0EF2C	$1.00	-$0.00	-$0.03	$0.97
26 Jul 2013	1240827EF2AAE4	$2.00	-$0.00	-$0.06	$1.94
27 Jun 2013	40A4E097C1B48	$1.00	-$0.00	-$0.03	$0.97
21 Jun 2013	2E41275FE9E2C	$4.00	-$0.00	-$0.12	$3.88
28 May 2013	1CE88809383690	$3.18	-$0.00	-$0.10	$3.08
22 May 2013	7978421C4E6EA	$3.00	-$0.00	-$0.09	$2.91
16 May 2013	1783EEAD97A07	$6.30	-$0.00	-$0.18	$6.12

You can export your reports of your settlement history by clicking **Export to CSV**.

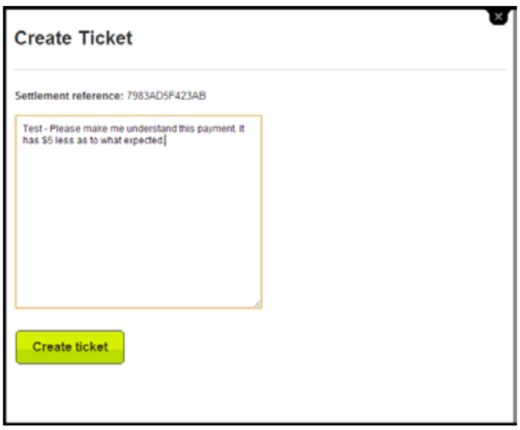
Creating settlement tickets

If you have any queries regarding transaction settlements you can create a settlement ticket within your merchant account. Click the **Settlement ID** link you want to query.

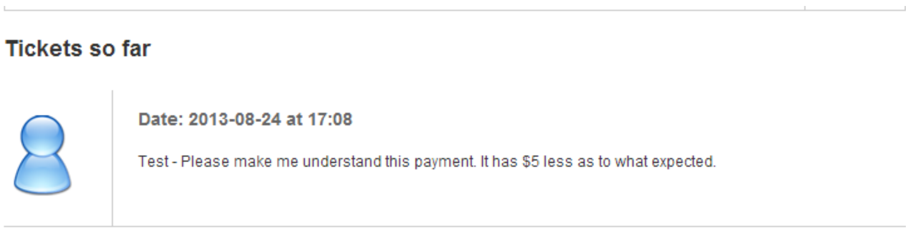


Click **Raise a Ticket**

Enter any notes relating to the settlement and click **Create Ticket**.

