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2 How to Search for Orders

How to Search for Orders Orders can be searched using the [Search Order](#) screen

The screenshot shows the 'Search Order' window with the following fields and options:

- Bill To:** Last Name, First Name
- Ship To:** (Empty field)
- Card Type:** All (dropdown)
- Last 4:** (Empty field)
- Order Number:** (Empty field)
- Auth Number:** (Empty field)
- Search Days:** 90 (input)
- Bill To Phone:** (Empty field)
- Reference #:** (Empty field)
- Email:** (Empty field)
- Advance Criteria:**
 - Order Status: All (dropdown)
 - Payment Status: All (dropdown)
 - Order Source: All (dropdown)
 - Operator: All (dropdown)
 - Order Date(s): (Date range selector)
 - Ship Method: All (dropdown)
 - Product: All (dropdown)
 - None (dropdown)
 - Exclude Closed, Canceled and Declined Orders

Buttons: Search, Clear, Cancel

Step 1 From the [Orders](#) menu, select [Order Search](#)

Step 2 [Search Order](#) screen is displayed

This screenshot is identical to the one above, showing the 'Search Order' window with all search criteria fields and the 'Advance Criteria' section.

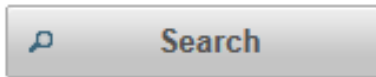
Step 3 Orders may be searched by

- Bill to Name
- Ship to Name
- Card Type -Type of credit card
- Last 4 - [Last 4](#) numbers on credit card
- Order Number
- Search Days
- Reference #
- Email

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- Auth Number
- Bill to Phone (10 digit phone number required)
- Advanced Criteria (at least 1 [Search Order](#) field is required in addition to [Advanced Criteria](#))

Step 4 Click [Search](#) button to search



Step 5 Search results are displayed in the search grid. [Export](#) button is enabled allowing user to export search results

Search Clear Export

Page (1 of 1) 1 15 (Total Records 12)

Order Number	Order Date	Order Status	Payment Status	Product	Certificate Holder	Event Date	Applicant	Ship To	Applicant Phone
13005520	01/01/2013	Open	Unsubmitted	Birth Certificate / City of Arlington	Test Test	03/12/1985	test testing	test testing	(615)-372-7524
13005519	01/01/2013	Open	Overpaid	Birth Certificate / City of Arlington	Test Test	03/12/1985	test testing	test testing	(615)-372-7524
13004992	12/10/2012	Open	Paid in Full	Birth Certificate / City of Arlington	test testing	01/01/1950	test testing	test testing	(555)-111-1111
13004991	12/10/2012	Open	Paid in Full	Birth Certificate / City of Arlington	test testing	01/01/1950	test testing	test testing	(555)-111-1111

Step 6 Click on underlined [Order Number](#) to view order in [Order Details](#) screen

Note Search results can be exported to excel by clicking the [Export](#) button.

Results are displayed in an Excel spreadsheet and can be saved or printed

Order Number	Order Date	Order Stat	Payment Status	Product	Certificate	Event Date	Applicant	Ship To	Applicant Phone
13029310	7/11/2011	Open	Unsubmitted	Registrati				test testing	
13029309	7/11/2011	Open	Unsubmitted	Registrati				test testing	
13029308	7/11/2011	Open	Unsubmitted	Registrati				test testing	
13029307	7/11/2011	Open	Unsubmitted	Registrati				test testing	
13029306	7/11/2011	Open	Unsubmitted	Registrati				test testing	
13023633	7/4/2011	Open	Unsubmitted	Traffic Cit					
13019649	6/14/2011	Open	Paid in Full	Water Bill					
13019644	6/14/2011	Open	Paid in Full	Court Fine					

3 How to Search for Orders Using Advanced Criteria

How to Search for Orders Using Advanced Criteria Order Search

Orders may be searched using [Advanced Search Criteria](#). [Advanced Criteria](#) can only be used when at least one type of other search criteria is entered

Advance Criteria

Order Status All

Payment Status All

Order Source All

Operator All

Order Date(s) [Date Range]

Ship Method All

Product All

None

Exclude Closed, Canceled and Declined Orders

Step 1 Select at least one of the [Advanced Criteria](#) items to search by

Advance Criteria

Order Status All

Payment Status All

Order Source All

Operator All

Order Date(s) [Date Range]

Ship Method All

Product All

None

Exclude Closed, Canceled and Declined Orders

Step 2 Click [Search](#) button

Step 3 Search results are displayed. Click on highlighted **Order Number** to view order in **Order Details** screen

Order Number	Order Status	Payment Status	Product	Certificate Holder	Event Date	Applicant	Ship To	Applicant Phone	
13005520	01/01/2013	Open	Unsubmitted	Birth Certificate / City of Arlington	Test Test	03/12/1985	test testing	test testing	(615)-372-7524
13005519	01/01/2013	Open	Overpaid	Birth Certificate / City of Arlington	Test Test	03/12/1985	test testing	test testing	(615)-372-7524
13004992	12/10/2012	Open	Paid in Full	Birth Certificate / City of Arlington	test testing	01/01/1950	test testing	test testing	(555)-111-1111
13004991	12/10/2012	Open	Paid in Full	Birth Certificate / City of Arlington	test testing	01/01/1950	test testing	test testing	(555)-111-1111

Note Search results can be exported to excel by clicking the **Export** button.

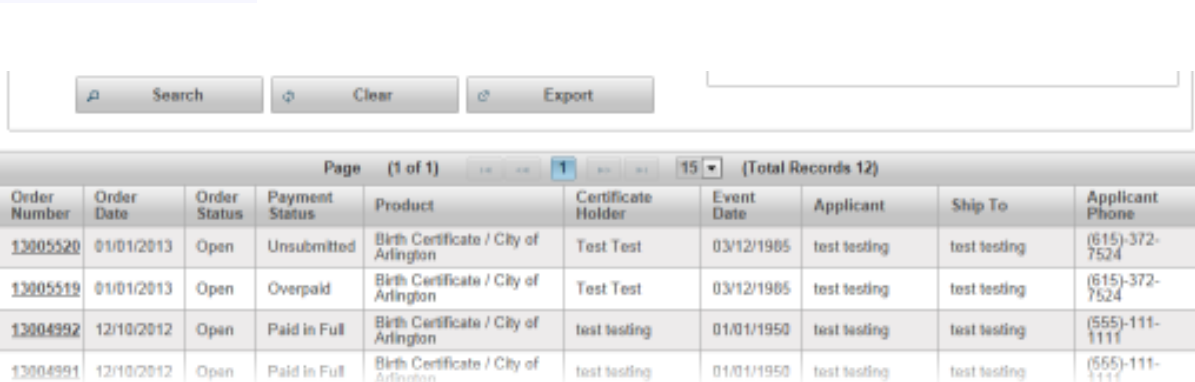
Results are displayed in an Excel spreadsheet and can be saved or printed

Order Number	Order Date	Order Status	Payment Status	Product	Certificate	Event Date	Applicant	Ship To	Applicant Phone
13029310	7/11/2011	Open	Unsubmitted	Registrati				test testing	
13029309	7/11/2011	Open	Unsubmitted	Registrati				test testing	
13029308	7/11/2011	Open	Unsubmitted	Registrati				test testing	
13029307	7/11/2011	Open	Unsubmitted	Registrati				test testing	
13029306	7/11/2011	Open	Unsubmitted	Registrati				test testing	
13023633	7/4/2011	Open	Unsubmitted	Traffic Cit.					
13019649	6/14/2011	Open	Paid in Full	Water Bill					
13019644	6/14/2011	Open	Paid in Full	Court Fine					

4 How to Export Search Results

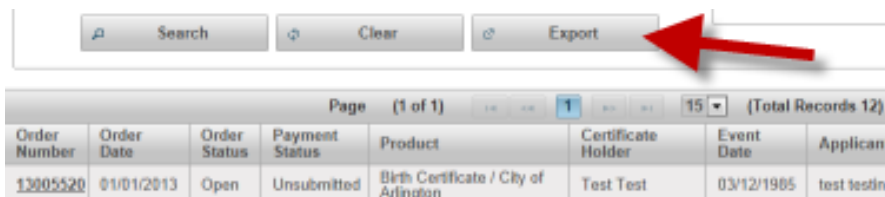
How to Export Search Results

Search results may be exported into an Excel file and/or saved.

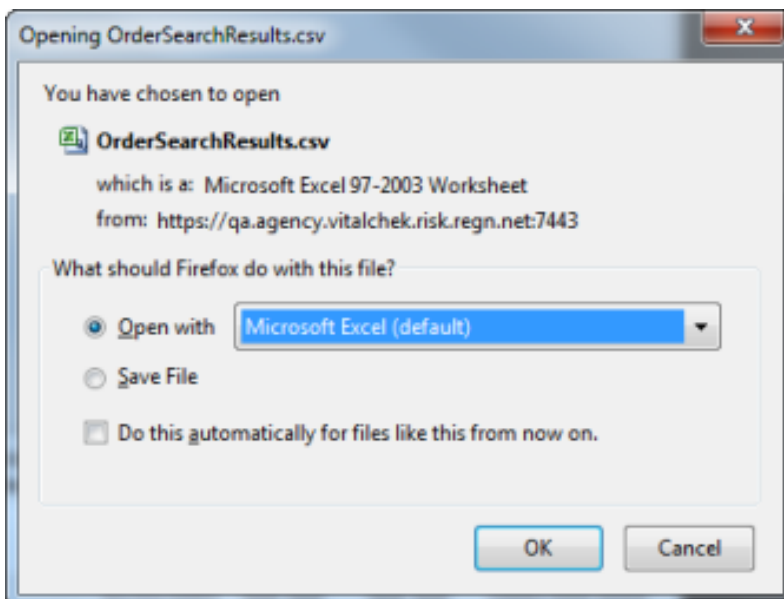


Note: To export search results when using Internet Explorer 9, please review [Accessing VPS \(on-line documentation\)](#)

Step 1 After search results have been displayed, click **Export** button



Step 2 **Order Search Results** box opens

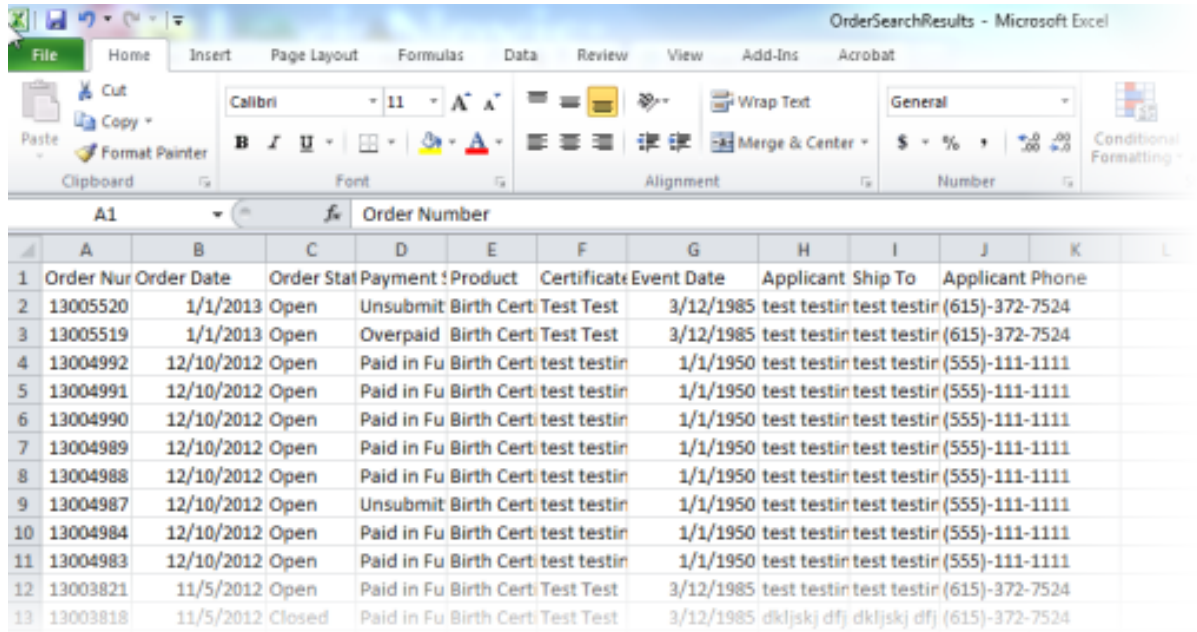


Step 3 Choose **Open with**, **Save File** and/or **Do this automatically** options

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Step 4 Click **OK** to submit selection

Step 5 Order is displayed in Excel (for **Open with** option) or saved (for **Save File** option)



The screenshot shows the Microsoft Excel interface with the following data table:

	A	B	C	D	E	F	G	H	I	J	K	L
1	Order Nur	Order Date	Order Stat	Payment !	Product	Certificate	Event Date	Applicant	Ship To	Applicant	Phone	
2	13005520	1/1/2013	Open	Unsubmit	Birth Cert	Test Test	3/12/1985	test testin	test testin	(615)-372-7524		
3	13005519	1/1/2013	Open	Overpaid	Birth Cert	Test Test	3/12/1985	test testin	test testin	(615)-372-7524		
4	13004992	12/10/2012	Open	Paid in Fu	Birth Cert	test testin	1/1/1950	test testin	test testin	(555)-111-1111		
5	13004991	12/10/2012	Open	Paid in Fu	Birth Cert	test testin	1/1/1950	test testin	test testin	(555)-111-1111		
6	13004990	12/10/2012	Open	Paid in Fu	Birth Cert	test testin	1/1/1950	test testin	test testin	(555)-111-1111		
7	13004989	12/10/2012	Open	Paid in Fu	Birth Cert	test testin	1/1/1950	test testin	test testin	(555)-111-1111		
8	13004988	12/10/2012	Open	Paid in Fu	Birth Cert	test testin	1/1/1950	test testin	test testin	(555)-111-1111		
9	13004987	12/10/2012	Open	Unsubmit	Birth Cert	test testin	1/1/1950	test testin	test testin	(555)-111-1111		
10	13004984	12/10/2012	Open	Paid in Fu	Birth Cert	test testin	1/1/1950	test testin	test testin	(555)-111-1111		
11	13004983	12/10/2012	Open	Paid in Fu	Birth Cert	test testin	1/1/1950	test testin	test testin	(555)-111-1111		
12	13003821	11/5/2012	Open	Paid in Fu	Birth Cert	Test Test	3/12/1985	test testin	test testin	(615)-372-7524		
13	13003818	11/5/2012	Closed	Paid in Fu	Birth Cert	Test Test	3/12/1985	dkljskj dfj	dkljskj dfj	(615)-372-7524		

5 How to Use Quick Search

Quick Search

Allows orders to be searched by the order number or the Client ID (Agency specific order identification number)

Quick Search 

Client ID 

Step 1 Enter VPS order number into [Quick Search](#) box or the Client ID in the [Client ID](#) field

Quick Search 

Client ID 

Step 2 Click magnifying glass icon



Step 3 Search results are displayed in [Order Details](#) screen

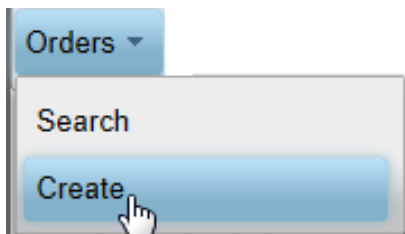
6 How to Enter Product Information

How to Enter Product Data

Product information is entered in the **Order Details** section from the **Orders>Create** menu item

Line Item	Product	Price	Reference #

Step 1 From the **Orders** menu, select **Create**



Step 2 The **Order Details** tab displays

Line Item	Product	Price	Reference #

Step 3 Choose the item for payment from the **Select New Product** drop down selection and click the **Add** button.

Note - Agencies that offer only 1 product will default to the available product.

Line Item	Product	Price	Reference #

Step 3 The product information box will display

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Traffic Citation

Product Information

Amount	<input type="text"/>
Citation Number	<input type="text"/>
Citation First Name	<input type="text"/>
Citation Last Name	<input type="text"/>
Citation Date	<input type="text"/>

OK Cancel

Step 4 Enter the **Amount** of the payment

Amount

Step 5 Enter all data fields as required by product and agency

Note - agencies that offer a split tax option will enter the tax amount and non-tax amounts

Auto w/Tax

Product Information

Title/Plate Number	<input type="text"/>
Tax Amount	<input type="text"/>
Non-Tax Amount	<input type="text"/>

OK Cancel

Step 6 Click **OK** button to add Product information to order

OK

7 Split Tax

Split Tax

Agencies that allow Split Tax payments take them by entering the "tax" and "non-tax" amount. Due to Visa regulations, a convenience fee is not allowed to be charged directly to a consumer for an in-person, non-tax, credit transaction.

This restriction also includes debit cards that are on the "Interlink" network, which most Visa debit cards operate on.

Agencies with a "tax" product may accept all types of credit cards for an in-person transaction as the convenience fee will only be charged on the tax portion of the transaction.

Agencies that offer split tax payments will display differently on the POS receipts and in VPS.

POS Receipts

POS receipts for Split Tax agencies display 3 lines (**Tax Amount**, **Non Tax Amount** and **VitalChek Convenience Fee**):

How to Use VitalChek Product Suite

Payment Services Demo
P. O. Box 1703
Brentwood, TN 37024-1703
(615) 372-1234

Terminal ID: 117
Date / Time: 1/23/12 3:51 PM CST
Confirmation #: 27869437

Card #: *****1112
Transaction Type: Payment \$4.00
Payment Type: Credit
Card Type: AMEX

Card #: *****1112
Transaction Type: Payment \$1.50
Payment Type: Credit
Card Type: AMEX

Card #: *****1112
Transaction Type: Payment \$5.00
Payment Type: Credit
Card Type: AMEX

Auto with Tax

12345A

Tax Amt: 1.50
Non Tax Amt: 5.00
Agency Amount: \$6.50
VitalChek Convenience Fee: \$4.00
Total Fee: \$10.50

X-----
NA NA
Agency Copy

VPS

Split tax payments display on 3 lines in VPS:

Payment									
#	Type	Amount	Card/Acct	Last Name	First Name	Status			
1	CC	1.65	MC 0248	testing	test	Authorized	Q	🗑	
2	CC	55.00	MC 0248	testing	test	Authorized	Q	🗑	
3	CC	20.00	MC 0248	testing	test	Authorized	Q	🗑	

Note - Voiding the payment of a single line on the split tax payment will void all 3 lines.

8 How to Enter Shipping Data

How to Enter Shipping Data

Shipping information, including shipping method and address, is in the [Shipping](#) section. Required fields are highlighted in yellow.

Note - Some Shipping fields may pre-populate based on Agency requirements

Step 1 Select [Shipping Method](#) from drop down list of available types of delivery methods

Select Shipping Method

Signature Required check box indicates that a signature is required at the time the certificate is delivered. Will be pre populated based on agency required

Step 2 Enter [First Name](#) of the person the order ships to

First Name

Step 3 Enter [Middle Name](#) of the person the order ships to

Middle Name

Step 4 Enter [Last Name](#) of the person the order ships to

Last Name

Step 5 Select [Suffix](#) of the person the order ships to from drop down list

Suffix

Step 6 Select address type from drop down ([Domestic](#), [International](#), [Military](#))

Address Type

Step 7 Enter [Zip Code](#) of shipping address. The Zip Code entered will automatically populate the [City](#) and [State](#) fields

Zip Code

How to Use VitalChek Product Suite

Step 8 Enter shipping street **Address**

Address 1

Step 9 If necessary, enter additional shipping **Address** information

Address 2

Step 10 Enter shipping **City** if not correct from **Zip Code** entry (step 8)

City

Step 11 Enter shipping **State** if not correct from **Zip Code** entry (step 8)

State

Step 12 **Country** defaults and locks on United States for **Domestic** orders (step 7). orders that ship to an **International** address will need a **Country** selected from the drop down list

Country

Step 13 Enter email address if required

Email

Step 14 Enter 10 digit **Phone** number of person the order is shipped to

Phone

9 How to Enter Payment with a Personal Check (electronic)

How to Enter Payment with a Personal Check

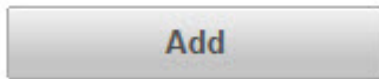
The Payment line is accessed from the **Orders -Create** menu item, **Order Details** tab. The **Payment** line expands to allow user to enter payment information

Step 1 Select **Personal Check** from **Select New Payment** drop down.

Note - Agencies that offer only 1 payment type default to that available payment type.

Step 2 Click **Add** button

How to Use VitalChek Product Suite



Step 3 **Payment** screen for Check selection is displayed

Payment

Same As Shipping

Disclaimer
The Customer authorizes the Merchant (LexisNexis Payment Solutions) to convert their check to an Electronic Funds Transfer or Paper Draft, and to debit their account for the total transaction amount. In the event that the draft or EFT is returned unpaid, the Customer agrees that a fee of \$30.00 or as allowable by law may be charged to their account via draft or EFT.
Once this request is completed, it cannot be cancelled because the funds are guaranteed. If the customer has any questions regarding this authorization, they may contact Customer Service at 866-255-1857.

Click here to indicate that the caller has been informed of the above disclaimer

Routing No. Account No. Check Number
Routing No. Conf Account No. Conf Check No. Conf
Drivers License No. Issuing State Date of Birth
SSN

First Name Address Type City
Middle Name Zip Code State
Last Name Address 1 Country
Suffix Address 2 Phone
Email

OK Cancel

Step 4 Check **Same as Shipping** if the person making the payment is the same as the person placing the order. *Checking **Same as Shipping** will populate name and address information.*



Note - If agency offers a Multiple/Partial Payments option, check box will

Step 5 Check **Disclaimer Confirmation** box indicating the caller has been informed of the Disclaimer

Disclaimer
The Customer authorizes the Merchant (VitalChek) to convert their check to an Electronic Funds Transfer or Paper Draft, and to debit their account for the total transaction amount. In the event that the draft or EFT is returned unpaid, the Customer agrees that a fee of \$30.00 or as allowable by law may be charged to their account via draft or EFT.
Once this request is completed, it cannot be cancelled because the funds are guaranteed. If the customer has any questions regarding this authorization, they may contact Customer Service at 888-412-1838.

