

Entering Transactions

Online Entry

Online Entry allows the user to swipe or manually enter a transaction that is immediately sent to the processor for electronic authorization. Depending on account setup, a card number, TrueToken[®], or 4Word[®] may be used to enter the transaction. To enter a transaction, complete the following steps:



Note: If there is only one merchant assigned to your user account, start at step 4 because your merchant is automatically selected. In addition, if you are currently auditing a batch to be closed and have selected a business date, then any transactions you enter will appear in that batch with the same business date.

1. From the menu, select **Transactions > Select Merchant**.
2. Select the merchant the transaction is for.
3. Click **Submit**.
4. From the menu, select **Transactions > Online Entry**.
5. On the **Online Entry** page, complete the fields (required fields are notated in **bold** text).



Requirement: If the transaction is an authorization only, select **Auth Only**. If the transaction is a sale, verify that **Auth Only** is not selected.

6. Click **Submit**.
7. *(If applicable)* If a voice referral is required, on the Voice Referral page, follow the instructions to obtain an authorization code from the voice authorization center. Once received, enter the code into the Approval Code field, and click **Approve**. If the voice center declines the transaction, click **Delete/Void** to void the transaction.
8. *(Optional)* If a printed record of the transaction is needed, select **Print** from the side menu.



Note: Draft Printing must be enabled for your user profile, and the Shift4 Draft Printer program must be downloaded and installed. If needed, the *Draft Printer Installation Guide* contains additional information and is available on Shift4.com.

Offline Entry

Offline Entry allows the user to swipe or manually enter a transaction for which an authorization code has already been obtained. To enter a transaction, with a Merchant selected, complete the following steps:

1. From the menu, select **Transactions > Offline Entry**.
2. On the Offline Entry page, complete the fields (required fields are notated in **bold** text).
3. Click **Submit**.
4. *(Optional)* If a printed record of the transaction is needed, select **Print** from the side menu.



Tip: You can quickly edit or void an unsettled transaction by entering the Invoice number in the Invoice field and clicking the **Recall** button.