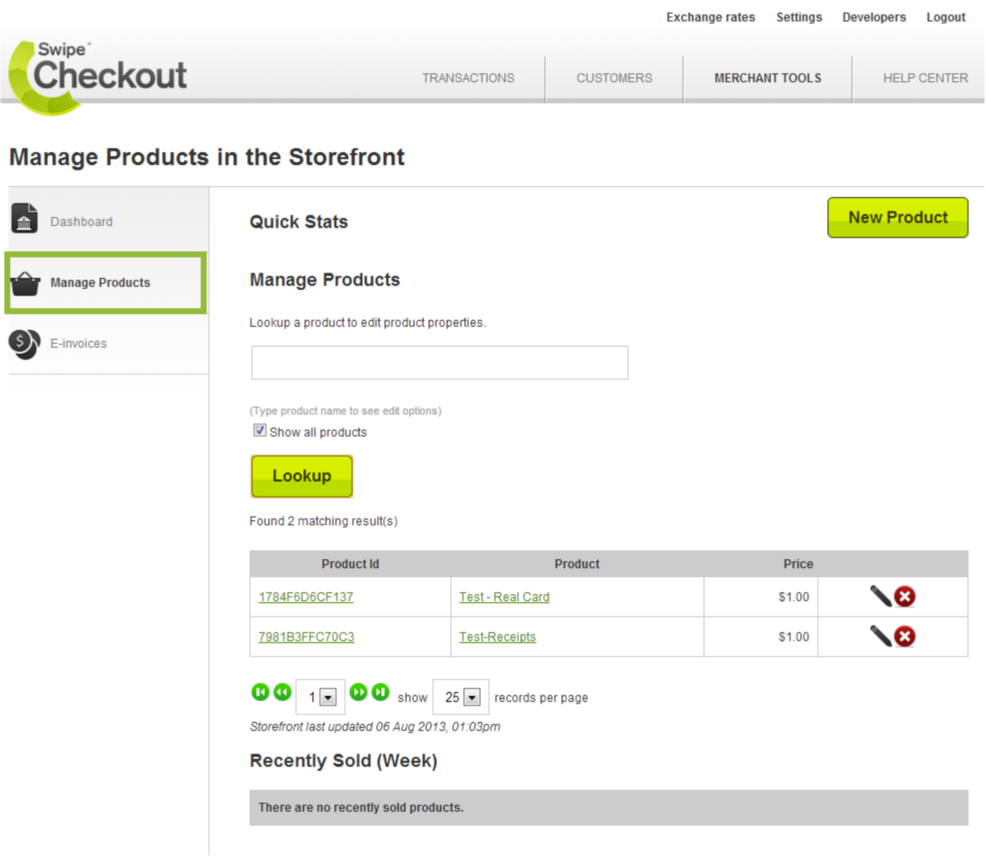


Great! You have now created a response ticket. This response ticket is displayed below the corresponding **Settlement ID** and an email has been sent to the Swipe Investigation Team for investigation.



Managing Your Products

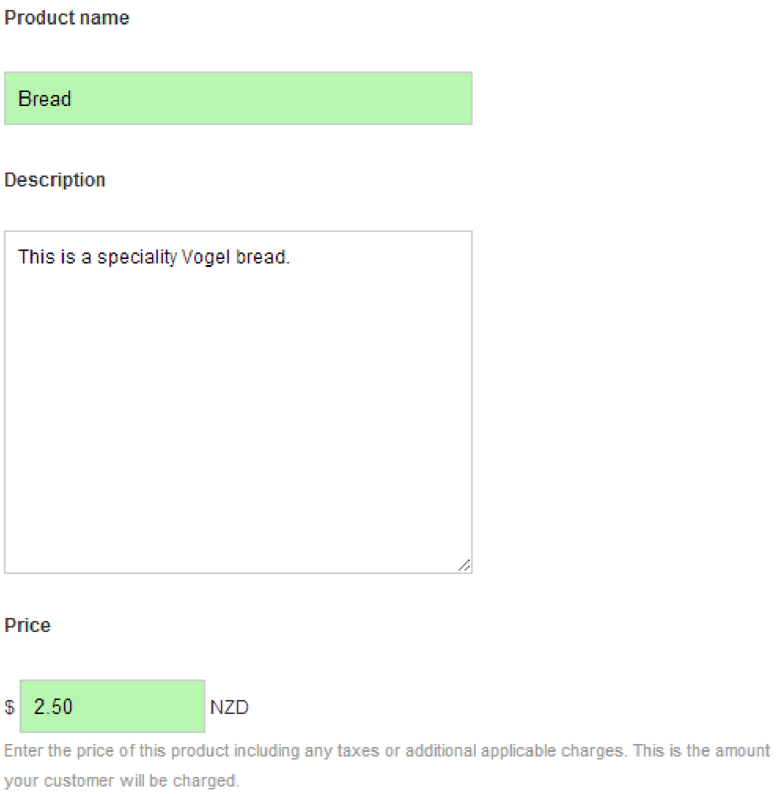
Navigate to the **Merchant Tools** tab and click **Manage Products** from the side menu. In this section you can create and manage your products.