Click here to indicate that the caller has been informed of the above disclaimer

Step 6 Enter **Routing No.** (number) of the checking account used for payment

Routing No.

Step 7 Reenter **Routing No. (Conf.)** for confirmation of the checking account routing number used for payment

Routing No. Conf

Step 8 Enter **Drivers License No.** (number) of the person who is making payment (using their checking account)

Drivers License No.

*Note - **SSN** (Social Security Number) of the person making payment on the order (checking account holder) may be required based on Agency*

SSN

Step 9 Enter **Account No.** of the checking account used for payment

Account No.

Step 10 Reenter **Account No.** (Confirmation) of the checking account used for payment

Account No. Conf

Step 11 Select the state where the Drivers License was issued from using the **Issuing State** drop down selection

Issuing State

Step 12 Enter **Check Number** of the check used for payment

Check Number

Step 13 Reenter **Check No. (Conf)** of the check used for payment

Check No. Conf

Step 14 Enter **Date of Birth** of person making the payment (checking account holder)

Date of Birth

Step 15 Complete all name and address fields.

*Note - clicking to select **Same as Applicant** or **Same as Shipping** will populate address fields*

Step 16 Enter **First Name** of person making payment on the order (checking account holder)

How to Use VitalChek Product Suite

First Name

Step 17 Enter **Middle Name** of person making payment on the order (checking account holder)

Middle Name

Step 18 Enter **Last Name** of person making payment on the order (checking account holder)

Last Name

Step 19 Select **Suffix** of the person making payment on the order (checking account holder)

Suffix

Step 20 Enter the **Email** address of the person making payment on the order (checking account holder)

Email

Step 21 Enter **Address Type** of the person making payment on the order (checking account holder)

Address Type

Step 22 Enter **Zip Code** of the person making the payment on the order (checking account holder)

Zip Code

Step 23 Enter **Street Address** of the person making payment on the order (checking account holder)

Address 1

Step 24 Enter additional **Street Address** of the person making payment on the order (checking account holder)

Address 2

Step 25 Enter **City** of the person making the payment on the order (checking account holder)

City

Step 26 Enter **State** of the person making the payment on the order (checking account holder)

State

Step 27 Enter **Country** of the person making the payment on the order (checking account holder). Note - this defaults to United States of America

Country

Step 28 Enter 10 digit **Phone** number of person making payment on the order (checking account holder)

Phone

Step 29 Click **OK** button

Step 30 Check payment confirmation is displayed

Payment

Select New Payment

#	Type	Amount	Card/Acct	Last Name	First Name	Status	County				
1	PC	0.00	1111	testing	test		Robertson				

Step 31 **Authorize Payment** button will display, click to authorize payment

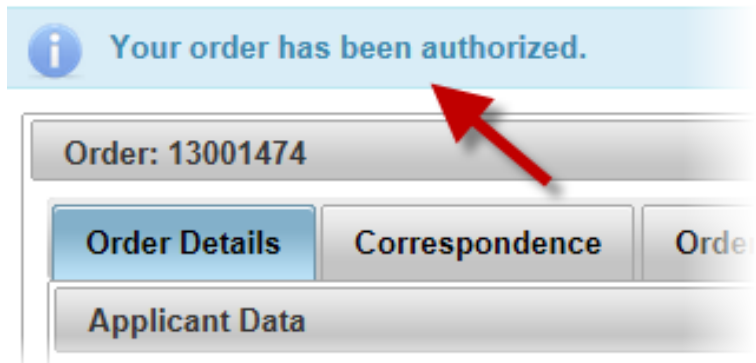
Fee Data

Agency	8.00
Expedite	5.00
Misc	0.00
VitalChek	10.00
Shipping	16.50
Other	0.00
Total	39.50

Copy Auth

Step 32 Order is authorized and the following is displayed:

How to Use VitalChek Product Suite



Authorized message appears:

Payment **Status** changes to **Paid in Full**:

A screenshot of a "Status" section in a web interface. It features a header "Status" and a dropdown menu for "Entitlement" currently set to "QC Approved". Below the dropdown, there are two rows of text: "Order Open" and "Payment Paid in Full".

Payment information in Status section displays **Authorized**

A screenshot of a "Payment" table in a web interface. The table has a header row with columns: #, Type, Amount, Card/Acct, Last Name, First Name, Status, and a search icon. Below the header is one data row with the following values: 1, PC, 46.50, 6666, testing, test, Authorized. Above the table is a "Select New Payment" dropdown menu and an "Add" button.

#	Type	Amount	Card/Acct	Last Name	First Name	Status	
1	PC	46.50	6666	testing	test	Authorized	🔍

10 How to Enter Payment with a Business Check (electronic)

How to Enter Payment with a Business Check

The Payment line is accessed from the **Orders -Create** menu item, **Order Details** tab. The **Payment** line expands to allow user to enter payment information

Step 1 Select **Business Check** from **Select New Payment** drop down.

Note - Agencies that offer only 1 payment type default to that available payment type.

Step 2 Click **Add** button

Step 3 **Payment** screen for Check selection is displayed

How to Use VitalChek Product Suite

Payment

Same As Shipping

Disclaimer
The Customer authorizes the Merchant (LexisNexis Payment Solutions) to convert their check to an Electronic Funds Transfer or Paper Draft, and to debit their account for the total transaction amount. In the event that the draft or EFT is returned unpaid, the Customer agrees that a fee of \$30.00 or as allowable by law may be charged to their account via draft or EFT.
Once this request is completed, it cannot be cancelled because the funds are guaranteed. If the customer has any questions regarding this authorization, they may contact Customer Service at 866-255-1857.
 Click here to indicate that the caller has been informed of the above disclaimer

Routing No. Account No. Check Number
Routing No. Conf Account No. Conf Check No. Conf

Business Acct Name Address Type City
Business Phone No. Zip Code State
Address 1 Country
Address 2 Phone

Email

OK Cancel

Step 4 Check **Same as Shipping** if the person making the payment is the same as the person placing the order. *Checking **Same as Shipping** will remove name and address information from screen.*

Same As Shipping

Step 5 Check **Disclaimer Confirmation** box indicating the caller has been informed of the Disclaimer

Disclaimer
The Customer authorizes the Merchant (VitalChek) to convert their check to an Electronic Funds Transfer or Paper Draft, and to debit their account for the total transaction amount. In the event that the draft or EFT is returned unpaid, the Customer agrees that a fee of \$30.00 or as allowable by law may be charged to their account via draft or EFT.
Once this request is completed, it cannot be cancelled because the funds are guaranteed. If the customer has any questions regarding this authorization, they may contact Customer Service at 888-412-1838.
 Click here to indicate that the caller has been informed of the above disclaimer

Step 6 Enter **Routing No.** (number) of the business checking account used for payment

Routing No.

Step 7 Reenter **Routing No. (Conf.)** for confirmation of the checking account routing number used for payment

Routing No. Conf

Step 8 Enter **Account No.** of the checking account used for payment

Account No.

Step 9 Reenter **Account No (Conf.)** of the business checking account used for payment

Account No. Conf

Step 10 Enter **Check Number** of the check used for payment

Check Number

Step 11 Reenter **Check No. (Conf)** of the check used for payment

Check No. Conf

Step 12 Enter the **Business Account Name** of the business listed on the check

Business Acct
Name

Step 13 Enter the **Business Phone Number** of the business listed on the check

Business Phone
No.

Step 14 Enter the **Email** address of the person making payment on the order (checking account holder)

Email

Step 15 Enter **Address Type** of the business making payment on the order (business checking account)

Address Type

Step 16 Enter **Zip Code** of the business making the payment on the order (business checking account)

Zip Code

Step 17 Enter **Street Address** of the business making payment on the order (business checking account)

Address 1

Step 18 Enter additional **Street Address** of the business making payment on the order (business checking account)

Address 2

How to Use VitalChek Product Suite

Step 19 Enter **City** of the business making the payment on the order (business checking account)

City

Step 20 Enter **State** of the business making the payment on the order (business checking account)

State

Step 21 Enter **Country** of the business making the payment on the order (business checking account)

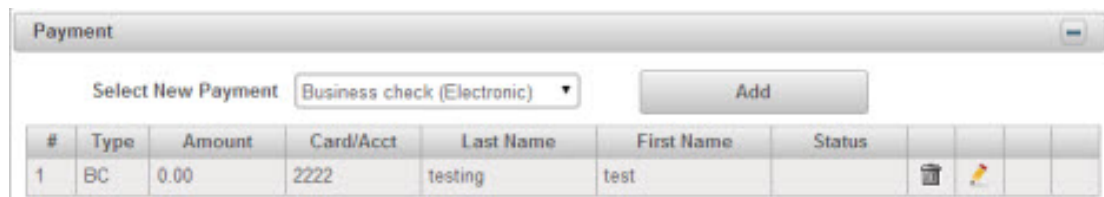
Country

Step 22 Enter 10 digit **Phone** number of business making payment on the order (business checking account)

Phone

Step 23 Click **OK** button

Step 24 Check payment information is displayed



Payment

Select New Payment

#	Type	Amount	Card/Acct	Last Name	First Name	Status				
1	BC	0.00	2222	testing	test					

Step 25 **Authorize Payment button will display, click to authorize payment**

Fee Data	
Agency	8.00
Expedite	5.00
Misc	0.00
VitalChek	10.00
Shipping	16.50
Other	0.00
Total	39.50

Update/Save

Authorize Payment

Cancel Order

Copy

Copy Auth

Step 26 Order is authorized and the following is displayed:

i Your order has been authorized.

Order: 13001474

Order Details Correspondence Order

Applicant Data

Authorized message appears:

Payment **Status** changes to **Paid in Full**:

Status

Entitlement QC Approved ▾

Order Open

Payment Paid in Full

Payment information in Status section displays **Authorized**

Payment							
Select New Payment		Business check (Electronic) ▾		Add			
#	Type	Amount	Card/Acct	Last Name	First Name	Status	
1	BC	46.50	2222	testing	test	Authorized	🔍

11 How to Enter Payment with a Credit Card

How to Enter Payment with a Credit Card

Credit Card payment information displays in the **Payment** section

The screenshot shows a 'Payment' form with a grey header. Below the header is a 'Same As Shipping' checkbox. The main form area contains several input fields: 'Card No.' and 'Expiration Date(MM/YYYY)' are highlighted in yellow. Below these are fields for 'First Name', 'Middle Name', 'Last Name', 'Suffix', and 'Email'. To the right of the name fields are 'Address Type' (set to 'Domestic'), 'City', 'Zip Code', 'State', 'Address 1', 'Address 2', 'Country' (set to 'United States of Amer'), and 'Phone'. At the bottom of the form are 'OK' and 'Cancel' buttons.

Step 1 Select **Credit Card** from **Select New Payment** drop down.

Note - Agencies that offer only 1 payment type default to that available payment type.

This screenshot shows the top portion of the 'Payment' form. The 'Select New Payment' dropdown menu is open, showing 'Credit Card' selected. An 'Add' button is visible to the right of the dropdown. Below this is a table header with columns: '#', 'Type', 'Amount', 'Card/Acct', 'Last Name', 'First Name', 'Status', and 'County'.

Step 2 Click **Add** button

A close-up of the 'Add' button, which is a grey rectangular button with the word 'Add' in black text.

Step 3 **Payment** screen is displayed for credit card payments

Step 4 Check **Same as Shipping** if the person making the payment is the same as the person placing the order. *Checking **Same as Shipping** will remove name and address information from screen.*

Same As Shipping

Step 5 Enter Credit **Card No.** (number)

Card No.

Step 6 Enter credit card **Expiration Date** (MM/YYYY)

Expiration Date(MM/YYYY)

Step 7 Complete all name and address fields.

*Note - clicking to select **Same as Shipping** will populate address fields*

Step 8 Enter **First Name** of person making payment on the order (credit card holder)

First Name

Step 9 Enter **Middle Name** of person making payment on the order (credit card holder)

Middle Name

Step 10 Enter **Last Name** of person making payment on the order (credit card holder)

Last Name

Step 11 Select **Suffix** of the person making payment on the order (credit card holder)

Suffix

Step 12 Enter **email** of the person making the payment on the order

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Email

Step 13 Enter **Address Type** of the person making payment on the order (credit card holder)

Address Type

Step 14 Enter **Zip Code** of the person making the payment on the order (credit card holder)

Zip Code

Step 15 Enter **Street Address** of the person making payment on the order (credit card holder)

Address 1

Step 16 Enter additional **Street Address** of the person making payment on the order (credit cardholder)

Address 2

Step 17 Enter **City** of the person making the payment on the order (credit card holder)

City

Step 18 Enter **State** of the person making the payment on the order (credit card holder)

State

Step 19 Enter **Country** of the person making the payment on the order (credit card holder)

Country

Step 20 Enter 10 digit **Phone** number of person making payment on the order (credit card holder)

Phone

Step 21 Click **Add** button

Step 22 Credit card payment information is displayed

Payment

Select New Payment

#	Type	Amount	Card/Acct	Last Name	First Name	Status	County			
1	CC	0.00	MC 0248	testing	test		Hill	<input type="button" value="Delete"/>	<input type="button" value="Edit"/>	

Step 23 **Authorize Payment** button will display, click to authorize payment

Fee Data	
Agency	8.00
Expedite	5.00
Misc	0.00
VitalChek	10.00
Shipping	16.50
Other	0.00
Total	39.50

Copy Auth

Step 24 Order is authorized and the following is displayed:

i Your order has been authorized.

Order: 13001474

Order Details
Correspondence
Order

Applicant Data

Authorized message appears:

Payment **Status** changes to **Paid in Full**:

Status

Entitlement QC Approved ▾

Order Open

Payment **Paid in Full**

Payment information in Status section displays **Authorized**

Payment							
#	Type	Amount	Card/Acct	Last Name	First Name	Status	County
1	CC	53.95	MC 0248	testing	test	Authorized	Hill

12 How to Edit a Payment

How to Edit a Payment

Users can change information about the payment using the Edit Payment process.

*Note - Only orders that have a payment status of **Unsubmitted** may be edited.*

Step 1 From the Payment section in the Order Details tab, click the pencil icon to edit the payment



Step 2 Edit Payment box opens with the original payment information displayed

Credit Card

Payment

Same As Shipping

Card No. *****0248 Expiration Date(MM/YYYY) 02/2014

First Name test Address Type Domestic City East Syracuse
Middle Name Zip Code 13057 State NY
Last Name test Address 1 12 Any St Country United States of Amer
Suffix Address 2 Phone (555)123-4567
Email lmangrum@vitalchek.com

OK Cancel

Check (Personal)

Payment

Same As Shipping

Disclaimer
 The Customer authorizes the Merchant (VitalChek) to convert their check to an Electronic Funds Transfer or Paper Draft, and to debit their account for the total transaction amount. In the event that the draft or EFT is returned unpaid, the Customer agrees that a fee of \$25.00 or as allowable by law may be charged to their account via draft or EFT.

Click here to indicate that the caller has been informed of the above disclaimer

Routing No. ****9999 Account No. *****111111 Check Number 111
 Routing No. Conf ****9999 Account No. Conf *****111111 Check No. Conf 111
 Drivers License No. ***** Issuing State TN Date of Birth *****
 SSN

First Name test Address Type Domestic City East Syracuse
 Middle Name Zip Code 13057 State NY
 Last Name testing Address 1 12 Any St Country United States of Amer
 Suffix Address 2 Phone (555) 55-5555
 Email test@vitalchek.com

OK Cancel

Check (Business)

Payment

Same As Shipping

Disclaimer
 The Customer authorizes the Merchant (VitalChek) to convert their check to an Electronic Funds Transfer or Paper Draft, and to debit their account for the total transaction amount. In the event that the draft or EFT is returned unpaid, the Customer agrees that a fee of \$25.00 or as allowable by law may be charged to their account via draft or EFT.

Click here to indicate that the caller has been informed of the above disclaimer

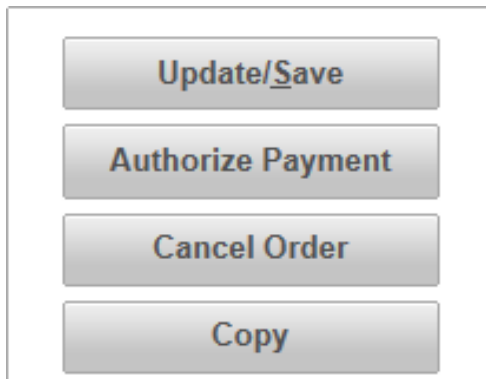
Routing No. 999999999 Account No. 111111111 Check Number 111
 Routing No. Conf 999999999 Account No. Conf 111111111 Check No. Conf 111

Business Acct Name test testing Address Type Domestic City East Syracuse
 Business Phone No. (555)555-5555 Zip Code 13057 State NY
 Address 1 12 Any St Country United States of Amer
 Address 2 Phone (555)555-5555
 Email test@vitalchek.com

OK Cancel

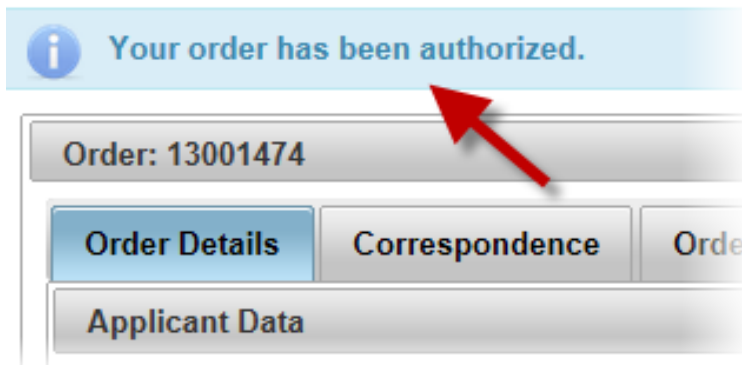
- Step 3 User makes necessary changes
- Step 4 Click **OK** to save changes and return to **Order Details** screen
- Step 5 **Authorize Payment** button will display.

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Step 6 Click [Authorize Payment](#) to process the payment

Step 7 Order authorized message appears, payment **Status** changes to **Authorized** and Payment information in Status section displays **Paid in Full**



13 How to Void a Payment

How to Void a Payment

Orders that have been "**Paid in Full**" can be voided until closeout process has been complete.

Note - Agencies that allow Agency Initiated Credits are able to refund payment on an order AFTER the closeout process is complete. See **How to Issue Credits After Closeout ('How to Issue Credits After Closeout (Agency Initiated Credits)'** in the on-line documentation)

Step 1 View the order to be voided in one of the **Order Create** tabs (**Order Details, Order Summary, or Comments**)

Line Item	Product	Price	Reference #
1	Court Fine	1.00	87-98765

#	Type	Amount	Card/Acct	Last Name	First Name	Status
1	CC	4.50	MC 0248	test	test	Authorized

Fee Data	
Agency	1.00
Expedite	0.00
Misc	0.00
VitalChek	3.50
Shipping	0.00
Other	0.00
Total	4.50

Step 2 Click the **Void** button

Update/Save

Print Receipt

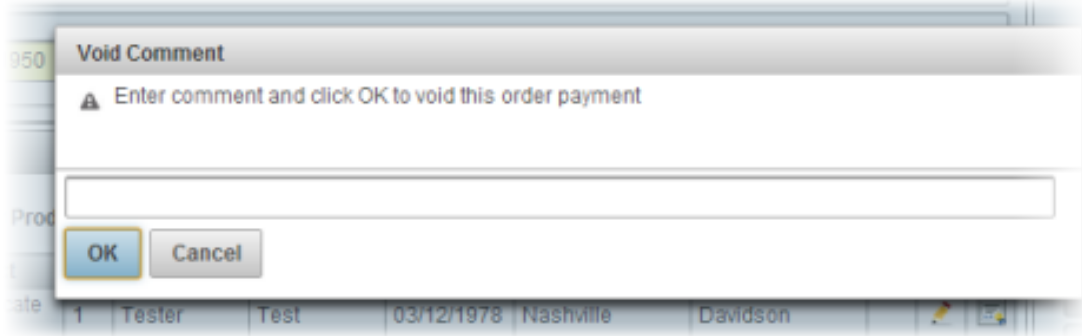
Void

Copy

Copy Auth

*Note - Based on agency requirements, a **Void Comment** dialog box may appear; enter the reason for the void and press **OK***

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Step 3 Order is voided and **Payment Status** changes to **Refunded**

Status	
Order	Open
Payment	Refunded

Source	Phone	▼
--------	-------	---

14 How to Add Comments to an Order

How to Add Comments to an Order

Comments are added to an order in the Comments section, from the [Comments](#) tab

Order: 13001317

Order Details | Correspondence | Order Summary | **Comments**

	Comment Date	User	Visibility	Comment
	03/03/2013 09:46 AM CST	Allison K.	Public	This order was copied to create order 1300166-

Full Comment Text

This order was copied to create order 13001664

New Comment

Make this comment public

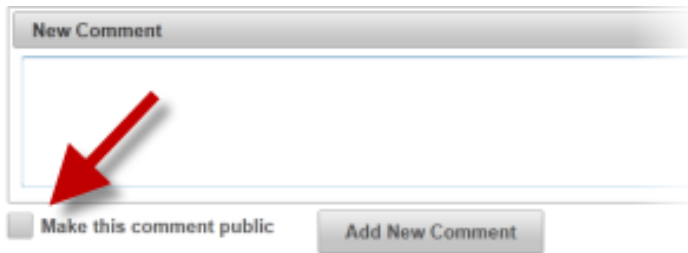
Step 1 Enter comment text in the [Add New Comment](#) box

New Comment

Make this comment public

Step 2 Check the [Make this comment public](#) to allow VitalChek staff to view comment, or leave unchecked to keep comment only viewable by agency staff

