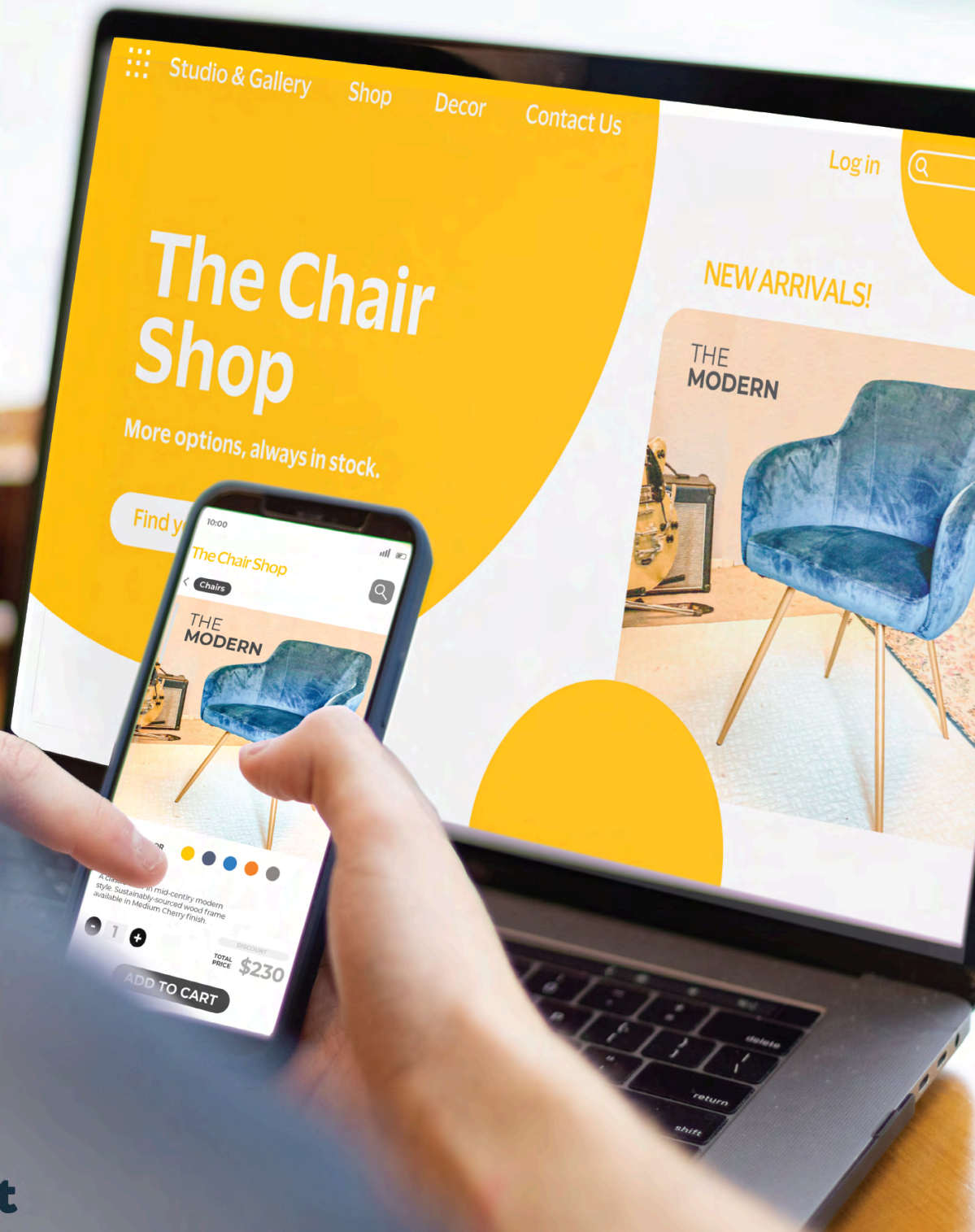


Authorize.net 2.0 App for Windows Guide



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Authorize.net 2.0 App for Windows Guide

This section describes how to use this guide and where to find additional information.

Audience and Purpose

This guide is for merchants who use the Authorize.net 2.0 App for Windows. It explains the features and basic tasks.