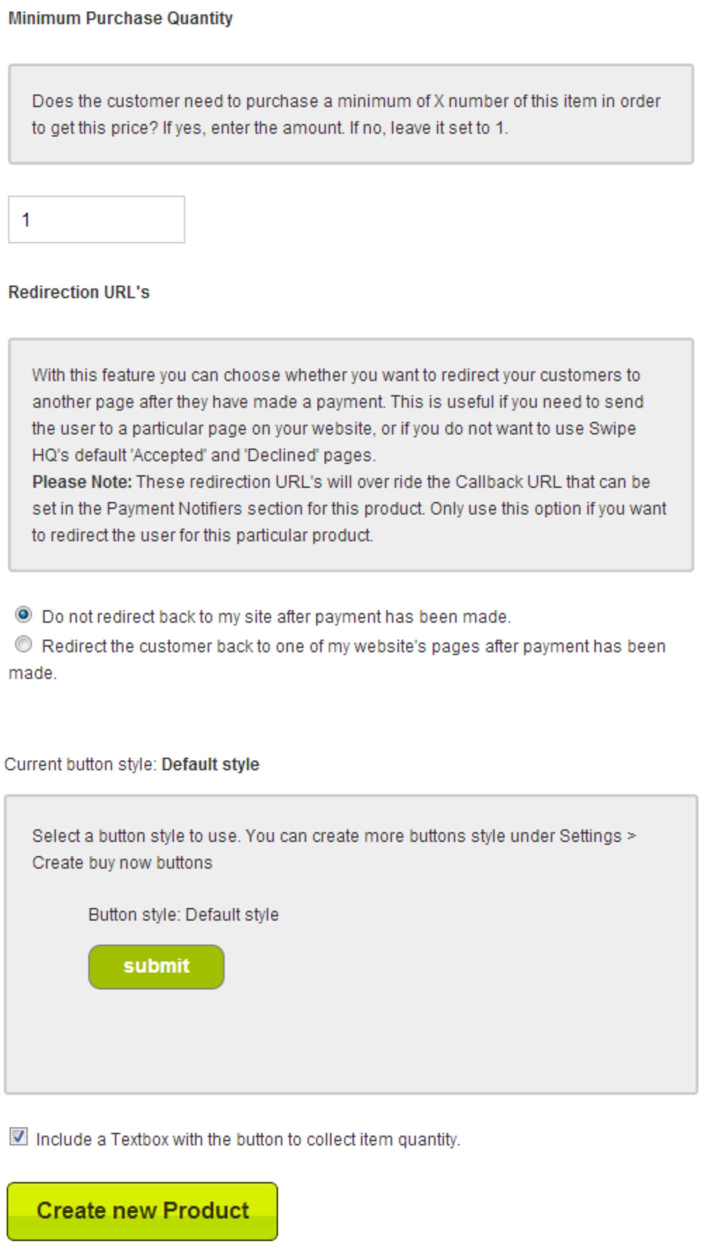


Creating a new product

To create a new product, click **New Product**.

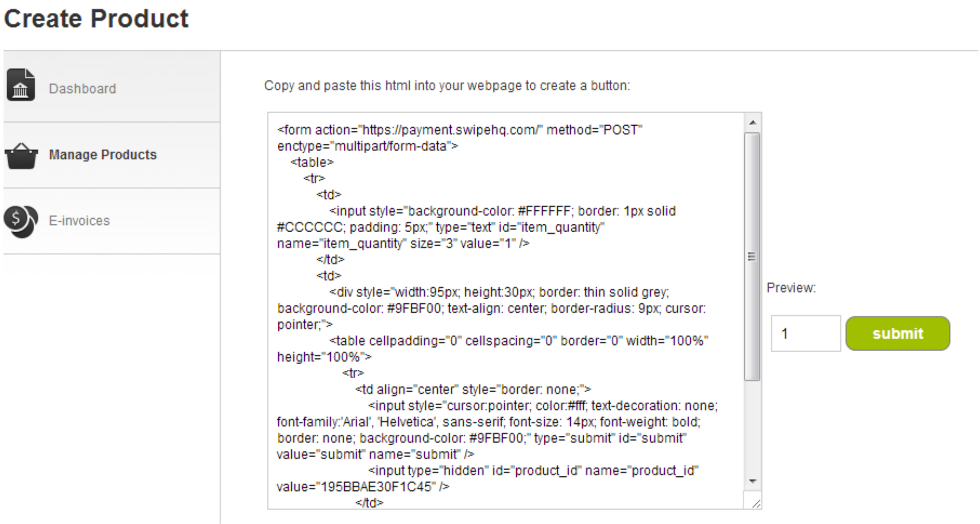
Complete the required fields.