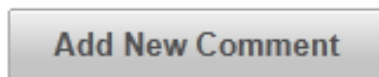
How to Use VitalChek Product Suite



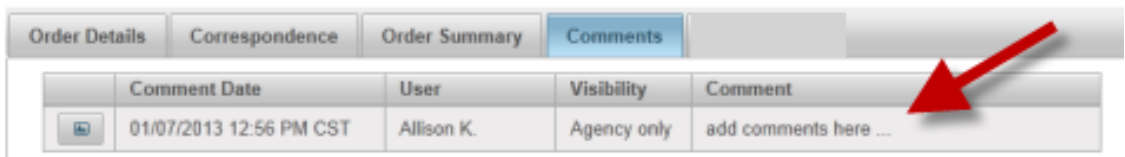
New Comment

Make this comment public

Step 3 Click [Add Comment](#) button to add comment to order

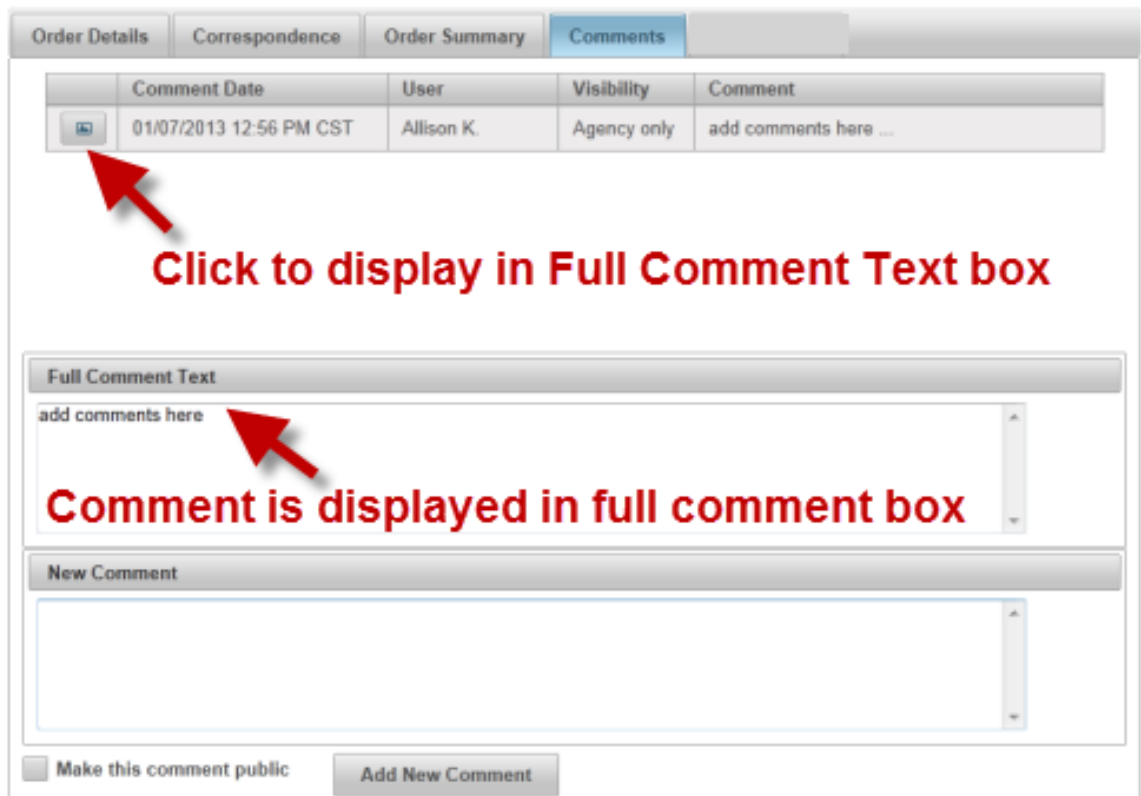


Step 4 Comment details will be displayed in the comment information box



	Comment Date	User	Visibility	Comment
<input type="button" value="ⓧ"/>	01/07/2013 12:56 PM CST	Allison K.	Agency only	add comments here ...

Step 5 Click on line item in comment information box to display the complete comment in [Full Comment Text](#) box



Order Details Correspondence Order Summary **Comments**

	Comment Date	User	Visibility	Comment
<input type="button" value="ⓧ"/>	01/07/2013 12:56 PM CST	Allison K.	Agency only	add comments here ...

Click to display in Full Comment Text box

Full Comment Text

add comments here

Comment is displayed in full comment box

New Comment

Make this comment public

15 How to View Comments

How to View Comments

Comments are viewed in the Comments section, from the **Comments** tab

Order: 13001317

Order Details | Correspondence | Order Summary | **Comments**

	Comment Date	User	Visibility	Comment
	03/03/2013 09:46 AM CST	Allison K.	Public	This order was copied to create order 1300166-

Full Comment Text

This order was copied to create order 13001664

New Comment



Make this comment public

Step 1 From the **Orders** Section, with Order displayed, click **Comment** tab. Details on the comments that have been added to the order will be displayed in the Comment **Created** box

How to Use VitalChek Product Suite

Order: 13001317

Order Details Correspondence Order Summary **Comments**

	Comment Date	User	Visibility	Comment
	03/03/2013 11:18 AM CST	Allison K.	Agency only	Enter new comments ...
	03/03/2013 09:46 AM CST	Allison K.	Public	This order was copied to create order 1300166.

Full Comment Text

Enter new comments

New Comment

Make this comment public **Add New Comment**

Step 2 Click on the image icon to display comment

	Comment Date	User	Visibility	Comment
	03/03/2013 11:18 AM CST	Allison K.	Agency only	Enter new comments ...
	03/03/2013 09:46 AM CST	Allison K.	Public	This order was copied to create order 1300166.

Step 3 Full text comment will be displayed in the **Full Comment Text** box

Full Comment Text

Enter new comments

16 How to Cancel an Order

How to Cancel an Order

Orders can be cancelled at any time (prior to the end of day closeout process) until they have been paid. Once an order has a paid-in-full status, the payment must be voided, and then the order can be cancelled.

Note - Agencies that allow Agency Initiated Credits are able to refund payment on an order AFTER the closeout process is complete. See **How to Issue Credits After Closeout ('How to Issue Credits After Closeout (Agency Initiated Credits)'** in the on-line documentation)

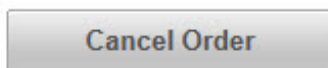
Step 1 View the order to be **Cancelled** in one of the **Order Create** tabs (**Order Details, Order Summary, or Comments**)

Line Item	Product	Price	Reference #
1	Court Fine	1.00	87-98765

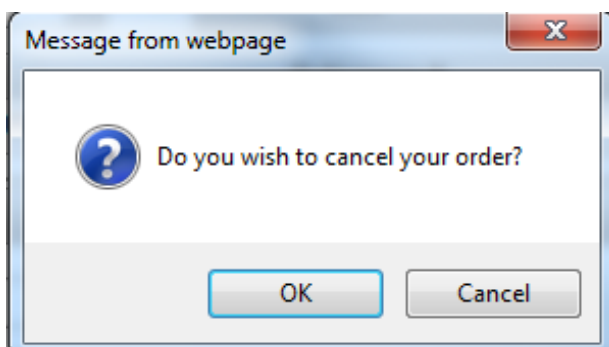
#	Type	Amount	Card/Acct	Last Name	First Name	Status
1	CC	4.50	MC 0248	test	test	Voided

Fee Data	
Agency	1.00
Expedite	0.00
Misc	0.00
VitalChek	3.50
Shipping	0.00
Other	0.00
Total	4.50

Step 2 Click the **Cancel Order** button



Step 3 Cancel Order message is displayed. Click **OK** to confirm.



How to Use VitalChek Product Suite

Step 4 Order is cancelled and **Order Status** changes to **Cancelled**

Status	
Order	Cancelled
Payment	Refunded

17 How to Reinstate a Cancelled Order

How to Reinstate a Cancelled Order Orders that have been cancelled can be reinstated

Step 1 View the **Cancelled** order in one of the **Order Create** tabs (**Order Details, Order Summary, or Comments**)

Order: 13001317

Order Details | Correspondence | Order Summary | Comments

Line Item	Product	Price	Reference #
1	Court Fine	1.00	87-98765

Payment

Select New Payment Add

#	Type	Amount	Card/Acct	Last Name	First Name	Status
1	CC	4.50	MC 0248	test	test	Voided

Fee Data

Agency	1.00
Expedite	0.00
Misc	0.00
VitalChek	3.50
Shipping	0.00
Other	0.00
Total	4.50

Reinstate Order

Copy

Step 2 Click the **Reinstate Order** button

Order: 13001317

Order Details | Correspondence | Order Summary | Comments

Line Item	Product	Price	Reference #
1	Court Fine	1.00	87-98765

Payment

Select New Payment Add

#	Type	Amount	Card/Acct	Last Name	First Name	Status
1	CC	4.50	MC 0248	test	test	Voided

Fee Data

Agency	1.00
Expedite	0.00
Misc	0.00
VitalChek	3.50
Shipping	0.00
Other	0.00
Total	4.50

Reinstate Order

Copy

Step 3 Order is reinstated, **Order Status** changes to **Open** and **Authorize Payment** button is displayed.

How to Use VitalChek Product Suite

The screenshot displays a web interface for managing an order. It features several sections: a status section with a dropdown menu, a source dropdown, a fee data table, and a vertical stack of action buttons. Two red arrows highlight the 'Status' dropdown and the 'Authorize Payment' button.

Status

Order Open
Payment Refunded

Source Phone

Fee Data

Agency	1.00
Expedite	0.00
Misc	0.00
VitalChek	3.50
Shipping	0.00
Other	0.00
Total	4.50

Update/Save

Print Receipt

Authorize Payment

Cancel Order

Copy

18 How to Print Batch Receipts

How to Print Batch Receipts

Contains sections on [Date Range](#). Users must have a role of [Clerk](#), [Supervisor](#) or [Manager](#) to be able to view and access [Batch Receipts](#)

The screenshot shows the top navigation bar with 'Orders', 'Fulfillment', 'Closeout', 'Reports', 'Administration', and 'Payment Services Demo (34031)'. Below this is a tabbed interface with 'Create Receipt' and 'Reprint Receipt'. The 'Create Receipt' tab is active. Underneath, there is a 'Date Range' section with two input fields: 'Start Date' and 'End Date', both containing the date '01/14/2013'. At the bottom of this section are two buttons: 'Create Receipts' and 'Clear'.

Step 1 From the [Fulfillment](#) menu, select [Batch Receipts](#). Opens on [Create Receipt](#) tab

This screenshot is identical to the one above, showing the 'Create Receipt' tab and the 'Date Range' section with 'Start Date' and 'End Date' fields set to '01/14/2013'.

Step 2 Select [Start Date](#), or date to begin to search for receipts. Defaults to current date

Start Date

Step 3 Select [End Date](#), or date to end search for receipts. Defaults to current date

End Date

Step Click [Create Receipts](#) button

How to Use VitalChek Product Suite

4

The screenshot shows the top navigation bar with 'Orders', 'Fulfillment', 'Closeout', 'Reports', 'Administration', and 'Payment Services Demo (34031)'. Below this are two buttons: 'Create Receipt' and 'Reprint Receipt'. A 'Date Range' section contains 'Start Date' and 'End Date' fields, both set to '01/14/2013'. At the bottom, there are two buttons: 'Create Receipts' and 'Clear'. A red arrow points to the 'Create Receipts' button.

Note - Once the user has clicked the **Create Receipts** button, the **Date Range** fields will be locked and may only be changed after clicking the **Clear** button to clear the selections

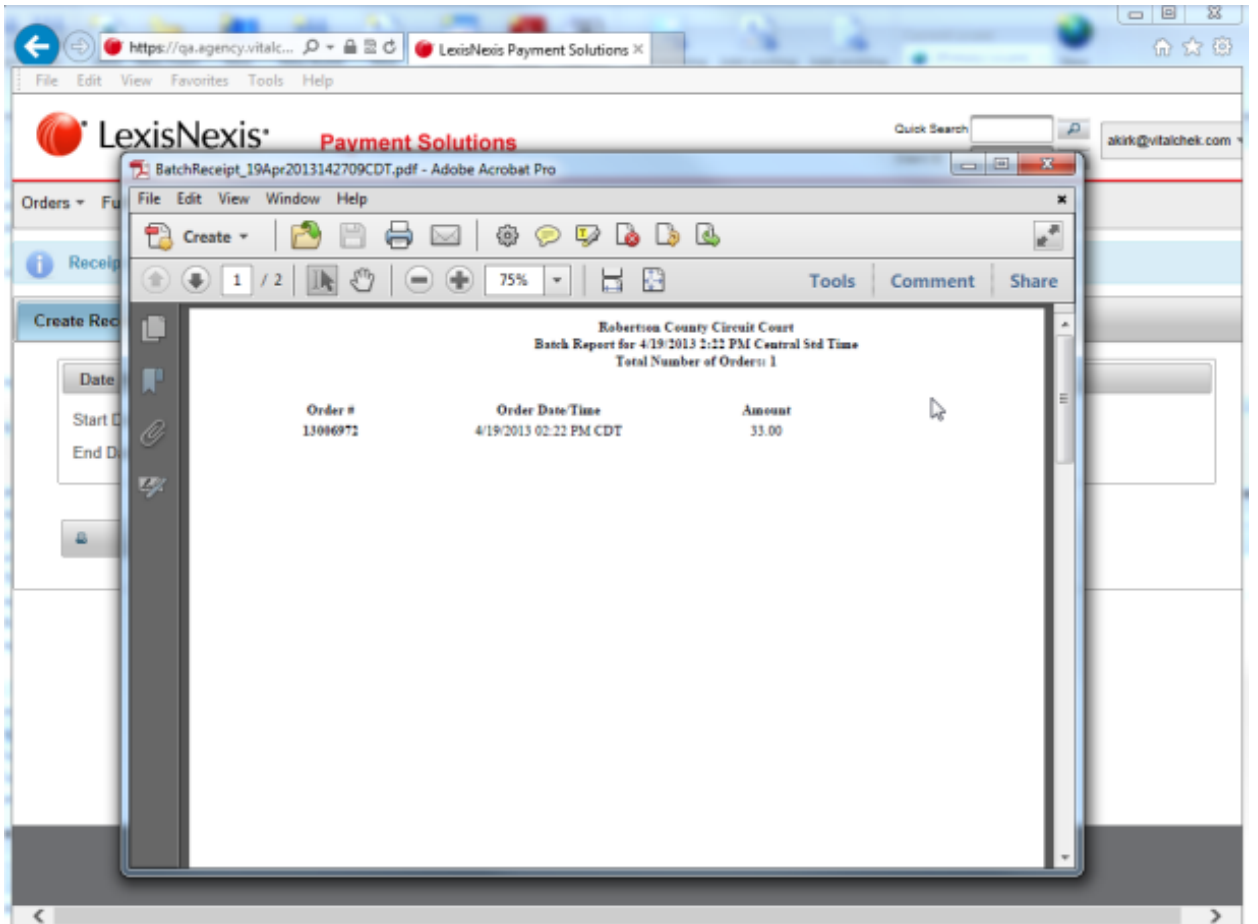
Step
5

Batch Receipts are created and confirmation message displays. **Create Receipts** button is replaced with **Print** button and Date Range criteria is grayed out and uneditable

The screenshot shows the same navigation bar. A blue information message bar at the top reads: 'Receipts were created for the current selection criteria. Use Print button to print them.' Below this are the 'Create Receipt' and 'Reprint Receipt' buttons. The 'Date Range' section now shows 'Start Date' and 'End Date' fields both set to '04/19/2013'. At the bottom, there are two buttons: 'Print' and 'Clear'. A red arrow points to the 'Print' button.

Click **Print** button to display receipt in .pdf window

How to Use VitalChek Product Suite



Scroll down to view entire receipt

Payment Services Demo			
Order Date/Time	4/13/2012 09:16 AM CDT	Agency Amount	\$125.00
Order Number	15907682	Other Agency Amount	\$0.00
Operator	ALBOKK	Shipping Amount	\$0.00
Source	Web	VitalChek Amount	\$2.66
		Total Amount	\$127.66
Payment Information			
Amount	Product	Product Detail	
\$125.00	Water Bill	12345 123 Circle Court	

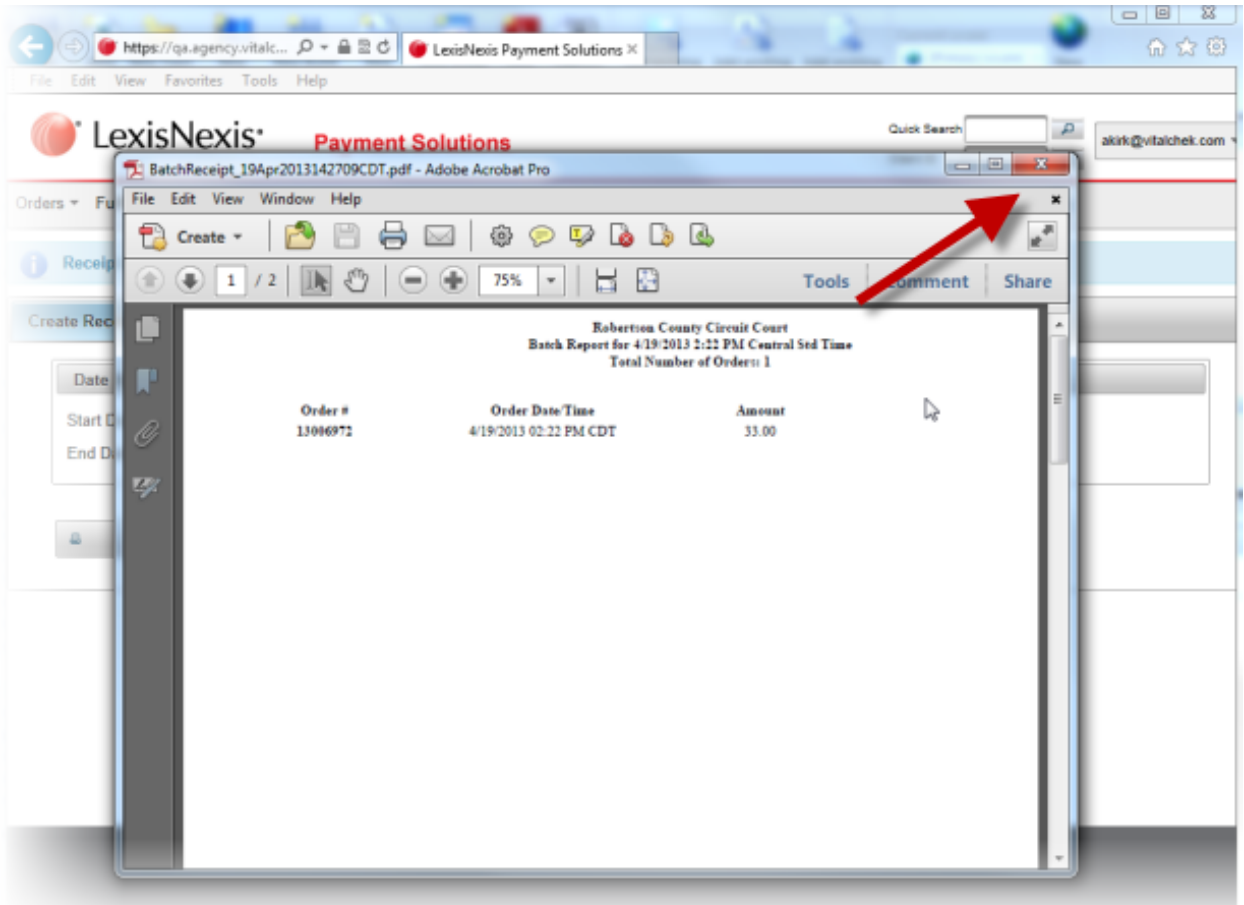
Payment Services Demo			
VitalChek Receipt			
Date/Time	4/13/2012 09:16 AM CDT		
Confirmation Number	15907682		
Operator	ALBOKK		
Payment applied towards:	Water Bill		
Payment Method:	V/C(111)		
Bill To			
Test Testing		Agency Amount	\$125.00
123 Happy St		Other Agency Amount	\$0.00
Brentwood, TN 37027		VitalChek Amount	\$2.66
United States of America		Total Amount	\$127.66

How to Use VitalChek Product Suite

Step 6 Print Batch Receipts by clicking on printer icon



Step 7 Click red X to close out of the .Pdf



Step 8 User is returned to VPS, **Create Receipts** screen

Orders ▾ Fulfillment ▾ Closeout ▾ Reports ▾ Administration ▾ Payment Services Demo (34031) ▾

Receipts were created for the current selection criteria. Use Print button to print them.

Create Receipt Reprint Receipt

Date Range

Start Date

End Date

*Note - If receipt criteria was selected (ie **Date Range**) - to print additional receipts with new criteria/selections - click the **Clear** button to clear current selections and then repeat steps 2 - 5. Previous selections will remain grayed out and uneditable until the **Clear** button is clicked.*

19 How to Generate Shipping Labels

How to Generate Shipping Labels

Shipping labels are generated to address and send certificates.

Users must have a role of **Clerk**, **Supervisor** or **Manager** to be able to view and access **Shipping** functions.

The screenshot shows the 'Shipping Labels' interface. At the top, there are four tabs: 'Generate Labels' (selected), 'Void Labels', 'UPS Manifest', and 'Mail'. Below the tabs is a form with an 'Order Number' input field, a 'Submit' button, and an 'Order Count 0' label. Below the form is a table with the following columns: 'Order Number', 'Tracking Number/Status', 'Certificate Holder', 'Ship To', and 'Shipping Address'. A 'Clear' button is located at the bottom left of the table area.

Step 1 From the **Fulfillment** menu, select **Shipping Labels**. **Generate Labels** tab is displayed.

This screenshot is identical to the one above, showing the 'Shipping Labels' interface with the 'Generate Labels' tab selected.