Conventions

This statement appears in this document:



Important: An *Important* statement contains information essential to successfully completing a task or learning a concept.

Customer Support

For support information about any service, visit the Authorize.net Support Center:

<http://support.authorize.net>

Recent Revisions to This Document

25.6.1

Initial release.






Payments

Use the Payment feature to accept payments with payment cards.

Accepting a Payment Using a Card Reader

If a card reader is connected to your computer, the app uses the card reader by default.

Follow these steps to accept a payment using a card reader:




1. Click **Accept Payment**.
2. Choose a transaction type:
 - **Authorize and capture**: Automatically capture the transaction for settlement. This option is selected by default.
 - **Authorize only**: Authorize the transaction, but do not capture the transaction automatically. Authorize-only transactions must be captured manually to settle.
 - **Capture only**: Submit a transaction with either a transaction ID from an Authorize Only transaction or an authorization code that you obtained from the card issuer. Capture-only transactions from authorizations obtained from the card issuer can result in higher discount rates charged by merchant service providers.
3. Click the amount field and enter an amount.
4. Enter a description in the **Description** field.
5. Click  and  to adjust the quantity.
6. Enter the tax amount.
7. Click **Add to cart**.
8. Repeat Steps 1-7 for each item.
9. Click . The Review Order screen appears.
10. Review the order:
 - a. Click  and  to adjust the quantity for each item.
 - b. To delete the item, lower the quantity to 1 and then click the red trash can icon.
 - c. To add more items, click **Add items**.

11. Click **Take payment**.
12. **Optional:** Choose a tip amount. For details on enabling tips, see [Enabling Tips \(on page 12\)](#)
For a custom tip amount, click **Custom tip amount**, enter the custom amount, and click **Submit**.
13. Either insert the card chip first into the card reader, or swipe the card, as prompted.
14. When the transaction is improved, click **Ok**.
15. Select a receipt method. Options include email, print, or no receipt.
16. For email receipts, enter the email address and click **Submit**.
17. Click **Done**.



The payment is accepted.

Accepting a Payment Manually

Follow these steps to accept a payment manually if you do not have a card reader attached to your computer:

1. Click **Accept Payment**.
2. Choose a transaction type:
 - **Authorize and capture:** Automatically capture the transaction for settlement. This option is selected by default.
 - **Authorize only:** Authorize the transaction, but do not capture the transaction automatically. Authorize-only transactions must be captured manually to settle.
 - **Capture only:** Submit a transaction with an authorization code that you obtained from the card issuer. Capture-only transactions can result in higher discount rates charged by merchant service providers.
3. Click the amount field and enter an amount.
4. Enter a description in the **Description** field.
5. Click  and  to adjust the quantity.
6. Click **Add to cart**.
7. Repeat Steps 1-6 for each item.
8. Click  . The Review Order screen appears.

9. Review the order:

- a. Click  and  to adjust the quantity for each item.
- b. To delete the item, lower the quantity to 1, and then click the red trash can icon.
- c. To add more items, Click **Add items**.

10. Click **Take payment**.

11. Choose a tip amount.

For a custom tip amount, click **Custom tip amount**, enter the custom amount, and click **Submit**.

12. Enter the card number, expiration date, and the billing ZIP code.

13. Click **Take payment**.

14. Choose a receipt method. Options include email, print, or no receipt.

15. For email receipts, enter the email address and click **Submit**.

16. Click **Done**.

The payment is accepted.

Payment Methods

The following payment methods are supported by the Authorize.net 2.0 app:

Credit/debit card

You use a card reader connected by USB. This option is the default if you have a card reader connected to the app. For details on adding a card reader, see [Adding and Viewing Your Card Reader \(on page 12\)](#).

Manual card entry


You manually enter the card number, expiration date, and ZIP code for the cardholder. This option is the default if you do not have a card reader connected.

Transactions

Use the Transactions feature to view transactions accepted on the app. You can also void or refund transactions.