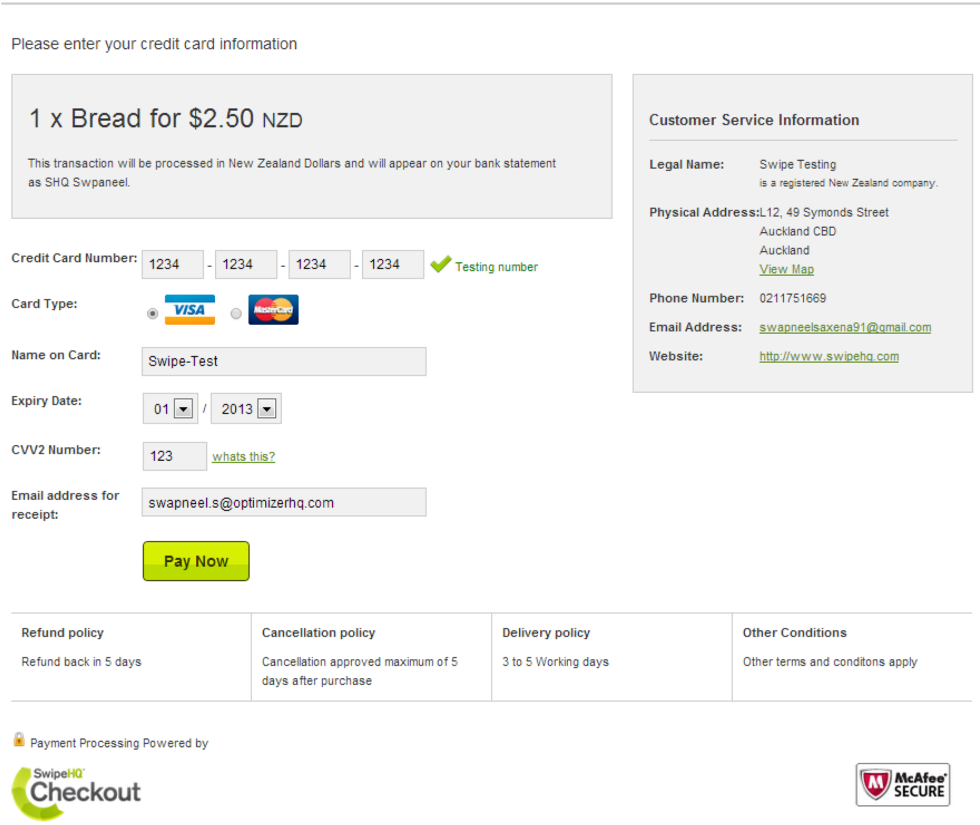


Click **Create new Product**.

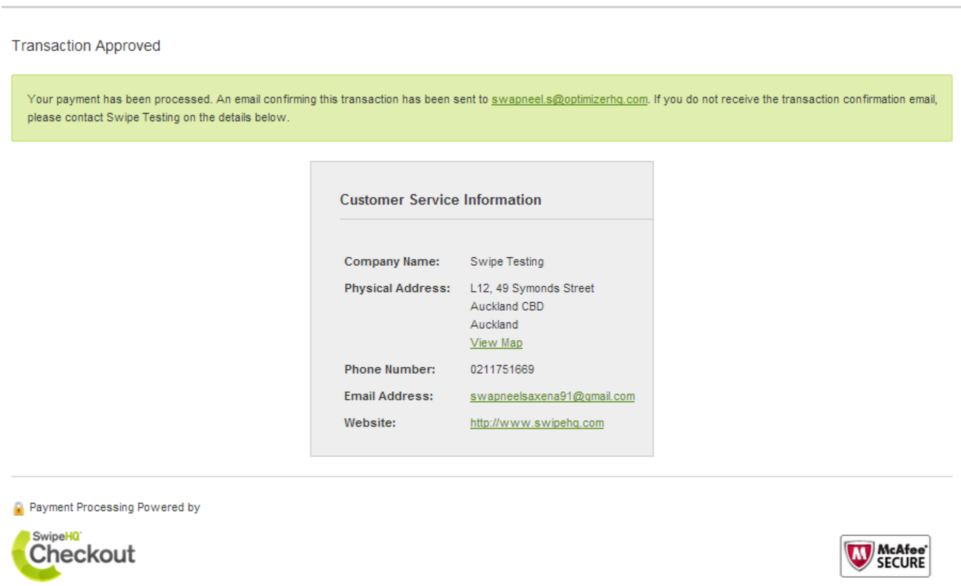
Paste the generated HTML code into your website to create a image based button.



Your payment page will look like this.



Your transaction approval page will look like this.


Transaction Approved

Your payment has been processed. An email confirming this transaction has been sent to swapneel.s@optimizerhq.com. If you do not receive the transaction confirmation email, please contact Swipe Testing on the details below.