Step 2 Enter **Order Number** and click **Submit** button

*Note - User can also enter **Order Number** and a plus sign ("+") at the end of the number. Order will automatically submit*

The screenshot shows a close-up of the 'Order Number' input field containing the text '13004991' and a 'Submit' button to its right.

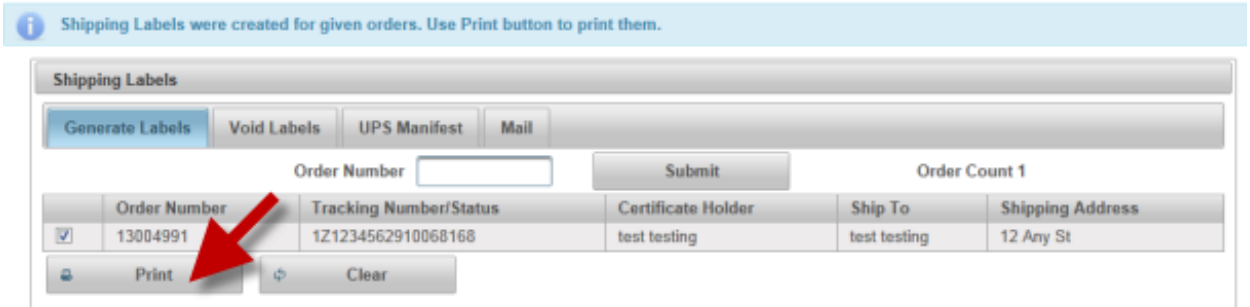
Step 3 Order(s) will be displayed in table. Click check box to check and select order to generate shipping label

	Order Number	Tracking Number/Status	Certificate Holder	Ship To	Shipping Address
<input checked="" type="checkbox"/>	13004991		test testing	test testing	12 Any St

Step 4 Click Generate Labels button

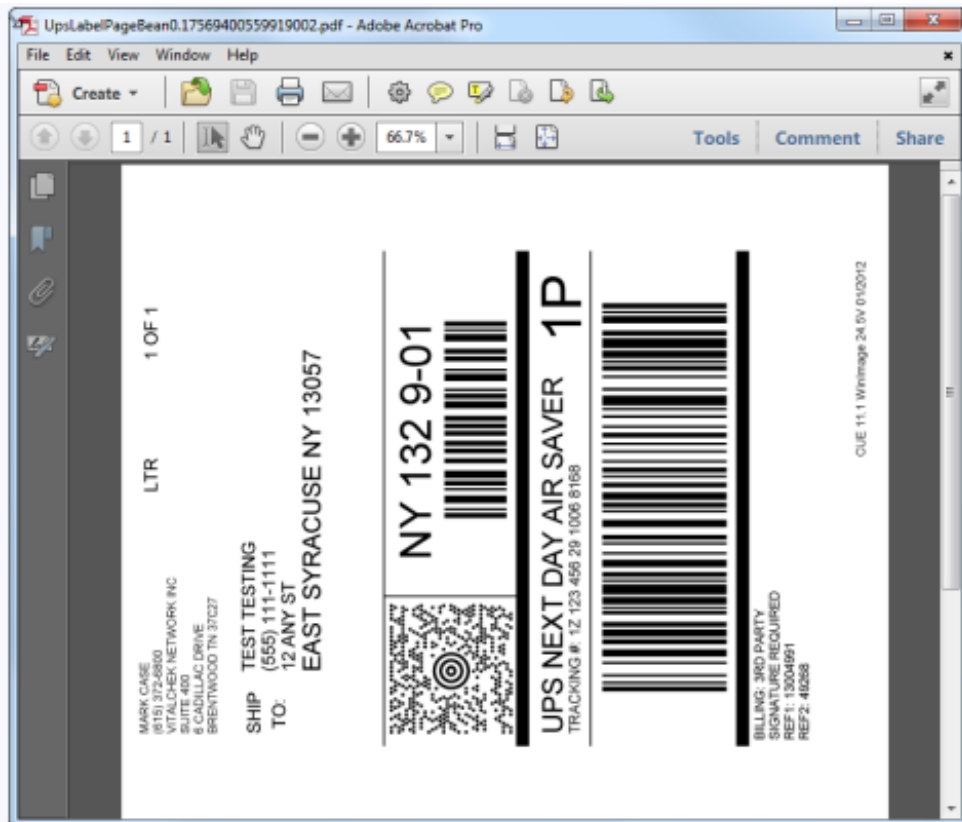
The screenshot shows a button with a right-pointing arrow and the text 'Generate Label'.

Step 5 Shipping label message is displayed; click **Print** button

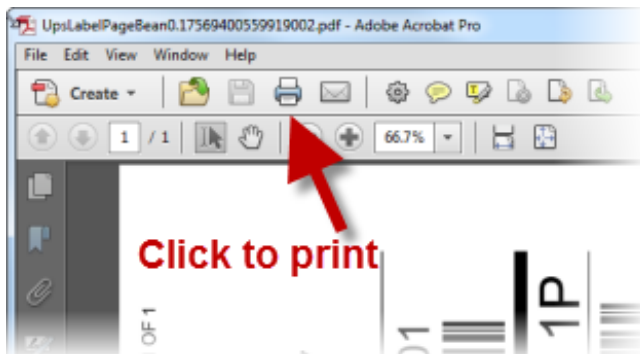


Shipping Label will generate and appear in a .pdf window

Step 6 Shipping label will generate and appear in a pdf window



Step 7 Click printer icon to print label(s)



How to Use VitalChek Product Suite

20 How to Void Shipping Labels

How to Void Shipping Labels

Shipping labels can be voided using the [Void Labels](#) tab

Users must have a role of [Clerk](#), [Supervisor](#) or [Manager](#) to be able to view and access [Shipping](#) functions

The screenshot shows the 'Shipping Labels' interface. At the top, there are four tabs: 'Generate Labels', 'Void Labels' (which is highlighted in blue), 'UPS Manifest', and 'Mail'. Below the tabs, there is an 'Order Number' input field, a 'Submit' button, and an 'Order Count 0' label. Below this, there is a table with columns: 'Order Number', 'Tracking Number/Status', 'Certificate Holder', 'Ship To', and 'Shipping Address'. At the bottom left, there is a 'Cancel' button.

Step 1 From the [Fulfillment](#) menu, select [Shipping Labels](#). [Generate Labels](#) tab is displayed.

The screenshot shows the 'Shipping Labels' interface with the 'Generate Labels' tab selected. The 'Order Number' input field is empty. The 'Order Count' is 0. The table below is empty.

Step 2 Click [Void Labels](#) tab. Labels can only be voided *the day the label was generated, prior to the manifest being created*.

The screenshot shows the 'Shipping Labels' interface with the 'Void Labels' tab selected. The 'Order Number' input field is empty. The 'Order Count' is 0. The table below is empty.

Step 3 Type the [Order Number](#) and click [Submit](#) button

The screenshot shows the 'Shipping Labels' interface with the 'Void Labels' tab selected. The 'Order Number' input field contains the text '13004991'. The 'Submit' button is visible. The table below is empty.

Step 4 Order is displayed in the table. Click check box to include order

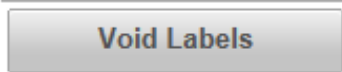
The screenshot shows the 'Shipping Labels' interface with the 'Void Labels' tab selected. The 'Order Number' input field contains the text '13004991'. The 'Order Count' is 1. The table below has one row with the following data:

	Order Number	Tracking Number/Status	Certificate Holder	Ship To	Shipping Address
<input checked="" type="checkbox"/>	13004991	1Z1234562910068168	test testing	test testing	12 Any St

At the bottom, there are 'Void Labels' and 'Cancel' buttons.

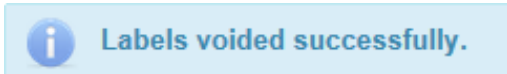
Step Click Void Labels button

6



Step Labels voided successfully message appears

7



21 How to Print a Detail Report with Manifest

How to Print a Detail Report with a UPS Manifest

The User can generate and print a **Detail Report** with a **UPS Manifest** from the **UPS Manifest** tab.

Users must have a role of **Clerk**, **Supervisor** or **Manager** to be able to view and access **Shipping** functions.

The screenshot shows the 'Shipping Labels' interface. At the top, there is a header 'Shipping Labels' and a row of four tabs: 'Generate Labels', 'Void Labels', 'UPS Manifest', and 'Mail'. The 'UPS Manifest' tab is currently selected and highlighted in blue. Below the tabs, there are three radio button options: 'Print Detail Report w/Manifest' (unchecked), 'Generate New Manifest' (checked), and 'Reprint Previous Manifest' (unchecked). At the bottom right of the interface is a large 'Generate' button.

Step 1 From the **Fulfillment** menu, select **Shipping Labels**. **Generate Labels** tab is displayed

The screenshot shows the 'Shipping Labels' interface with the 'Generate Labels' tab selected. Below the tabs, there is a search area with an 'Order Number' input field, a 'Submit' button, and an 'Order Count 0' indicator. Below this is a table with columns: 'Order Number', 'Tracking Number/Status', 'Certificate Holder', 'Ship To', and 'Shipping Address'. At the bottom left, there is a 'Clear' button.

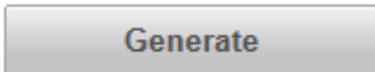
Step 2 Click **UPS Manifest** tab. **Generate New Manifest** screen displays with **Generate New Manifest** button pre-selected

The screenshot shows the 'Shipping Labels' interface with the 'UPS Manifest' tab selected. Below the tabs, there are three radio button options: 'Print Detail Report w/Manifest' (unchecked), 'Generate New Manifest' (checked), and 'Reprint Previous Manifest' (unchecked). At the bottom right of the interface is a large 'Generate' button.

Step 3 Check **Print UPS Detail Report w/Manifest**

Print Detail Report w/Manifest
 Generate New Manifest
 Reprint Previous Manifest

Step 4 Click **Generate** button





Step 5 Manifest/Detail Reports window displays

UPS Manifest Mail

Print Detail Report w/Manifest
 Generate New Manifest
 Reprint Previous Manifest

Manifest / Detail Reports

 Manifest
 Detail Report

Click image icon to view report

Step 6 **Detail Shipping Report** displays in .pdf



Step 7 Click printer icon to print



Step 8 Email notification is sent to customer order with UPS tracking information.

Note - if the manifest is not created, email will be automatically sent to the

How to Use VitalChek Product Suite

customer the evening the order was batched.

VitalChek Shipping Notification

Thank you for choosing VitalChek. The following message concerns your order from Arlington Vital Records Bureau. Your request has been processed and is being shipped via UPS as detailed below.

Order Number: 13002555 PIN: 511789					
Item	Record Ordered	Qty	Price	Extra Copies	Total
1	Birth / Statewide (Raised Seal) : test test	1	\$23.00	\$0.0	\$23.00
Agency Expedite Fee:					\$0.0
Processing:					\$10.00
Shipping:					\$18.00
Tax:					\$0.0
Total:					\$51.00

Your order has been assigned a UPS tracking number of 1Z1234561310029024. You may view the status of your package on the UPS website: [Click here for UPS Shipping Status.](#)

If you have any additional questions or would like to e-mail VitalChek about this order, please visit <https://VitalChek-solutions.custhelp.com>

Please do not reply to this e-mail as it is generated automatically and replies are not monitored.

22 How to Generate a New UPS Manifest

How to Generate a New UPS Manifest

The User can generate and print a **UPS Manifest** from the **UPS Manifest** tab.

Users must have a role of **Clerk**, **Supervisor** or **Manager** to be able to view and access **Shipping** functions.

When a manifest is created, an email is sent, notifying the customer their order has been shipped.

The screenshot shows a web interface titled "Shipping Labels". Below the title are four tabs: "Generate Labels", "Void Labels", "UPS Manifest", and "Mail". The "UPS Manifest" tab is currently selected and highlighted in blue. Below the tabs, there are three radio button options: "Print Detail Report w/Manifest" (unchecked), "Generate New Manifest" (checked), and "Reprint Previous Manifest" (unchecked). At the bottom right of this section is a "Generate" button.

Step 1 From the **Fulfillment** menu, select **Shipping Labels**. **Generate Labels** tab is displayed.

The screenshot shows the "Shipping Labels" interface with the "Generate Labels" tab selected. Below the tabs, there is an "Order Number" input field and a "Submit" button. To the right of the "Submit" button, it says "Order Count 0". Below these elements is a table with five columns: "Order Number", "Tracking Number/Status", "Certificate Holder", "Ship To", and "Shipping Address". At the bottom left of the table area is a "Clear" button.

Step 2 Click **UPS Manifest** tab. **Generate New Manifest** screen displays and **Generate New Manifest** button is pre-selected.

How to Use VitalChek Product Suite

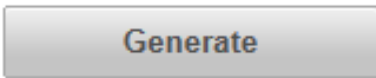
Shipping Labels

Generate Labels Void Labels **UPS Manifest** Mail

Print Detail Report w/Manifest
 Generate New Manifest
 Reprint Previous Manifest

Generate

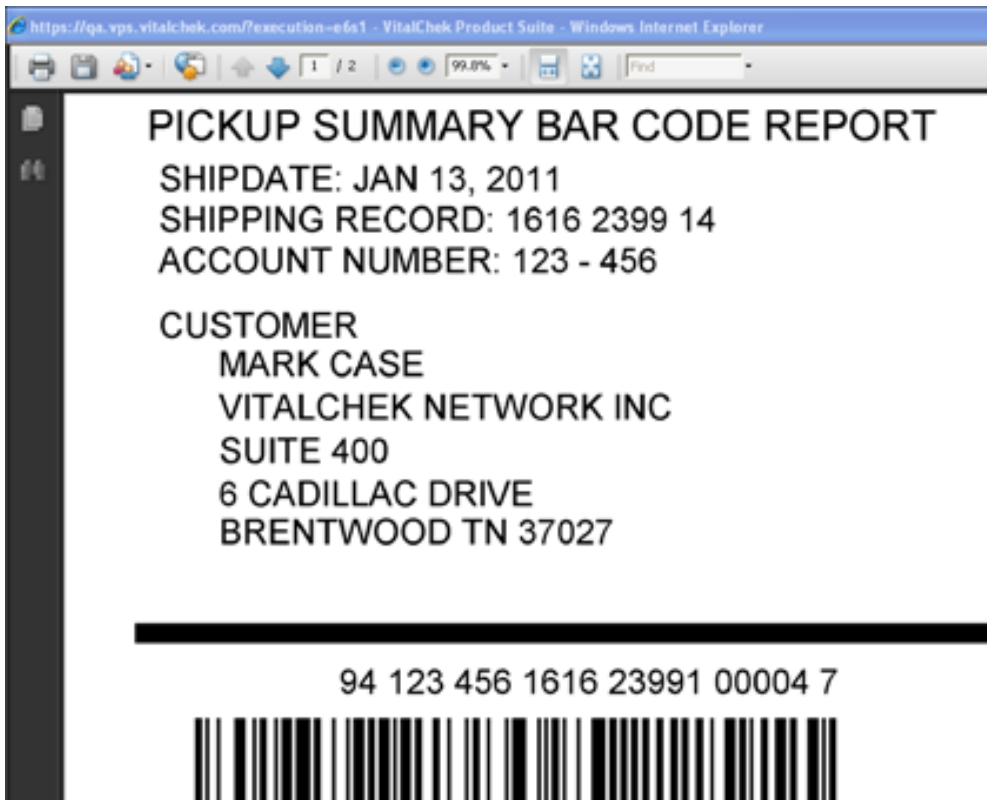
Step 3 Click **Generate** button



Step 4 **Manifest/Detail Reports** box displays



Step 5 Manifest Report displays in .pdf



Step 6 Click printer icon to print



Step 7 Email notification is sent to customer order with UPS tracking information.

Note - if the manifest is not created, email will be automatically sent to the customer the evening the order was batched.

VitalChek Shipping Notification

Thank you for choosing VitalChek. The following message concerns your order from Arlington Vital Records Bureau. Your request has been processed and is being shipped via UPS as detailed below.

Order Number: 13002555 PIN: 511789					
Item	Record Ordered	Qty	Price	Extra Copies	Total
1	Birth / Statewide (Raised Seal) : test test	1	\$23.00	\$0.0	\$23.00
Agency Expedite Fee:					\$0.0
Processing:					\$10.00
Shipping:					\$18.00
Tax:					\$0.0
Total:					\$51.00

Your order has been assigned a UPS tracking number of 1Z1234561310029024. You may view the status of your package on the UPS website: [Click here for UPS Shipping Status.](#)

If you have any additional questions or would like to e-mail VitalChek about this order, please visit <https://VitalChek-solutions.custhelp.com>

Please do not reply to this e-mail as it is generated automatically and replies are not monitored.

23 How to Reprint a Previous UPS Manifest

How to Reprint a Previous UPS Manifest

The User can generate and print a [Previous UPS Manifest](#) from the [UPS Manifest](#) tab

Users must have a role of [Clerk](#), [Supervisor](#) or [Manager](#) to be able to view and access [Shipping](#) functions

The screenshot shows the 'Shipping Labels' interface. At the top, there is a header 'Shipping Labels' and a row of tabs: 'Generate Labels', 'Void Labels', 'UPS Manifest', and 'Mail'. The 'UPS Manifest' tab is currently selected. Below the tabs, there are three radio button options: 'Print Detail Report w/Manifest' (unchecked), 'Generate New Manifest' (checked), and 'Reprint Previous Manifest' (unchecked). At the bottom right, there is a 'Generate' button.

Step 1 From the [Fulfillment](#) menu, select [Shipping Labels](#). [Generate Labels](#) tab is displayed.

The screenshot shows the 'Shipping Labels' interface with the 'Generate Labels' tab selected. Below the tabs, there is an 'Order Number' input field, a 'Submit' button, and an 'Order Count 0' label. Below this, there is a table with columns: 'Order Number', 'Tracking Number/Status', 'Certificate Holder', 'Ship To', and 'Shipping Address'. At the bottom left, there is a 'Clear' button.

Step 2 Click [UPS Manifest](#) tab. [Generate New Manifest](#) screen displays with [Generate New Manifest](#) button pre-selected.

The screenshot shows the 'Shipping Labels' interface with the 'UPS Manifest' tab selected. Below the tabs, there are three radio button options: 'Print Detail Report w/Manifest' (unchecked), 'Generate New Manifest' (checked), and 'Reprint Previous Manifest' (unchecked). At the bottom right, there is a 'Generate' button.

Step Check [Reprint Previous Manifest](#) button

3



UPS Manifest Mail

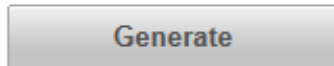
Print Detail Report w/Manifest

Generate New Manifest

Reprint Previous Manifest

Step 4 Click **Generate** button

4

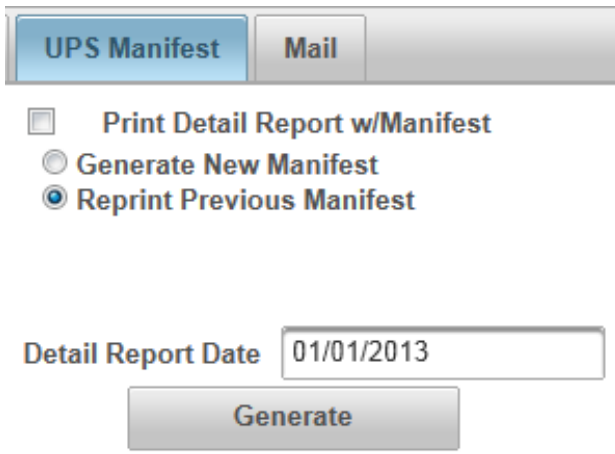


Generate

Step 5 **Reprint Previous** Manifest box displays defaulted to current date.

5

Enter a date to for which to reprint the manifest for or use the calendar to select a date.



UPS Manifest Mail

Print Detail Report w/Manifest

Generate New Manifest

Reprint Previous Manifest

Detail Report Date 01/01/2013

Generate

Step 6 **Manifest/Detail Reports** box is displayed

6



Manifest / Detail Reports

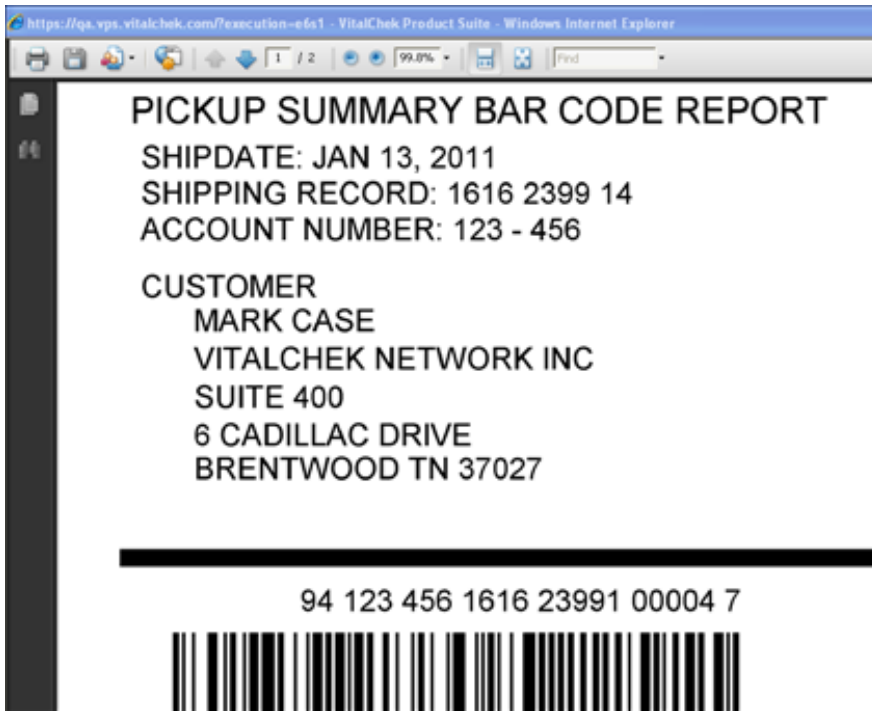
 Manifest

Click image icon to view Manifest

Step Manifest Report displays in .pdf

How to Use VitalChek Product Suite

7




https://qs.vps.vitalchek.com/execution-e6s1 - VitalChek Product Suite - Windows Internet Explorer

PICKUP SUMMARY BAR CODE REPORT
SHIPDATE: JAN 13, 2011
SHIPPING RECORD: 1616 2399 14
ACCOUNT NUMBER: 123 - 456

CUSTOMER
MARK CASE
VITALCHEK NETWORK INC
SUITE 400
6 CADILLAC DRIVE
BRENTWOOD TN 37027

94 123 456 1616 23991 00004 7



Step 8 Click printer icon to print



24 How to Process Regular Mail

How to Process Regular Mail

Regular mail orders (United States Postal Service/USPS) are processed through the **Mail** tab.