Viewing and Managing Transactions

Follow these steps to view and manage your transactions:

1. Click **Transactions**.
2. **Optional:** Search by transaction ID.
3. **Optional:** Click  to set filters.

Filters include:

- Sort by newest to oldest or oldest to newest
- Transaction method: all, card, or cash
- Date range: today, yesterday, last 7 days, last 15 days, or last 30 days
- Transaction status: all, declined, void, refund, or settled successfully


Click **Apply filters** to apply the filters you selected, or Click **Clear all** to reset all filters.


4. **Optional:** Set the date range: today, yesterday, last 7 days, last 15 days, or last 30 days.
5. Scroll to find the transaction that you want.
6. Click the transaction.

The following transaction details appear:

- The date and time of the transaction
- The amount of the transaction
- The transaction's recent activity, with dates and times for each action
- The transaction ID
- The transaction status

- The transaction authorization code
- The transaction type
- The transaction method

7. To email a receipt, click  , enter an email address, and click **Submit**.
A receipt is sent to the email address entered.

8. To print a receipt, click  .
If a printer is connected, the receipt is printed. If a printer is not connected, you are prompted to connect the printer.

9. To capture authorize-only transactions, click **Capture**.
The transaction is captured for settlement.

10. To void unsettled transactions, click **Void**.
The transaction is voided and cannot be settled.

11. To refund settled transactions, click **Refund**.
The transaction is refunded, and the customer receives the funds after settlement.


Settings

Use the Settings feature to complete these tasks:

- Update your user account profile.
- Set up biometrics.
- Set up default sales tax, tipping, and receipt printers.

Updating Your User Profile

Follow these steps to update your user profile:

1. Choose **Settings > My Profile**.
2. Click **Edit**.
The Edit Profile screen appears.
3. Update the name, address, city, state, ZIP code, phone number, and email address for your user profile. If you leave a field blank, an error message appears.
4. Click **Save** to save your changes, or tap  to cancel.



Important: Changes that you make to your user profile in the app do not change your user account in the Merchant Interface.

Setting Up Account Security

Follow these steps to set up biometrics:

1. Choose **Settings > Account security**.
2. Toggle the biometrics option.
You are logged out of the app.
3. Log back in to the app using your username and password.
4. When prompted, use the device's biometric option, such as your Windows PIN.

You can now use biometrics to log in to your app.

Adding and Viewing Your Card Reader

Follow these steps to add or view your card reader:

1. Plug your card reader into a USB port if it is not already plugged in.
2. In the app, choose **Settings > Payment acceptance**.
If your card reader is already connected, the details of your card reader appear. If no card reader appears, continue to the next step.
3. Tap **Connect card reader**.



Important: If you do not have a USB card reader, tap **Purchase Card Reader**. A web page appears where you can buy a compatible USB card reader. To see compatible USB card readers, see <https://partner.posportal.com/authorizenet/auth/authorize-net-bbpos-awc-walker-c3x-bluetooth-card-reader.html>

4. Tap **Done**.

The card reader is connected to the app.

Setting a Default Sales Tax

Follow these steps to set a default sales tax:

1. Choose **Settings > Transaction settings**.
2. Enter the percentage of sales tax in the **Default sales tax** field.

The default sales tax is set.

Enabling Tips

Follow these steps to enable tipping:

1. Choose **Settings > Transaction settings**.
2. Tap the **Allow tipping** switch.
3. Enter the percentages of default tipping values in the **Default tipping percentages** fields.

Tipping is enabled.

Allowing Tips

Follow these steps to allow tips and to specify default tip percentages:


1. Choose **Settings > Transaction settings**.
2. Toggle **Allow tipping**.
3. Enter amounts in the **Default tipping percentages** fields.

Tips are enabled during checkout.

Adding a Receipt Printer

To purchase a supported receipt printer, visit <https://partner.posportal.com/authorizenet/auth/printers.html>.

Follow these steps to add a receipt printer:

1. If the printer uses USB, plug the printer into a USB port.
2. Power on the printer.
3. Choose **Settings > Receipt printer**.
4. Click **Connect a receipt printer**.
5. Click **USB connection**, **Bluetooth connection**, or **Network connection**, depending on the type of printer you use.
6. Click **Connect**.
7. Click  .
8. To automatically print receipts after checkout, toggle **Auto Print receipts**.

The printer is connected to the app.