Customer Service Information

Company Name:	Swipe Testing
Physical Address:	L12, 49 Symonds Street Auckland CBD Auckland View Map
Phone Number:	0211751669
Email Address:	swapneelsaxena91@gmail.com
Website:	http://www.swipehq.com

Payment Processing Powered by

SwipeHQ Checkout

McAfee SECURE

This is our test account. Your customers will receive a receipt like this below.

This receipt is for test transaction: **EB33EF7B35F27**, from the Swipe HQ Checkout system.

Receipt from Swipe Testing

Swipe Testing has sent you a receipt for a payment made via credit card.

Order details:

Item	Quantity	Unit Price
Bread	1	$2.50

GST:	345345345
Company Name:	Swipe Testing
Physical Address:	L12, 49 Symonds Street
Phone Number:	0211751669
Email Address:	swapneelsaxena91@gmail.com

Total Amount Paid:

$2.50

This transaction will appear on your credit card statement as SHQ Swpaneel

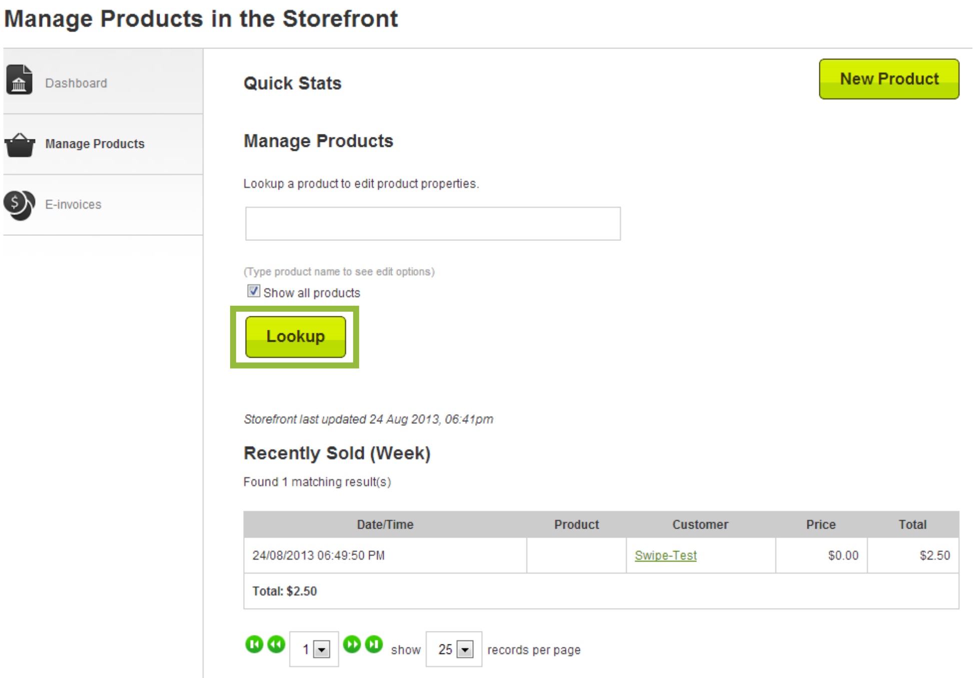
Learn more about Swipe HQ

Powered by Optimizer HQ

****PLEASE DO NOT REPLY DIRECTLY TO THIS EMAIL.
If you reply to this email you will not receive a response.****

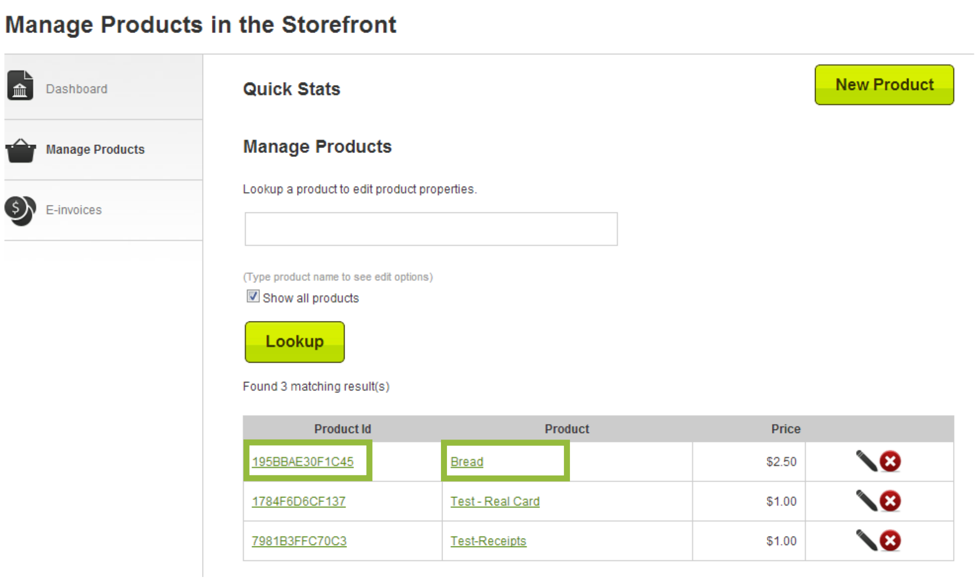
Managing your products

You can search for products using the **Lookup** button.



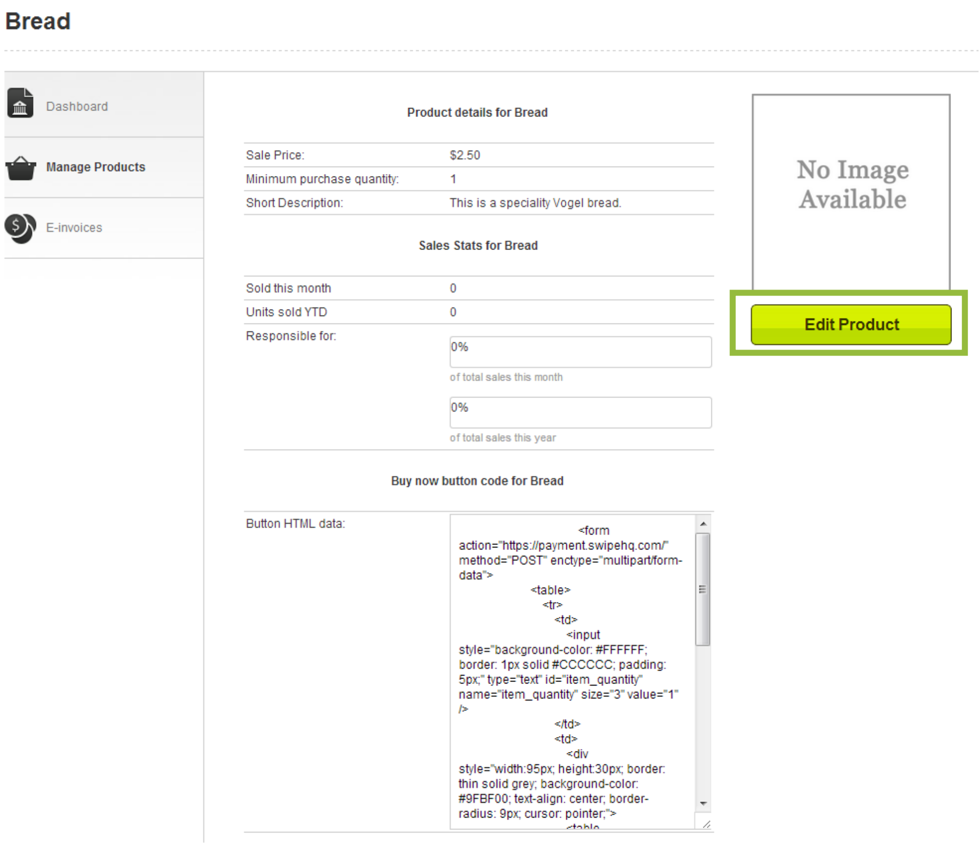
Viewing and editing product details

To view a product report click on the **Product ID** or **Product Name**.