Users must have a role of **Clerk**, **Supervisor** or **Manager** to be able to view and access **Shipping** functions.

The screenshot shows the 'Shipping Labels' interface. At the top, there are four tabs: 'Generate Labels', 'Void Labels', 'UPS Manifest', and 'Mail'. The 'Mail' tab is currently selected and highlighted in blue. Below the tabs, there is a form with an 'Order Number' input field and a 'Submit' button. To the right of the 'Submit' button, it says 'Order Count 0'. Below this, there is a table with columns: 'Order Number', 'Certificate Holder', 'Ship To', and 'Shipping Address'. At the bottom left, there is a 'Clear' button.

Step 1 From the **Fulfillment** menu, select **Shipping Labels**. **Generate Labels** tab is displayed.

The screenshot shows the 'Shipping Labels' interface. At the top, there are four tabs: 'Generate Labels', 'Void Labels', 'UPS Manifest', and 'Mail'. The 'Generate Labels' tab is currently selected and highlighted in blue. Below the tabs, there is a form with an 'Order Number' input field and a 'Submit' button. To the right of the 'Submit' button, it says 'Order Count 0'. Below this, there is a table with columns: 'Order Number', 'Tracking Number/Status', 'Certificate Holder', 'Ship To', and 'Shipping Address'. At the bottom left, there is a 'Clear' button.

Step 2 Click **Mail** tab to display **Mail** screen

The screenshot shows the 'Shipping Labels' interface. At the top, there are four tabs: 'Generate Labels', 'Void Labels', 'UPS Manifest', and 'Mail'. The 'Mail' tab is currently selected and highlighted in blue. Below the tabs, there is a form with an 'Order Number' input field and a 'Submit' button. To the right of the 'Submit' button, it says 'Order Count 0'. Below this, there is a table with columns: 'Order Number', 'Certificate Holder', 'Ship To', and 'Shipping Address'. At the bottom left, there is a 'Clear' button.

Step 3 Enter **Order Number**

The screenshot shows a close-up of the 'Order Number' input field. The text '13004991' is entered into the field. To the right of the input field is a 'Submit' button.

Step 4 Click **Submit** button

The screenshot shows a close-up of the 'Submit' button.

Step Order information is displayed

How to Use VitalChek Product Suite

5

	Order Number	Certificate Holder	Ship To	Shipping Address
<input checked="" type="checkbox"/>	13005248	test testing	test testing	12 any st

Step 6 Click **Update Mail Date(s)** button.

6

Step 7 Confirmation message appears

7



25 How to Manually Close Orders with ACH

How to Manually Close Orders with ACH

Access from the **Closeout** menu. Opens to the **Close Orders** screen and contains tabs for **Reprint Report**, and **Incomplete Close**

Users must have a role of **Manager** to be able to view and access **Closeout** functions

Note - The Closeout process submits each agencies closeout to a queue. The length of time to complete a closeout may vary depending on the number of closeouts in the queue.

Step From the **Closeout** menu, select **Perform End-of-Day**. **Close Orders** tab is displayed

How to Use VitalChek Product Suite

1

The screenshot shows the 'Perform End of Day' window. At the top, there are three tabs: 'Close Orders' (selected), 'Reprint Report', and 'Incomplete Closes'. Below the tabs is a 'Criteria' section with a table containing one row: 'Settlement Group' with a dropdown menu set to 'MV Transfer Payments'. Below the table are two buttons: 'Process Close' and 'Show Orders in Grid'. Below the 'Criteria' section is a 'Select Orders for Close' section with two columns: 'Orders to Close' and 'Orders to Exclude', with navigation arrows between them.

Step 2 Select **Criteria** to close, or proceed to Step 3 to include all available criteria in the closeout

This screenshot is identical to the previous one, but a red arrow points to the 'Criteria' section, specifically to the 'Settlement Group' dropdown menu.





Step 3 Click **Show Orders in Grid** button

This screenshot is identical to the previous ones, but a red arrow points to the 'Show Orders in Grid' button.

Step 4 Available orders to close will display in **Orders to Close** table

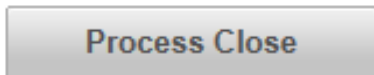


Note - To exclude order(s) from the close:

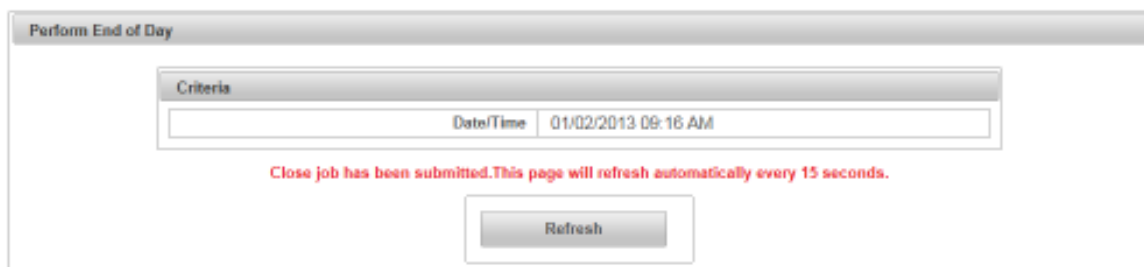
1. Click to highlight order in **Orders to Close** table
2. Click **Exclude** button  (or click **Exclude All** button  to exclude all orders from the close process). To move orders back and include in the close, click the **Include** button  (or **Include All** button  to include all orders in the close)
3. Order(s) will move to the **Orders to Exclude** table and will not be included in the close

Note - To move multiple orders - click & hold the Control button while clicking the orders to be moved; this will allow the user to select multiple orders at one time

Step 5 Click **Process Close** button

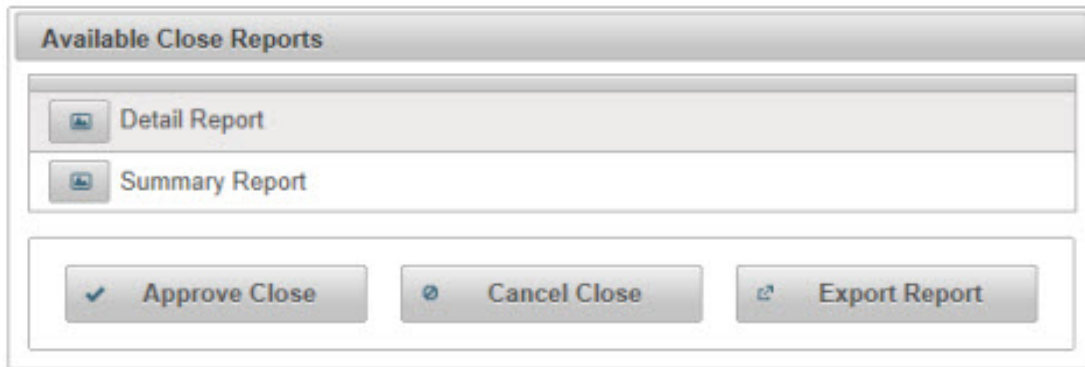


Step 6 Close job report screen appears while close is processing



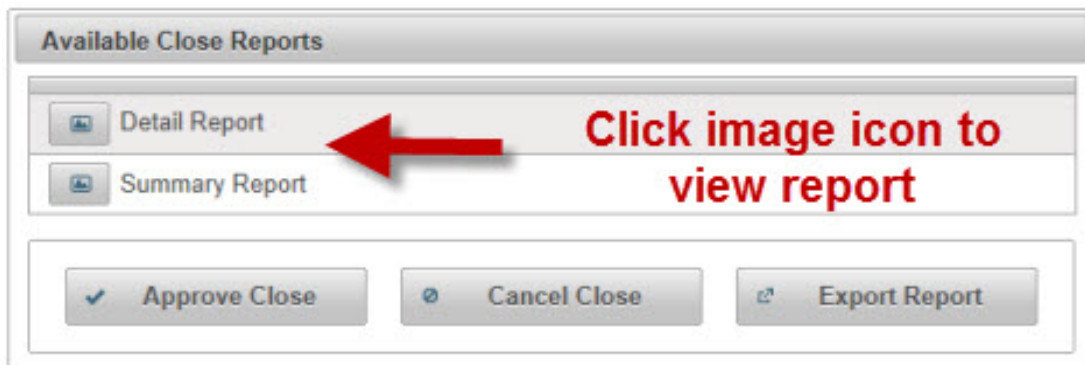
How to Use VitalChek Product Suite

Step 7 **Available Close Reports** screen appears when reports have been generated



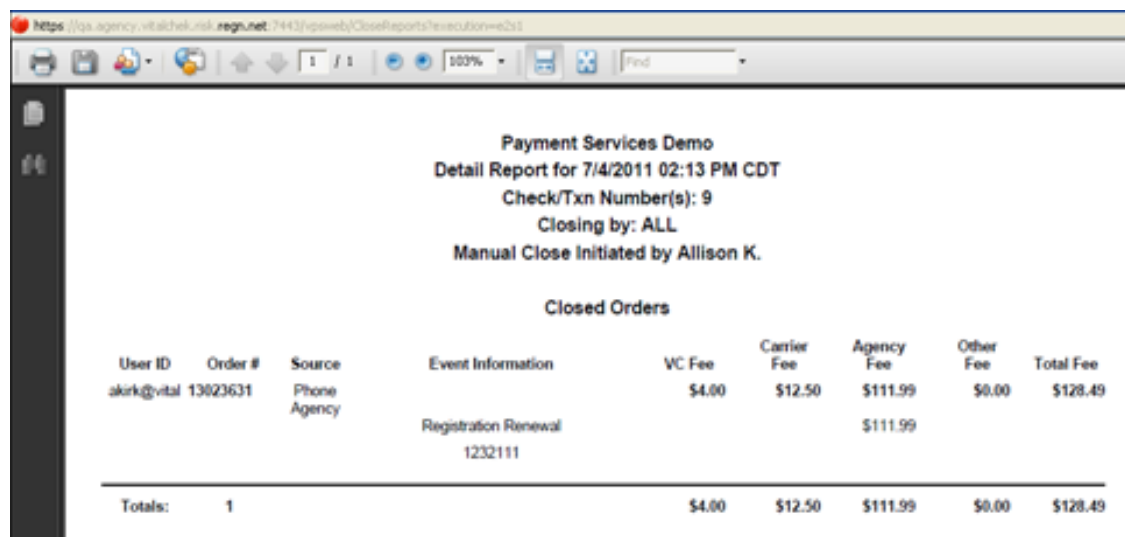
Note - Click the **Export Report** button to export to an Excel file

Step 8 Click **Report** image icon to view report required



Selected report appears in a .pdf window. Reports can be printed by clicking the printer icon.

Detail Report:



Payment Services Demo
Detail Report for 7/4/2011 02:13 PM CDT
Check/Txn Number(s): 9
Closing by: ALL
Manual Close Initiated by Allison K.

Closed Orders

User ID	Order #	Source	Event Information	VC Fee	Carrier Fee	Agency Fee	Other Fee	Total Fee	
akirk@vital	13023631	Phone Agency	Registration Renewal 1232111	\$4.00	\$12.50	\$111.99	\$0.00	\$128.49	
Totals:				1	\$4.00	\$12.50	\$111.99	\$0.00	\$128.49

Summary Report:

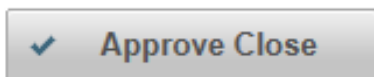
Payment Services Demo
 Summary Report for 7/4/2011 02:13 PM CDT
 Check/Txn Number(s): 9
 Closing by: ALL
 Manual Close Initiated by Allison K.

Product Type	Quantity	Agency Fee	Other Agency Fee	Total
Registration Renewal	1	\$111.99	\$0.00	\$111.99
Totals:	1	\$111.99	\$0.00	\$111.99

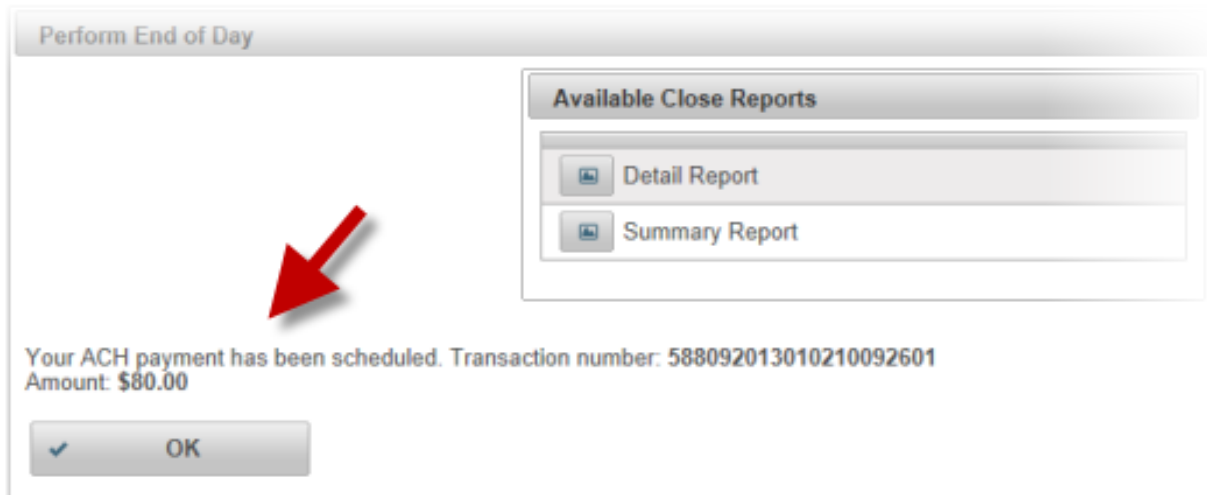
Order Source	Quantity	Agency Fee	Other Agency Fee	Total Agency Fee
Agency Staff				
akirk@vitalchek.com	1	\$111.99	\$0.00	\$111.99
Order Total:	1	\$111.99	\$0.00	\$111.99
Totals:	1	\$111.99	\$0.00	\$111.99

Total Agency Fee: \$111.99

Step 9 Click **Approve Close** button to continue processing the close



Step 10 Close process is complete and payment confirmation displays



Step 11 Click **OK** button to confirm close and return to **Close Orders** screen

26 How to Close Orders with a Check

How to Manually Close Orders with a Check

Access from the **Closeout** menu. Opens to the **Close Orders** screen and contains tabs for **Reprint Report**, and **Incomplete Close**

Users must have a role of **Manager** to be able to view and access **Closeout** functions

Note - The Closeout process submits each agencies closeout to a queue. The length of time to complete a closeout may vary depending on the number of closeouts in the queue.

The screenshot displays the 'Perform End of Day' interface in the VitalChek system. At the top, the LexisNexis Payment Solutions logo is visible, along with search and user fields. The navigation menu includes 'Orders', 'Fulfillment', 'Closeout', 'Reports', and 'Administration'. The 'Perform End of Day' window has three tabs: 'Close Orders' (selected), 'Reprint Report', and 'Incomplete Closes'. A 'Check Number' input field is present. Below this is a 'Criteria' section with four dropdown menus: 'User' (listing Supervisor, akirk@vitalchek.com, imason@vitalchek.com, imclerk, imsupervisor), 'Product' (listing Traffic Citation, Court Fine, Water Bill, Drivers License Renewal, Registration Renewal), 'Order source' (listing All, Phone, Web, Mail, Fax, PDS, etc.), and 'Terminal' (listing 100, 70540001000, 70540002000, 70540003001, 70540004001, 70540000000, etc.). 'Process Close' and 'Show Orders in Grid' buttons are located below the criteria. At the bottom, the 'Select Orders for Close' section is partially visible, showing 'Orders to Close' and 'Orders to Exclude' columns.

Step From the **Closeout** menu, select **Perform End-of-Day. Close Orders** tab is displayed

1

LexisNexis® Payment Solutions

Quick Search Client ID [skirk@vitalchek.com](#)

Orders > Fulfillment > Closeout > Reports > Administration > Payment Services Demo (34031)

Perform End of Day

Close Orders Reprint Report Incomplete Closes

Check Number

Criteria			
User	All Supervisor1 skirk@vitalchek.com mason@vitalchek.com lmclerk lmsupervisor	Product	All Traffic Citation Court Fine Water Bill Drivers License Renewal Registration Renewal
Order source	All Phone Web Mail Fax POB Lun	Terminal	100 70540001002 70540002003 70540003201 70540004301 70540005002

Process Close Show Orders in Grid

Select Orders for Close

Orders to Close	Orders to Exclude

Step 2 Select **Criteria** to close, or proceed to Step 3 to include all available criteria in the closeout

Perform End of Day

Close Orders Reprint Report Incomplete Closes

Check Number

Criteria			
User	All Supervisor1 skirk@vitalchek.com mason@vitalchek.com lmclerk lmsupervisor	Product	All Traffic Citation Court Fine Water Bill Drivers License Renewal Registration Renewal
Order source	All Phone Web Mail Fax POB Lun	Terminal	100 70540001002 70540002003 70540003201 70540004301 70540005002

Process Close Show Orders in Grid

Select Orders for Close

Step 3 Enter **check number** from the pre-printed VitalChek check paper

Close Orders Reprint Report Incomplete Closes

Check Number

Process Close Show Orders in Grid

How to Use VitalChek Product Suite

Step 4 Click **Show Orders in Grid** button

Perform End of Day

Close Orders Reprint Report Incomplete Closes

Check Number

Criteria

User	All Supervisor skirk@vitalchek.com mason@vitalchek.com msupervisor	Product	All Traffic Citation Court Fine Water Bill Drivers License Renewal Registration Renewal
Order source	All Phone Web Mail Fax PDS	Terminal	100 70540001002 70540002003 70540003201 70540004301 70540000002

Process Close Show Orders in Grid

Select Orders for Close

Orders to Close Orders to Exclude





Step 5 Available orders to close will display in **Orders to Close** table

Select Orders for Close

Orders to Close		Orders to Exclude	
13006201	01/17/2013 MF Transfer ... wnc133 ... 21.00		
13006208	01/17/2013 MF Transfer ... wnc133 ... 21.00		

Available orders to close

Note - To exclude order(s) from the close:

1. Click to highlight order in **Orders to Close** table
2. Click **Exclude** button  (or click **Exclude All** button  to exclude all orders from the close process). To move orders back and include in the close, click the **Include** button  (or **Include All** button  to include all orders in the close)
3. Order(s) will move to the **Orders to Exclude** table and will not be included in the close

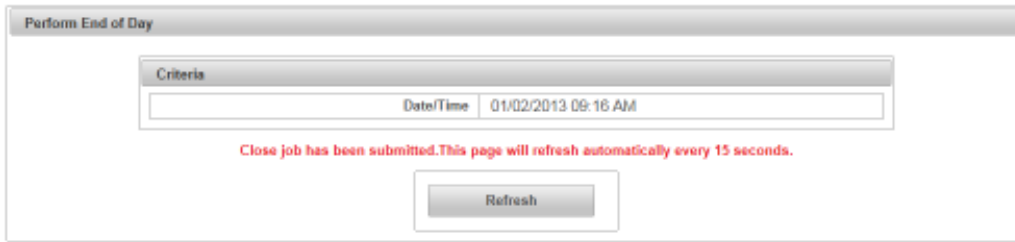
Note - To move multiple orders - click & hold the Control button while clicking the orders to be moved; this will allow the user to select multiple orders at one time

Step 6 Click **Process Close** button

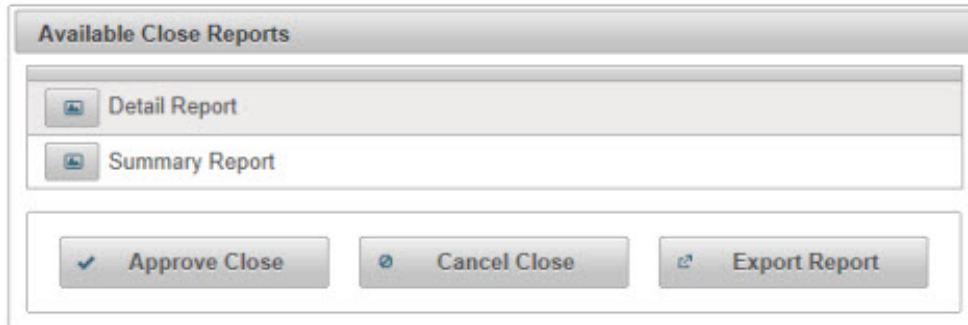
Process Close

Step Close job report screen appears while close is processing; click to manually refresh

7

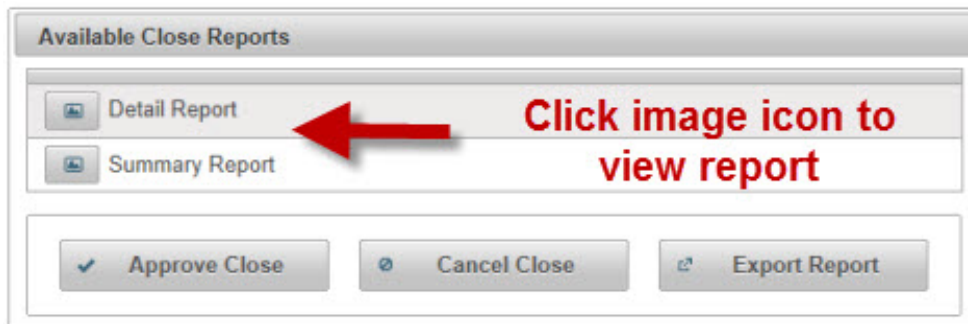


Step 8 **Available Close Reports** screen appears when reports have been generated



Note - Click the **Export Report** button to export to an Excel file

Step 9 Click **Report** image icon to view report required



Selected report appears in a .pdf window. Reports can be printed by clicking the printer icon.

Detail Report:

https://ps.agency.vitalchek.net/regu.net:7443/psweb/CloseReports/execution=213

Payment Services Demo
 Detail Report for 7/4/2011 02:13 PM CDT
 Check/Txn Number(s): 9
 Closing by: ALL
 Manual Close Initiated by Allison K.

Closed Orders

User ID	Order #	Source	Event Information	VC Fee	Carrier Fee	Agency Fee	Other Fee	Total Fee	
akirk@vital	13023631	Phone Agency	Registration Renewal 1232111	\$4.00	\$12.50	\$111.99	\$0.00	\$128.49	
Totals:				1	\$4.00	\$12.50	\$111.99	\$0.00	\$128.49

How to Use VitalChek Product Suite

Summary Report:

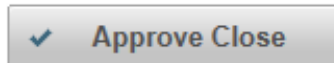
Payment Services Demo
Summary Report for 7/4/2011 02:13 PM CDT
Check/Txn Number(s): 9
Closing by: ALL
Manual Close Initiated by Allison K.

Product Type	Quantity	Agency Fee	Other Agency Fee	Total
Registration Renewal	1	\$111.99	\$0.00	\$111.99
Totals:	1	\$111.99	\$0.00	\$111.99

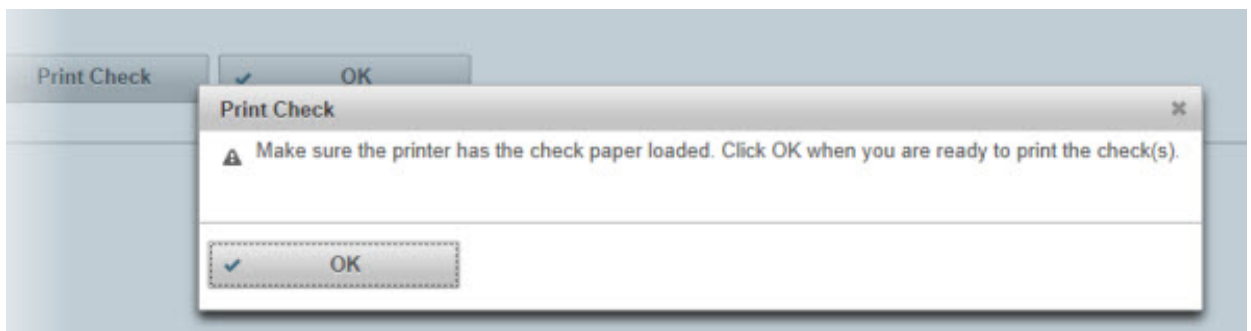
Order Source	Quantity	Agency Fee	Other Agency Fee	Total Agency Fee
Agency Staff				
akirk@vitalchek.com	1	\$111.99	\$0.00	\$111.99
Order Total:	1	\$111.99	\$0.00	\$111.99
Totals:	1	\$111.99	\$0.00	\$111.99

Total Agency Fee: \$111.99

Step 9 Click **Approve Close** button to continue processing the close

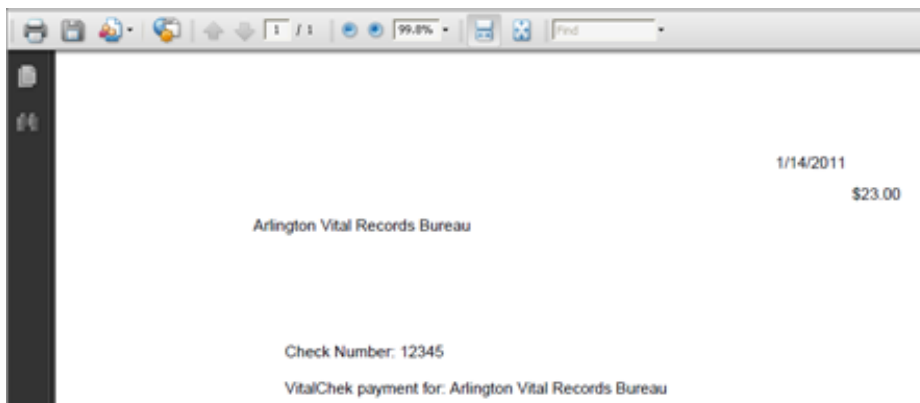


Step 10 Check paper confirmation message appears. Make sure the printer has pre-printed check paper with the number entered in the **Check Number** box



Step 11 Click **OK** button

Step 12 Check displays in a .pdf



Step 13 Click printer icon to print check on check paper

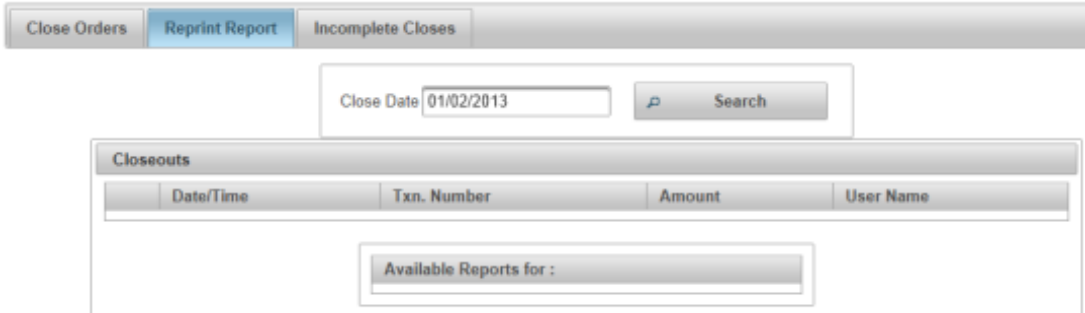


27 How to Reprint a Report

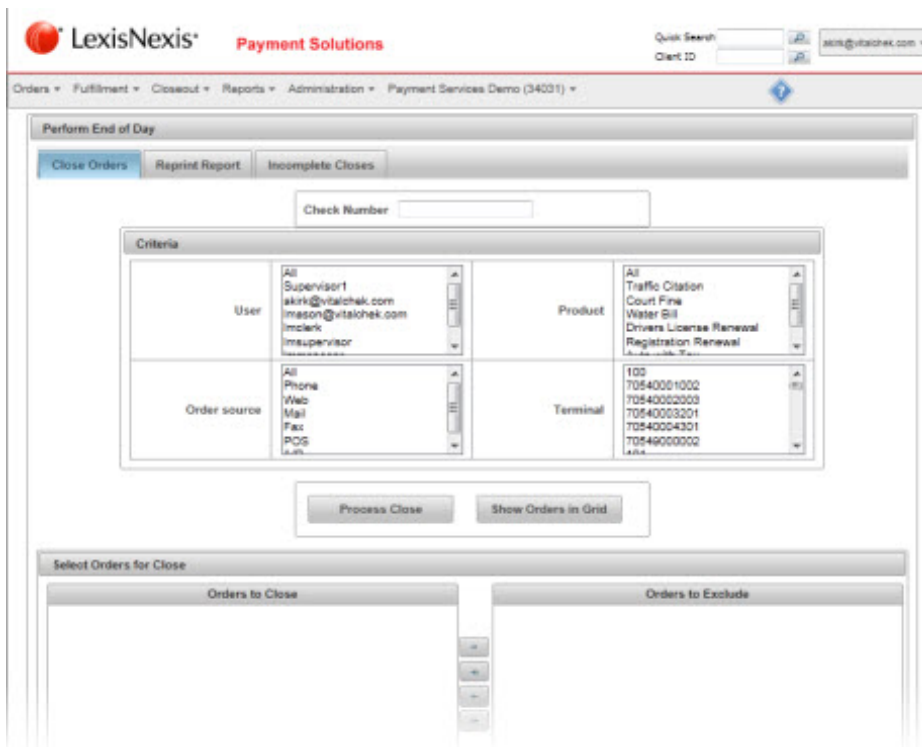
How to Reprint a Close Report

Close reports can be reprinted from the [Reprint Report](#) tab.

Users must have a role of [Manager](#) to be able to view and access [Closeout](#) functions



Step 1 From the [Closeout](#) menu, select [Perform End-of-Day](#). [Close Orders](#) tab is displayed



Step Select [Reprint Report](#) tab to display [Reprint Report](#) screen

2

Step Enter Close Date or select date from calendar icon

3

Step Click **Search** button

4

Step Available closeouts from selected date are displayed

5

	Date/Time	Txn. Number	Amount	User Name
▶	01/02/2013 08:09:26 AM PST	588092013010210092601	\$80.00	Allison
▶	01/02/2013 09:16:40 AM PST	588112013010211164001	\$40.00	Allison

Step Click on Date/Time line to select closeout

6

	Date/Time	Txn. Number	Amount	User Name
▶	01/02/2013 08:09:26 AM PST	588092013010210092601	\$80.00	Allison
▶	01/02/2013 09:16:40 AM PST	588112013010211164001	\$40.00	Allison

Step Available Reports for selected date are displayed, Click on required report to display in .pdf. Click **Export Report** to export to an Excel file

7

How to Use VitalChek Product Suite

Closeouts

	Date/Time	Txn. Number	Amount	User Name
	02/04/2014 01:39:49 PM CST	56789	\$20.00	Allison
	02/04/2014 01:50:37 PM CST	56774	\$25.00	Allison
	02/04/2014 02:21:42 PM CST	556647	\$10.00	Allison

Click image to display report

Available Reports for : 04 Feb 2014 13:39:49 CST

- Detail Report
- Summary Report

Export Report

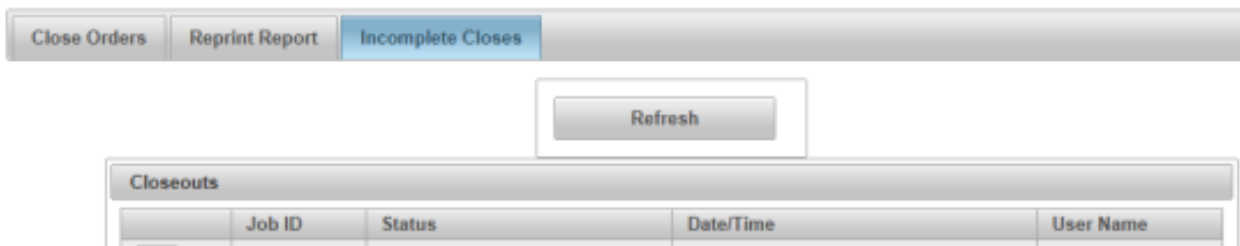
28 How to Process an Incomplete Close

How to Process an Incomplete Close

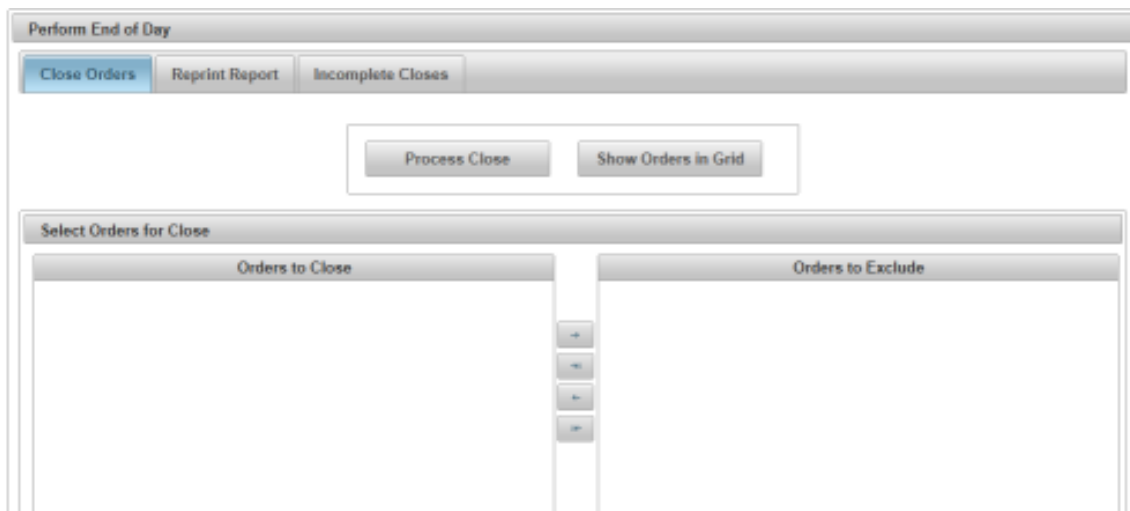
Closes that were interrupted during the closeout process, or **Incomplete Closes**, can be completed from the **Incomplete Closes** tab.

Users must have a role of **Manager** to be able to view and access **Closeout** functions.

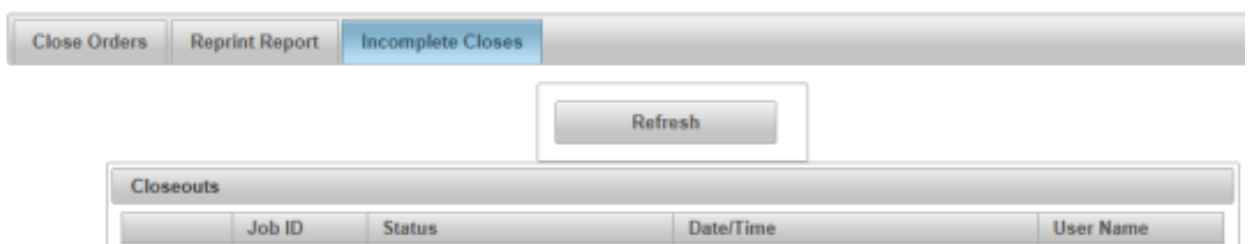
Note - The Closeout process submits each agencies closeout to a queue. The length of time to complete a closeout may vary depending on the number of closeouts in the queue.



Step 1 From the **Closeout** menu, select **Perform End-of-Day. Close Orders** tab is displayed

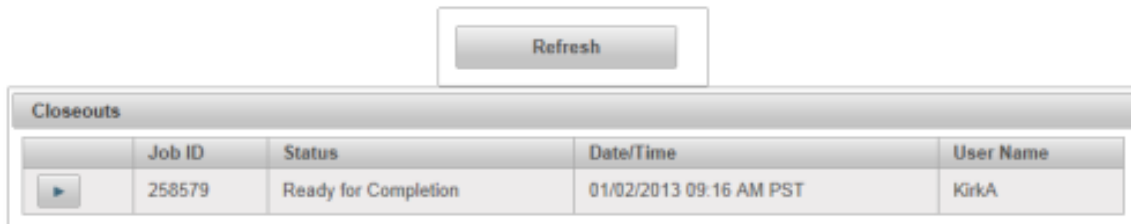


Step 2 Click **Incomplete Closes** tab

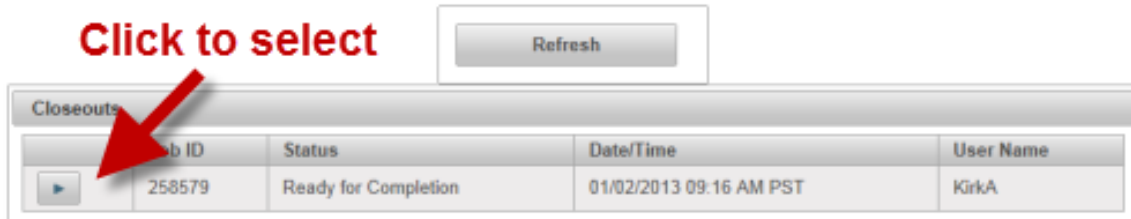


How to Use VitalChek Product Suite

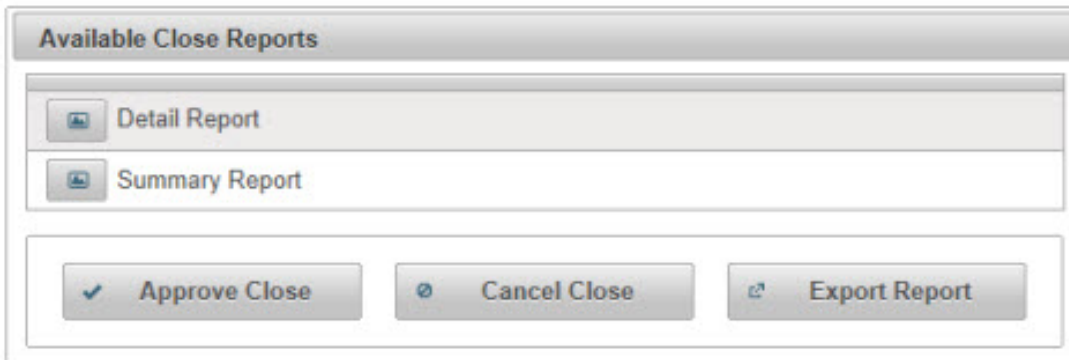
Step 3 Click [Refresh](#) button to display incomplete closes in the **Closeout** table



Step 4 Click the [arrow](#) link to select and complete the close

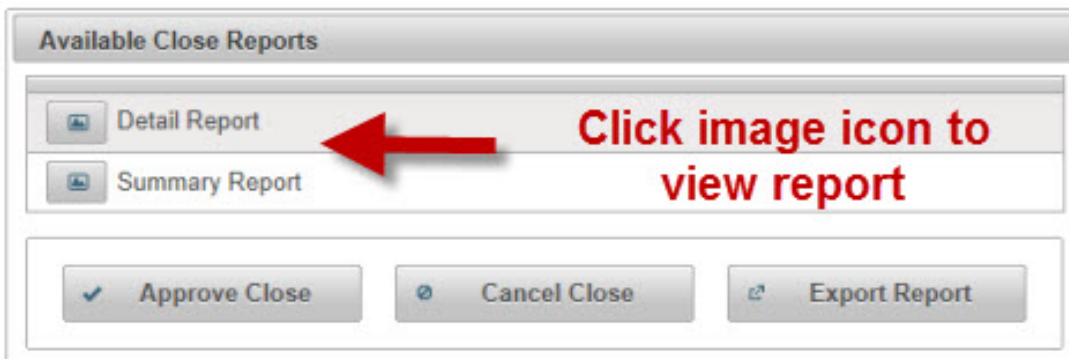


Step 5 The **Available Reports** screen is displayed with payment information



Note - Click the **Export Report** button to export to an Excel file

Step 6 Click [Report](#) link to view report required



Selected report appears in a .pdf window. Reports can be printed by clicking the printer icon.

Detail Report:

https://qa.agency.vitalchek.us/regu.net:7442/vpweb/CloseReports/executionweb23

Payment Services Demo
 Detail Report for 7/4/2011 02:13 PM CDT
 Check/Txn Number(s): 9
 Closing by: ALL
 Manual Close Initiated by Allison K.

Closed Orders

User ID	Order #	Source	Event Information	VC Fee	Carrier Fee	Agency Fee	Other Fee	Total Fee	
akirk@vital	13023631	Phone Agency	Registration Renewal 1232111	\$4.00	\$12.50	\$111.99	\$0.00	\$128.49	
						\$111.99			
Totals:				1	\$4.00	\$12.50	\$111.99	\$0.00	\$128.49

Summary Report:

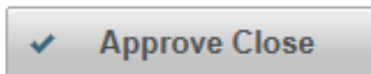
Payment Services Demo
 Summary Report for 7/4/2011 02:13 PM CDT
 Check/Txn Number(s): 9
 Closing by: ALL
 Manual Close Initiated by Allison K.

Product Type	Quantity	Agency Fee	Other Agency Fee	Total
Registration Renewal	1	\$111.99	\$0.00	\$111.99
Totals:	1	\$111.99	\$0.00	\$111.99

Order Source	Quantity	Agency Fee	Other Agency Fee	Total Agency Fee
Agency Staff				
akirk@vitalchek.com	1	\$111.99	\$0.00	\$111.99
Order Total:	1	\$111.99	\$0.00	\$111.99
Totals:	1	\$111.99	\$0.00	\$111.99

Total Agency Fee: \$111.99

Step 7 Click Approve Close to complete close process



Step 8 Payment information is displayed and closeout process is complete (ACH) or print check
Note - Agencies that close with a check, see How to Close Orders with a Check (Section 26) to complete closeout

29 How to Search for Users

How to Search for Users

VPS Users are located using the **User Maintenance** screen.

Users must have a role of **Administrator** to be able to view and access **Administration** functions.

The screenshot shows the 'User Maintenance' interface. It features a search form with the following elements:

- Input fields for 'First Name' and 'Last Name'.
- An 'Expired' checkbox.
- 'Search', 'Clear', and 'Add New User' buttons.
- A table header with columns: 'User Name', 'First Name', 'Last Name', 'Locked', 'Expired', and 'Last Login Date'.

Step 1 From the **Administration** menu, select **User Maintenance**. **User Maintenance** screen is displayed

This screenshot is identical to the one above, showing the 'User Maintenance' search form with its input fields and buttons.

Step 2 Enter (at least) first letter of **First Name** of User

First Name

Step 3 Enter (at least) first three letters of **Last Name** of User

Last Name

Step 4 Check **Expired** to **include** expired users in search or leave unchecked to **exclude** expired users.

Expired

Step 5 Click Search button

Step 6 Search result are displayed

The screenshot shows the search results table. A red arrow points to the 'User Name' cell of the first row, which contains the email address 'akirk@vitalchek.com'. A red text overlay reads 'Click link to display Edit User screen'.