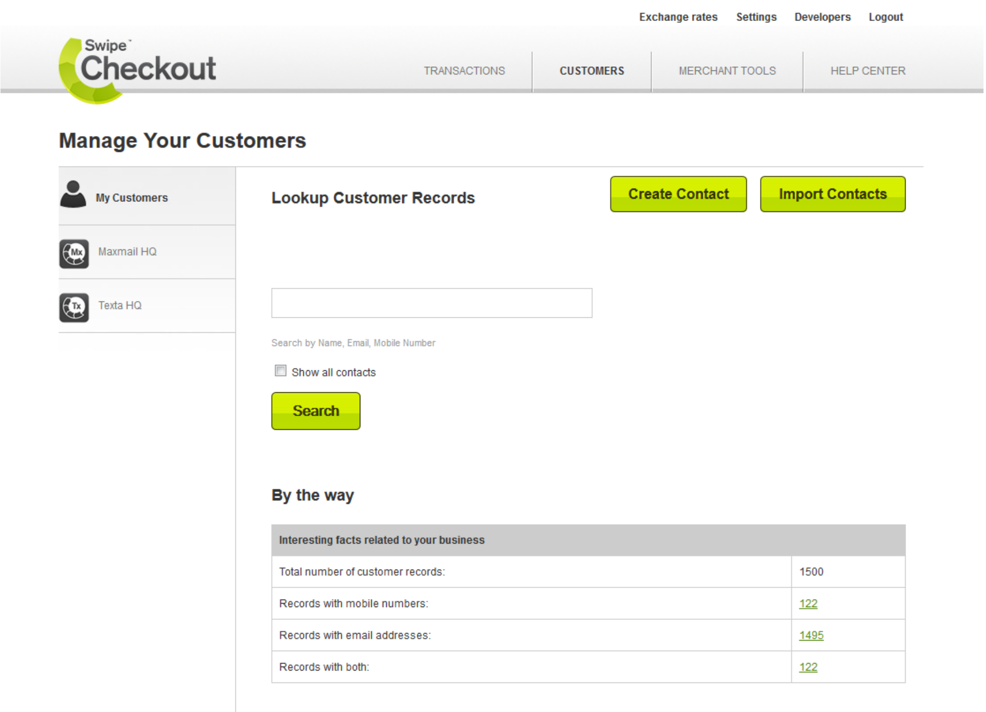
Quickly edit product information by clicking the pencil or delete products by clicking the cross.

Your product report will look like this. To edit product information click **Edit Product**.



Managing Your Customers

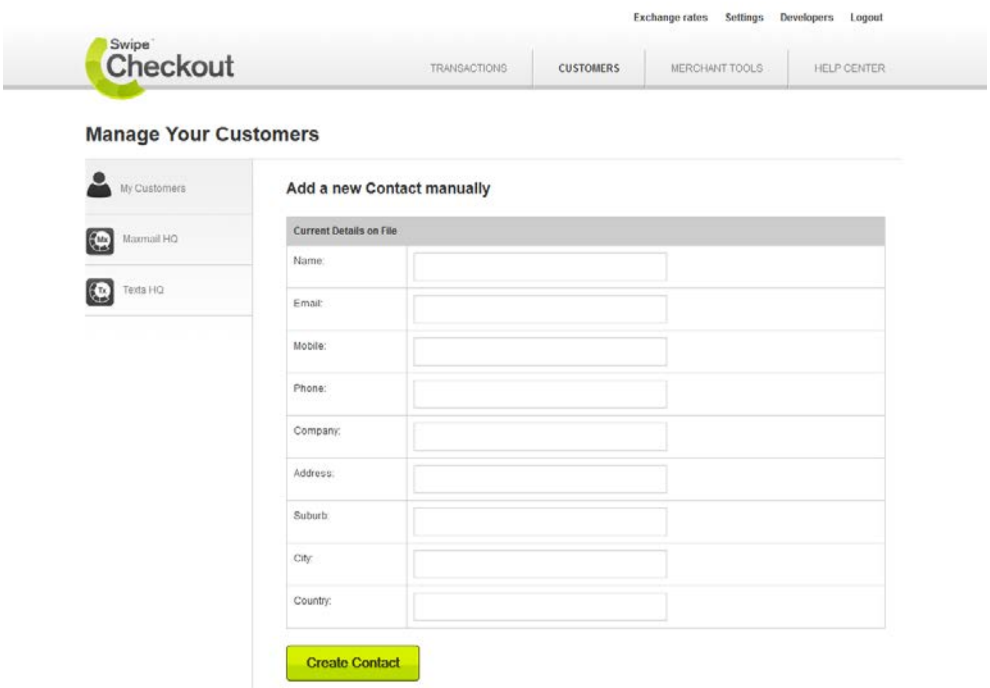
To manage your customers navigate to the **Customers** tab.



From this page you can:

- View facts related to your customer database
- Lookup customer records
- Manually add new customers to your database
- Import customers to your database

To manually add a new customer click **Create Contact**



To bulk import customers click **Import Contacts**. Select a CSV file to upload and click **Upload File.**