User Name	First Name	Last Name	Locked	Expired	Last Login Date
akirk@vitalchek.com	Akshay	Kirk		<input type="checkbox"/>	11/02/2013

Step 7 **Edit User** screen displays

Edit User

User ID (email address) vpweb2.0@gmail.com

First Name training

Last Name vps

Start Date 12/28/2012

End Date 04/11/2013

New Password

Confirm Password

Locked

Expired

Pin

Roles Administrator Manager Supervisor Clerk

Agency

Available	Selected
Denton County Clerk Kentucky Vital Records Tri County Health Dept Washington State Center For Health Statistics	Arlington Vital Records Bureau

Save Cancel

30 How to Unlock Users

How to Unlock Users

Users that are locked out of VPS will have a check in the Locked box and will display in two locations:

- 1- User Search screen
- 2 - Edit User screen

User Search:

User Name	First Name	Last Name	Locked	Expired	Last Login Date
vpsweb2.0@gmail.com	training	vps	<input checked="" type="checkbox"/>	<input type="checkbox"/>	12/28/2012

Edit User:

The screenshot shows the 'Edit User' form with the following fields and values:

- User ID (email address): vpsweb2.0@gmail.com
- First Name: training
- Last Name: vps
- Start Date: 12/28/2012
- End Date: 04/11/2013
- New Password: (empty)
- Confirm Password: (empty)
- Locked: (indicated by a red arrow)
- Expired:
- Pin: (empty)
- Roles: Administrator, Manager, Supervisor, Clerk
- Agency: Available (Denton County Clerk, Kentucky Vital Records, Tri County Health Dept, Washington State Center For Health Statistics)

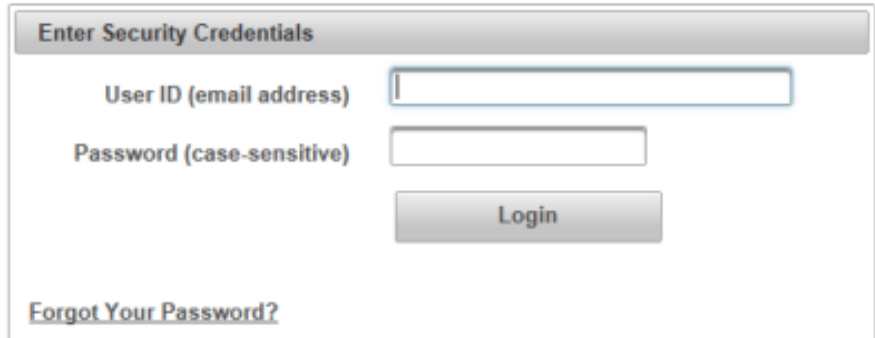
Steps to Unlock a User

Users must have a role of **Administrator** to be able to view and access **Administration** functions.

When a user reports that they have received a Locked message, such as the one below, the Administrator can unlock the user if appropriate.

 The user you attempted to authenticate is disabled, please contact support.

Locked box is checked in User Maintenance



VPS Version 2.0

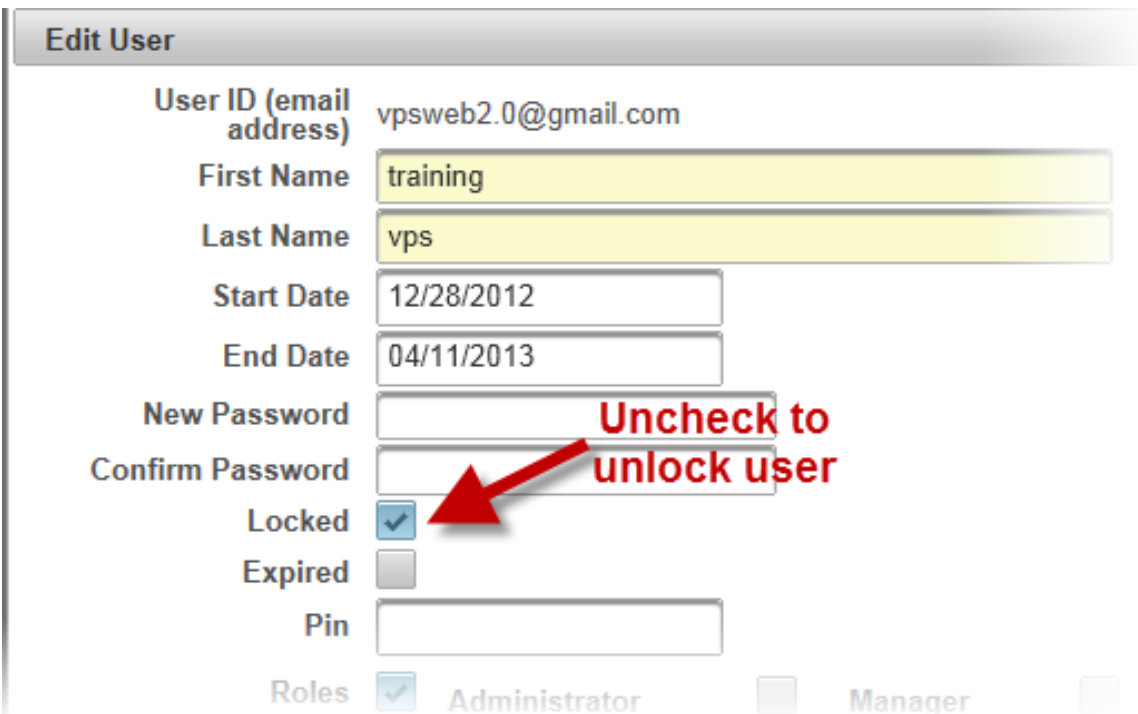
Step 1: Login as Administrator

Step 2: Select User Maintenance from the Administration menu option.

Step 3: Search for the user by first and last name.

Step 4: Select the user from the results grid.

Step 5: Click on the Locked check box to clear the check mark.



How to Use VitalChek Product Suite

Step 6: Save changes

Locked

Expired

Pin

Roles Administrator Manager Supervisor Clerk

Agency

Available	Selected
Denton County Clerk Kentucky Vital Records Tri County Health Dept Washington State Center For Health Statistics	Arlington Vital Records Bureau

Click to Save

Save Cancel

Step 7: View message at top left of User Maintenance screen to verify the change was saved successfully.

LexisNexis VitalChek Pro

Orders ▾ Fulfillment ▾ Closeout ▾ Dashboard ▾ Admin

i Saving User Information was successful.

User Maintenance

Change successful

First Name
Last Name

31 How to Add New Users

How to Add New Users

Add New User screen contains information on VPS **Users**. Required information is highlighted yellow.

Users must have a role of **Administrator** to be able to view and access **Administration** functions.

The screenshot shows the 'Add New User' form with the following fields and options:

- User ID (email address):
- First Name:
- Last Name:
- Start Date:
- End Date:
- Locked:
- Expired:
- Pin:
- Roles: Administrator, Manager, Supervisor, Clerk
- Agency:
 - Available: Arlington Vital Records Bureau, Denton County Clerk, Tri County Health Dept
 - Selected: (Empty)

Buttons: Save, Cancel

Step 1 From the **Administration** menu, select **User Maintenance**. **User Maintenance** screen is displayed

The screenshot shows the 'User Maintenance' screen with the following elements:

- Search fields: First Name, Last Name, Expired
- Buttons: Search, Clear, Add New User
- Table:

User Name	First Name	Last Name	Locked	Expired	Last Login Date

Step 2 Click **Add New User** button



Step **Add New User** screen is displayed. Required fields are highlighted yellow

How to Use VitalChek Product Suite

3

The screenshot shows the 'Add New User' form. It has the following fields and options:

- User ID (email address): [Text Input]
- First Name: [Text Input]
- Last Name: [Text Input]
- Start Date: 12/28/2012
- End Date: 12/31/2999
- Locked:
- Expired:
- Pin: [Text Input]
- Roles: Administrator, Manager, Supervisor, Clerk
- Agency: A list of available agencies (Arlington Vital Records Bureau, Denton County Clerk, Tri County Health Dept) and a 'Selected' list. Navigation arrows are between the lists.
- Buttons: Save, Cancel

Step 4 Enter **User ID**; must be a valid email address

4

User ID (email address) [Text Input]

Step 5 Enter User's **First Name**

5

First Name [Text Input]

Step 6 Enter User's **Last Name**

6

Last Name [Text Input]

*note - **Start Date** defaults to current date, if another End Date is required, click in date field or click on calendar icon to display the calendar. Click on required date to select.*

Start Date [Text Input: 12/28/2012]

*note - **End Date** defaults to Dec 31, 2999. If another End Date is required, Click in date field or click on calendar icon to display the calendar. Click on required date to select.*

End Date [Text Input: 12/31/2999]

Step 7 Enter a **PIN** number for users that will be operating a point of sale (POS) device. PIN must be 1 - 4 digits and unique; no other user in the agency may use the same number

Pin [Text Input]


Step Select a **Role** for the User by checking the box(es) next to the role. When choosing a role,


8 determine what functions the user will perform in the agency. A User may have an Administrator role along with *one* other role (Manager-Supervisor-Clerk).

- **Administrator** - Administers users for an assigned agency
- **Manager** - Agency Supervisor role plus performs End of Day
- **Supervisor** - Agency Clerk role plus void and issue credits
- **Clerk** - Enters, inquiries, modifies orders

Roles Administrator Manager Supervisor Clerk

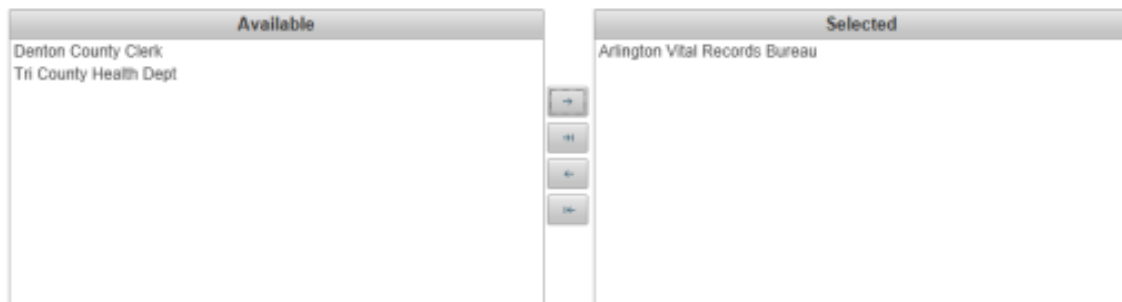
Step 9 Available Agencies are displayed in the **Available** table on the left side.

To add the User to an Agency, click Agency name to select it and click **Add** button  to move it to the right table.

To add to all Agencies displayed, click the **Add All**  button.



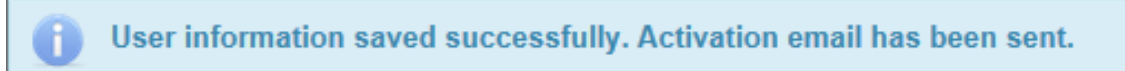
Step 10 Selected Agency will be displayed in the right table



Step 11 Click **Save** button



Step 12 Confirmation message that User is receiving an email to activate their user ID is displayed



32 How to Add Agencies to Users

How to Add Agencies to Users

Administrators can add Agencies to Users who need to access more than 1 Agency.

Users must have a role of **Administrator** to be able to view and access **Administration** functions.

The screenshot shows the 'Add New User' interface. It features several input fields: 'User ID (email address)', 'First Name', 'Last Name', 'Start Date' (pre-filled with 12/28/2012), 'End Date' (pre-filled with 12/31/2999), 'Locked', 'Expired', and 'Pin'. Below these are radio buttons for 'Roles': 'Administrator' (which is selected), 'Manager', 'Supervisor', and 'Clerk'. An 'Agency' section contains two panes: 'Available' and 'Selected'. The 'Available' pane lists 'Arlington Vital Records Bureau', 'Denton County Clerk', and 'Tri County Health Dept'. The 'Selected' pane is currently empty. At the bottom of the form are 'Save' and 'Cancel' buttons.

Step 1 From the **Administration** menu, select **User Maintenance**. **User Maintenance** screen is displayed

The screenshot shows the 'User Maintenance' screen. It includes input fields for 'First Name' and 'Last Name', an 'Expired' checkbox, and three buttons: 'Search', 'Clear', and 'Add New User'. Below these is a table with the following columns: 'User Name', 'First Name', 'Last Name', 'Locked', 'Expired', and 'Last Login Date'.

Step 2 Enter first initial of **First Name** and first 2 letters of **Last Name** (at least) to search for User

Step 3 Click **Search** button

A close-up of the 'Search' button, which features a magnifying glass icon to the left of the text 'Search'.

Step 4 User is displayed in search results, click on **User ID** link

A close-up of a search result. It shows the text 'User ID' above a blue, underlined link 'PuertoRicoUser'. A red arrow points from the right towards the link.

Step **Edit User** screen is displayed

5

Step 6 Available Agencies are displayed in left column; the Agencies User currently has access to are displayed in the right column

Step 7 Click on the Agency to highlight in the left column

Step 8 Click **Add** button to move agency to **Selected** table



*Note - to select all available Agencies, click **Add All** button*



Step 9 Selected Agencies are displayed in the right column

33 How to Reset a Forgotten Password

How to Reset a Forgotten Password

Upon entering VitalChek Product Suite, the User will be presented with a [Enter Security Credentials](#) login page

VPS Version 2.0

Step 1 To reset a forgotten password, Enter [User ID](#) (email address)


Step 2 Click the [Forgot Your Password?](#) link

Step 3 [Request Password Reset](#) screen will be displayed

Step 4 Enter [User ID](#) (email address) if not prepopulated from login page.\

Step 5 Click [Submit](#) button

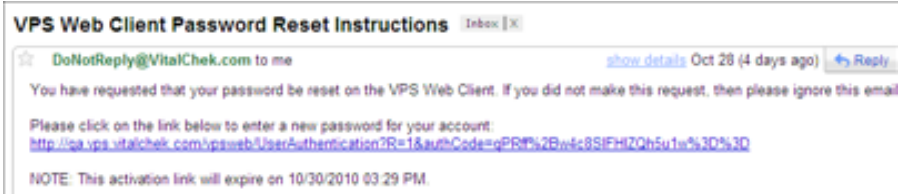
Step 6 Email confirmation message appears

 **An email will be sent to this address with password reset instructions.**

Step [VPS Password Reset Instructions](#) email is sent to User

How to Use VitalChek Product Suite

7



Step 8 Click link in the email to display the **Password Reset** page.

The screenshot shows a web form titled "Password Reset" with the following fields and elements:

- User Name:** vpsweb2.0@gmail.com
- Name:** training vps
- New Password:** [Empty text box]
- Confirm Password:** [Empty text box]
- Change Password:** [Submit button]
- Password Strength:** A horizontal bar indicator is positioned to the right of the "New Password" field.

Step 9 Enter a **New Password**

9

*Note: Password Strength indicator displays weak-good-strong based on password selection. See **How to Create a New Password (on-line documentation)** for Password Rules*

Step 10 Confirm **New Password**

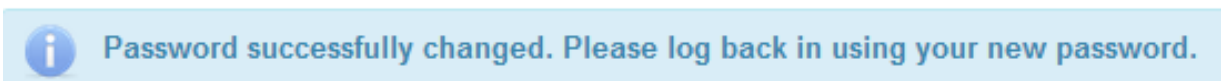
10

Step 11 Click **Change Password** button


11

Step 12 **Success** message appears confirming **Password Reset Complete**

12



Step 13 Enter **User ID** and new **Password** to login

 Password successfully changed. Please log back in using your new password.

Enter Security Credentials

User ID (email address)

Password (case-sensitive)

[Forgot Your Password?](#)

VPS Version 2.0

Step 14 Login to VPS using new password


34 How to Change an Expired Password

How to Change an Expired Password

Passwords expire every 90 days. If the password expiration date has passed, user will be prompted to enter the **User ID**, **Old Password** and **New Password** on the **Change Password** screen.



VitalChek Product Suite

 Your password is expired.


Change Password

Old Password

New Password

Confirm Password

- Step 1 Enter **User ID**
- Step 2 Enter **Old Password**
- Step 3 Enter a **New Password**
- Step 4 **Confirm Password**
- Step 5 Click **Change Password** button
- Step 6 User is returned to login screen to login with new password

 Password successfully changed. Please log back in using your new password.

Enter Security Credentials

User ID (email address)

Password (case-sensitive)

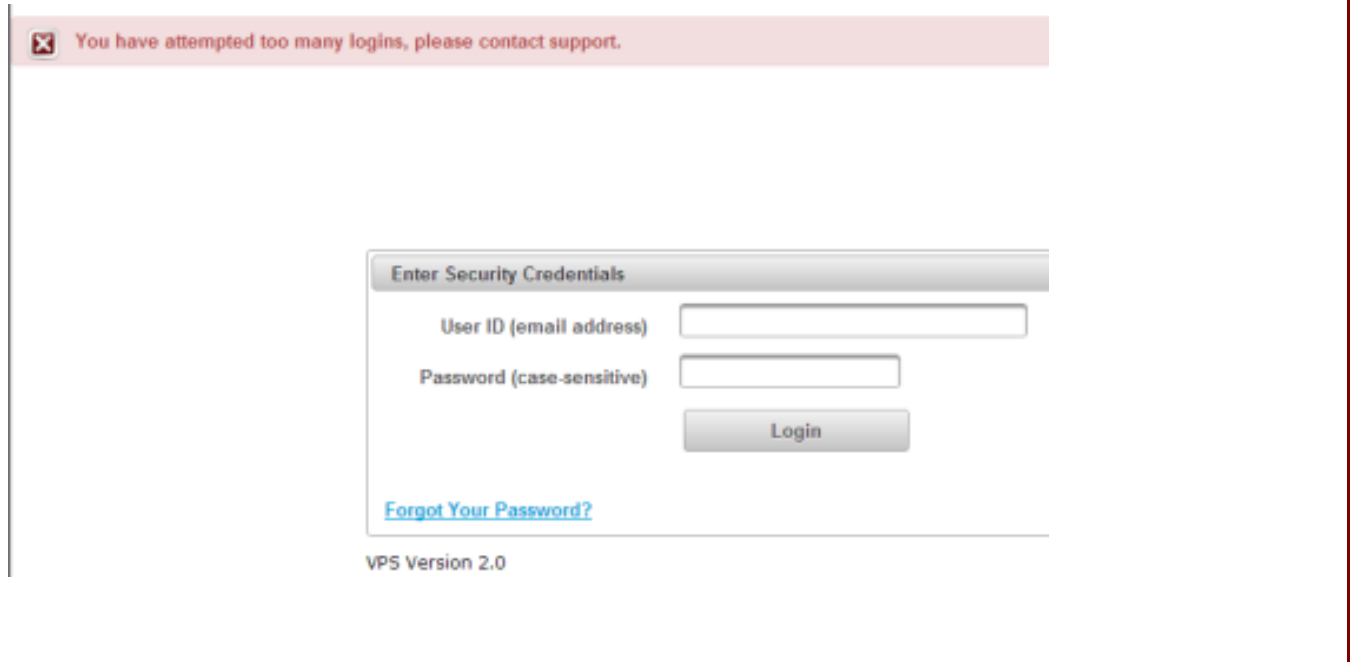
[Forgot Your Password?](#)

VPS Version 2.0

35 How to Reset a Password

How to Reset a Password

Users that have attempted to Login to VPS unsuccessfully 5 times or more, will be locked out of VPS and **User ID is disabled** message will appear. User will need to contact their Administrator to unlock them. Once the Administrator has unlocked the User, the User can reset their password using the **Forgot Your Password** link.



36 Definitions

Address Verification System	Also known as AVS. An identity theft prevention measure which verifies that the credit card billing address provided by the customer matches the address that is on file with the financial institution. Once the credit card is charged, an AVS response will be generated in the form of a single letter code. When failed, a photo ID is required
Administrator	A role that is assigned in VPS allowing the user to add, update, deactivate, reactivate, and reset password for users within assigned Agency. Agencies must have at least one Administrator
Authenticate	An identity theft prevention measure where the applicant's name, date of birth, and partial or full social security number is matched to the information on file with the Social Security Administration. When failed, a photo ID is required. ProChek is the name of the service that processes authentications
Business Units	Term used to describe agencies or offices that use VPS
Declined Payment	Payment was not authorized by the bank (the card has not been charged); the response from the bank will be: "declined payment"
Detail Report	Report that is generated during the Closeout process showing individual orders that are being closed
Manager	A role that is assigned in VPS allowing the user to enter, search, and modify orders, as well as perform voids and Closeout functions
Order	The information retained in the VPS system regarding the payment
Order Closeout	The end of the day process in the VPS system through which the business unit receives a check or ACH deposit for payments taken from consumers. Orders included in the Close Process are changed to a 'Closed' status, and Detail and Summary Close Reports are generated
Order Grid	This is a list of orders. In the Order Closeout window, the 'Orders to Close' Grid displays orders that are in an 'Open - Paid in Full' status, and are available for closeout. Orders can be moved from the 'Orders to Close' grid to the 'Orders to Exclude' grid during the Closeout process if the user chooses to not include those orders in the Closeout process
Order Receipt	The receipt displaying the order and payment information, can be printed from the VPS System
Password	The individual code that allows users to access the VPS System
POS	Point of Sale device used for credit/debit card transactions
Product	The items that can be paid for using the VPS, or any VitalChek remote processing option (i.e. birth/death/marriage certificates)

How to Use VitalChek Product Suite

Roles	Users in VPS are assigned a role (Supervisor, Manager, and/or Administrator). Each role has specific permissions that allow the user to complete their job duties
Summary Report	Report that is generated during the Closeout process showing a summary of all orders that are being closed
Supervisor	A role that is assigned in VPS allowing the user to enter, search, and modify orders as well as perform voids
User	The term for any person that has been given access to the VPS system.
User Name	The unique identifier that allows the User to logon to the VPS System. Must be unique to the VPS System across all business units
VPS	VitalChek Product Suite; the VitalChek software application
VitalChek	A LexisNexis Company that is the official source for government-issued vital records and offers payment solutions that help Government Agencies automate payments of fees, utility bills, license renewals, citations, monthly payments and more
Void Transaction	The steps that are completed to cancel a payment

37 How Do I Contact UPS for Pick-Up

How Do I Contact UPS for Pick-Up

Agencies may have a daily schedule where UPS picks up packages everyday. Agencies that do not have a daily pick-up scheduled will need to contact UPS to schedule a pick-up as needed.

UPS can be contacted:

1. www.UPS.com



The screenshot shows the UPS website interface. At the top, there is a navigation bar with the UPS logo, 'United States', and a search bar. Below this is a menu with options: 'My UPS', 'Shipping', 'Tracking', 'Freight', 'Locations', 'Support', and 'Business Solutions'. On the left side, there is a vertical menu with options: 'Track', 'Create a Shipment', 'Calculate Time & Cost', and 'Schedule a Pickup'. The 'Schedule a Pickup' option is highlighted with a red box and a red arrow pointing to it. Below this menu, there is a form for scheduling a pickup. The form includes a 'Type:' dropdown menu set to 'Package/Letter', a 'Do you have pre-printed labels?' dropdown menu set to 'Yes', and input fields for 'Pickup City:' and 'Pickup Zip Code:'. A 'Continue' button is located at the bottom right of the form. To the right of the form, there is a large banner for 'Making eBay Shipping Easy' with a man in a blue shirt looking at a computer screen. Below the banner, there are several smaller promotional tiles for 'Making eBay Shipping Easy', 'UPS WorldShip', and 'Ocean freight'. At the bottom of the page, there is a 'News and Information' section with a link to '2011 Rates Information' and a 'Logistics travels everywhere' logo.

2. 1-800-PICK-UPS (742-5877) and say "schedule a pick-up"

38 How to Log on to the POS Terminal

How to Log On to the POS Terminal

Each person that accepts payments at the counter has an individual Operator ID to login to the Point of Sale (POS) terminal.

Users log onto the POS terminal before each transaction.



Step 1 Using the keypad, the user inputs POS **Operator ID** and then presses the green enter button to logon to the terminal



Step 2 User is now logged onto the terminal and **Select Operation** screen displays



39 How to Log Off the POS terminal

How to Log Off the POS Terminal

Users are automatically logged off the POS terminal at the end of each transaction or by pressing the red **Cancel** button.



40 How to Run a POS Transaction

How to Run a POS Transaction

The POS terminal is used to run payments, or transactions.



Step 1

Inform the cardholder of the VitalChek fee

Step 2

User inputs POS **Operator ID** and then presses the green enter button to logon to the terminal

Note - if the Operator ID was entered incorrectly or does not have the authority for the transaction, an error message will be displayed



Step 3

Select Operation screen displays



Step 4

Select **Payment** option by pressing corresponding number on the pinpad then press the green enter button



Step 5

Select Product screen displays with available product options

Note - agencies with multiple products use the purple key above the number 1 to scroll



Step 6

Select Product by pressing the corresponding number on the pinpad then press the green enter button

For agencies with more than 10 product selections, press # for the first 1. Ex 10 = #0, 11 = #1, 12 = #2, etc



Step 7

Reference Number screen displays (if applicable)



Step 8

Enter Agency defined **Reference Number** (if applicable) and press the green enter button

Note: Alphabetic characters are obtained by hitting a number field multiple times to scroll through. For example: for the letter "a", press the 2 color twice



Step 9

Enter Amount screen displays



Step 10

Enter the **Payment Amount** using the numeric keypad. **Do not include the VCN Fee.** The VCN Fee will be added automatically. Press the green enter button.



Step 11

Another Product screen displays, use the purple buttons to select Yes or No.

If Yes, return to step 5 for each additional product.



Step 12

Select **Yes** or **No** by pressing the corresponding purple button



Step 13

Waiting on Card Swipe screen displays on terminal



Pin pad prompts customer to swipe card



Note: If the card will not swipe (the magnetic strip is worn or damaged), after 3 bad swipes, you will be prompted to manually enter the card number, expiration date, CV2 Code and card billing address Zip Code by using the key pad on the terminal.

Step 15

If applicable, the Debit/Credit screen displays on terminal and Pin Pad



Step 16

Select Debit or Credit by pressing the corresponding F1 or F4 button

Note - If **DEBIT** is selected, the cardholder will be prompted to enter their PIN number on the PIN pad with terminal displaying: **"Ask customer to enter PIN. Please Enter PIN"**

Step 17

Payment screen displays on terminal



Total Amount screen displays on Pin Pad. Select F1 for Yes or F4 for No and press the green enter button.



Step 18

Authorizing message displays on both Terminal and Pin Pad

Step 19

The **Agency Receipt** automatically prints and the **Print** screen displays on the terminal. Select Yes to print customer receipt and press the green enter key.

Note - Printed on the receipt is the payment confirmation number and the agency reference number.



41 POS Receipt Examples

POS Receipts

Agency and Customer receipts are printed after each POS transaction.

Agency Receipt

Agency Name
Agency Address
Agency City, State, Zip

MID: 999999
TID: 999999999999999
Terminal ID: V9999999
Date / Time: 99/99/99 99:99 AM EDT
Confirmation #: 99999999

Card #: *****9999
Expiration: ##/##
Transaction Type:
Payment/Purchase/Sale \$13.52
Transaction Date: 99/99/99 99:99 PM EDT
Payment Type: Credit
Card Type: MasterCard
Approval Code: 999999

Product Name \$11.02
12345

Agency Amount: \$11.02
LexisNexis Service Fee: \$2.50

Total Fee: \$13.52

Cardholder Signature

X-----

Merchant Copy

Agency Receipt - VISA Payments

Note - there are 2 separate authorization lines

Agency Name
Agency Address
Agency City, State, Zip

MID: 999999
TID: 99999999999999
Terminal ID: V9999999
Date / Time: 99/99/99 99:99 AM EDT
Confirmation #: 99999999

Card #: *****9999
Expiration: ###/###
Transaction Type:
Payment/Purchase/Sale \$2.50
Transaction Date: 99/99/99 99:99 PM EDT
Payment Type: Credit
Card Type: Visa
Approval Code: 999999

Card #: *****9999
Expiration: ###/###
Transaction Type:
Payment/Purchase/Sale \$1.00
Transaction Date: 99/99/99 99:99 PM EDT
Payment Type: Credit
Card Type: Visa
Approval Code: 999999

Product Name \$1.00
12345

Agency Amount: \$1.00
LexisNexis Service Fee: \$2.50
Total Fee: \$3.50

Cardholder Signature

X-----

Merchant Copy

Customer Receipt

Agency Name
Agency Address
Agency City, State, Zip

MID: 999999
TID: 9999999999999999
Terminal ID: V9999999
Date / Time: 99/99/99 99:99 AM EDT
Confirmation #: 99999999

Card #: *****9999
Expiration: ##/##
Transaction Type:
 Payment/Purchase/Sale \$13.52
Transaction Date: 99/99/99 99:99 PM EDT
Payment Type: Credit
Card Type: MasterCard
Approval Code: 999999

Product Name \$11.02
12345

Agency Amount: \$11.02
LexisNexis Service Fee: \$2.50
Total Fee: \$13.52

Customer Copy

Customer Receipt - VISA Payments

Note - there are 2 separate authorization lines

Agency Name
 Agency Address
 Agency City, State, Zip

MID: 999999
 TID: 9999999999999999
 Terminal ID: V9999999
 Date / Time: 99/99/99 99:99 AM EDT
 Confirmation #: 99999999

Card #: *****9999
 Expiration: ###/##
 Transaction Type:
 Payment/Purchase/Sale \$2.50
 Transaction Date: 99/99/99 99:99 PM EDT
 Payment Type: Credit
 Card Type: Visa
 Approval Code: 999999

Card #: *****9999
 Expiration: ###/##
 Transaction Type:
 Payment/Purchase/Sale \$1.00
 Transaction Date: 99/99/99 99:99 PM EDT
 Payment Type: Credit
 Card Type: Visa
 Approval Code: 999999

Product Name \$1.00
 12345

Agency Amount: \$1.00
 LexisNexis Service Fee: \$2.50
 Total Fee: \$3.50

Customer Copy

42 How to Void a POS Transaction

How to Void a POS Transaction

POS transactions may be voided using the POS terminal and selecting the Void option.



Step 1

User inputs POS **Operator ID** and then presses the green enter button to logon to the terminal

Note - if the Operator ID was entered incorrectly or does not have the authority for the transaction, an error message will be displayed



Step 2

Select Operation screen displays



Step 3

Select the **Void** option and press the green enter key



Step 4

VOID screen displays



Step 5

Enter the confirmation number located on the receipt and press the green enter button



Step 6

Void confirmation screen displays



Step 7

Verify the amount on the terminal, press Yes or No and press the green enter key

How to Use VitalChek Product Suite



Step 8

After pressing **Enter** to confirm **Yes**, the terminal displays the card swipe message



Pin Pad prompts the user to swipe the same card that was used for payment



Note - if the original transaction was Debit, the terminal will display the message: "Press Enter when ready to enter PIN on the PIN pad..."

User presses green enter button to OK and the customer is asked to enter PIN and press the green enter button on the PIN pad.

Note - The void amount displayed is the amount of the transaction plus the VCN fee

Step 7

After pressing **Enter** to confirm **Yes**, the Agency Receipt automatically prints

VOID RECEIPT - Agency Copy

Agency Name
Agency Address
Agency City, State, Zip

MID: 999999
TID: 99999999999999
Terminal ID: V9999999
Date / Time: 99/99/99 99:99 AM EDT
Confirmation #: 99999999

Card #: *****9999
Expiration: ##/##
Transaction Type: Void - \$13.52
Transaction Date: 99/99/99 99:99 PM EDT
Payment Type: Credit
Card Type: MasterCard
Approval Code: 999999

Product Name \$11.02
12345

Agency Amount: - \$11.02
LexisNexis Service Fee: - \$2.50
Total Fee: - \$13.52

Cardholder Signature

X-----

Merchant Copy

Note - Transactions using a VISA card will display 2 authorization lines:

VISA VOID RECEIPT - Agency Copy

Agency Name
Agency Address
Agency City, State, Zip

MID: 999999
TID: 99999999999999
Terminal ID: V9999999
Date / Time: 99/99/99 99:99 AM EDT
Confirmation #: 99999999

Card #: *****9999
Expiration: ###/##
Transaction Type:
Payment/Purchase/Sale - \$2.50
Transaction Date: 99/99/99 99:99 PM EDT
Payment Type: Credit
Card Type: Visa
Approval Code: 999999

Card #: *****9999
Expiration: ###/##
Transaction Type:
Payment/Purchase/Sale - \$1.00
Transaction Date: 99/99/99 99:99 PM EDT
Payment Type: Credit
Card Type: Visa
Approval Code: 999999

Product Name \$1.00
12345

Agency Amount: - \$1.00
LexisNexis Service Fee: - \$2.50
Total Fee: - \$3.50

Cardholder Signature

X-----

Merchant Copy

How to Use VitalChek Product Suite

Step 8

Terminal prompts the user to select Yes or No and press the green **Enter** button to print the **Customer Receipt**



Step 9

The terminal prints the **Customer Receipt** and returns the user to the **Enter Operator ID** screen

Agency Name
Agency Address
Agency City, State, Zip

MID: 999999
TID: 9999999999999999
Terminal ID: V9999999
Date / Time: 99/99/99 99:99 AM EDT
Confirmation #: 99999999

Card #: *****9999
Expiration: ###/###
Transaction Type: Void - \$13.52
Transaction Date: 99/99/99 99:99 PM EDT
Payment Type: Credit
Card Type: MasterCard
Approval Code: 999999

Product Name \$11.02
12345

Agency Amount: - \$11.02
LexisNexis Service Fee: - \$2.50

Total Fee: - \$13.52

Customer Copy

Note - Transactions using a VISA card will display 2 authorization lines:

VISA VOID RECEIPT - Customer Copy

Agency Name
Agency Address
Agency City, State, Zip

MID: 999999
TID: 999999999999999
Terminal ID: V9999999
Date / Time: 99/99/99 99:99 AM EDT
Confirmation #: 99999999

Card #: *****9999
Expiration: ###/##
Transaction Type:
Payment/Purchase/Sale - \$2.50
Transaction Date: 99/99/99 99:99 PM EDT
Payment Type: Credit
Card Type: Visa
Approval Code: 999999

Card #: *****9999
Expiration: ###/##
Transaction Type:
Payment/Purchase/Sale - \$1.00
Transaction Date: 99/99/99 99:99 PM EDT
Payment Type: Credit
Card Type: Visa
Approval Code: 999999

Product Name \$1.00
12345

Agency Amount: - \$1.00
LexisNexis Service Fee: - \$2.50
Total Fee: - \$3.50

Customer Copy

43 How to Print Last Receipt

How to Print Last Receipt

Users can reprint the last receipt that was printed on the POS terminal.



Step 1

User inputs POS **Operator ID** and then presses the green enter button to logon to the terminal

Note - if the Operator ID was entered incorrectly or does not have the authority for the transaction, an error message will be displayed



Step 2 User is now logged on to the terminal and **Select Operation** screen displays



Step 3 Select **Print Last Receipt** option and press the green enter key



Step 4 The Agency Receipt will automatically print

Agency Name
Agency Address
Agency City, State, Zip

MID: 999999
TID: 99999999999999
Terminal ID: V9999999
Date / Time: 99/99/99 99:99 AM EDT
Confirmation #: 99999999

Card #: *****9999
Expiration: ##/##
Transaction Type:
 Payment/Purchase/Sale \$13.52
Transaction Date: 99/99/99 99:99 PM EDT
Payment Type: Credit
Card Type: MasterCard
Approval Code: 999999

Product Name \$11.02
12345

Agency Amount: \$11.02
LexisNexis Service Fee: \$2.50

Total Fee: \$13.52

Cardholder Signature

X-----

Merchant Copy

Note - Payment made with a Visa card will display 2 authorization lines:

How to Use VitalChek Product Suite

Agency Name
Agency Address
Agency City, State, Zip

MID: 999999
TID: 99999999999999
Terminal ID: V9999999
Date / Time: 99/99/99 99:99 AM EDT
Confirmation #: 99999999

Card #: *****9999
Expiration: ###/##
Transaction Type:
Payment/Purchase/Sale \$2.50
Transaction Date: 99/99/99 99:99 PM EDT
Payment Type: Credit
Card Type: Visa
Approval Code: 999999

Card #: *****9999
Expiration: ###/##
Transaction Type:
Payment/Purchase/Sale \$1.00
Transaction Date: 99/99/99 99:99 PM EDT
Payment Type: Credit
Card Type: Visa
Approval Code: 999999

Product Name \$1.00
12345

Agency Amount: \$1.00
LexisNexis Service Fee: \$2.50
Total Fee: \$3.50

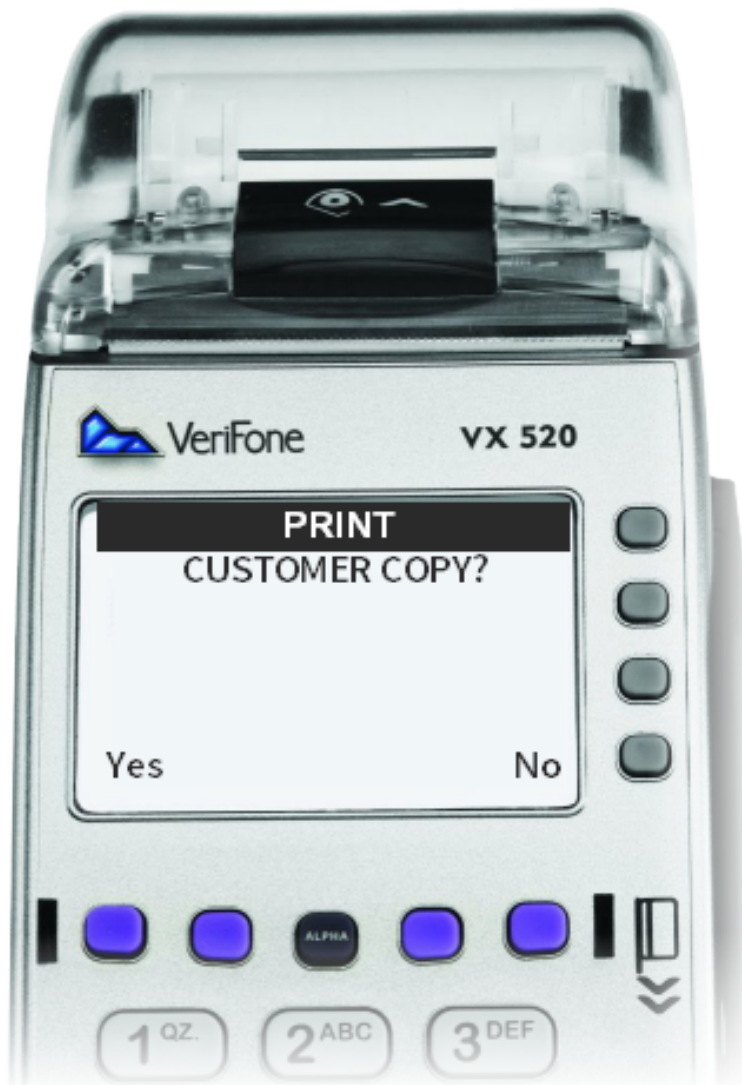
Cardholder Signature

X-----

Merchant Copy

Step 5

The terminal will prompt the user to select Yes or No then the green enter button to print the customer copy of the receipt



Step 6

Customer receipt prints

How to Use VitalChek Product Suite

Agency Name
Agency Address
Agency City, State, Zip

MID: 999999
TID: 999999999999999
Terminal ID: V9999999
Date / Time: 99/99/99 99:99 AM EDT
Confirmation #: 99999999

Card #: *****9999
Expiration: ##/##
Transaction Type:
 Payment/Purchase/Sale \$13.52
Transaction Date: 99/99/99 99:99 PM EDT
Payment Type: Credit
Card Type: MasterCard
Approval Code: 999999

Product Name \$11.02
12345

Agency Amount: \$11.02
LexisNexis Service Fee: \$2.50
Total Fee: \$13.52

Customer Copy

Note - Payment made with a Visa card will display 2 authorization lines:

How to Use VitalChek Product Suite

Agency Name
Agency Address
Agency City, State, Zip

MID: 999999
TID: 9999999999999999
Terminal ID: V9999999
Date / Time: 99/99/99 99:99 AM EDT
Confirmation #: 99999999

Card #: *****9999
Expiration: ###/###
Transaction Type:
Payment/Purchase/Sale \$2.50
Transaction Date: 99/99/99 99:99 PM EDT
Payment Type: Credit
Card Type: Visa
Approval Code: 999999

Card #: *****9999
Expiration: ###/###
Transaction Type:
Payment/Purchase/Sale \$1.00
Transaction Date: 99/99/99 99:99 PM EDT
Payment Type: Credit
Card Type: Visa
Approval Code: 999999

Product Name \$1.00
12345


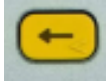


Agency Amount: \$1.00
LexisNexis Service Fee: \$2.50
Total Fee: \$3.50

Customer Copy

44 Point of Sale Keys

Point of Sale Keys

Additional keys are used periodically to initiate actions/jobs.

Key	Function	Action Required
	Cancel an un-submitted transaction	Press Cancel button
	Backspace to remove alpha or numeric characters	Press back button
	Type alpha characters	Press Alpha button
	Scroll to another screen	Press scroll button

45 Helpful Hints for POS

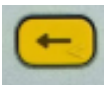
Helpful Hints

Tips for using your Point of Sale terminal

Please be aware that before every transaction, the cardholder is aware of the VCN fee and that the amount is correct before completing the application.

The VCN fee is added automatically, so when you are prompted to enter the transaction amount, do NOT include the VCN fee.

The yellow back button functions as a backspace



If you need to cancel out of a transaction before receiving an authorization number, press the red cancel button. You will be returned to the main entry screen.



To shut down the terminal and the PIN pad, ALWAYS unplug the power from the electrical outlet FIRST and then disconnect all the cables.

Cardholder PIN number must be at least 1 digits and no more than 6 digits.

If the debit network is down, a message will be displayed: "Debit Network Unavailable. Would you like to try another card?"

46 Troubleshooting Tips for POS

Troubleshooting Tips for POS (Point of Sale)

Problem - Error on the display screen states: **Main Error. Page Cannot be Opened**

- Step 1** Press the F3 button
- Step 2** Locate the **Go to Home Page** option by pressing the F1 button
- Step 3** Once highlighted, press the green enter button
- Step 4** The user will be returned to the **Enter Operator ID** screen

Problem - A new paper roll is needed.

- Step 1** To insert a new paper roll, open the printer cover by pulling the release on the top of the cover
- Step 2** Hold the roll of paper with the leading end coming from the bottom of the roll and toward the front of the terminal then place into the paper roll cradle
- Step 3** Close the printer cover making sure the leading edge of the paper remains on the outside, and that the lid has snapped down securely

Problem - No receipt tape is available.

The user will still be able to process transactions, however an error message will be received when the receipt attempts to print. Add more paper to the terminal, then press the green enter button to print the receipt.



User may also print a receipt from the VPS application.

Problem - a terminal needs to be restarted.

- Step 1** Enter Operator ID and press the green enter button

Step 2 Select Operation screen displays, press #, then *, then green enter button

47 Point of Sale Equipment

Point of Sale Equipment

There are several components that arrive in the box with your Verifone equipment.

**Verifone
VX520
Terminal**



**Verifone
VX520 Power
Supply**



**Verifone VX
805 Pin Pad**



**Verifone VX
805 Pin Pad
Cord**



**Ethernet
Cable**



48 How to Install Point of Sale Equipment

Point of Sale Equipment

There are several components that arrive in the box with your Verifone equipment.

**Verifone
VX520
Terminal**



**Verifone
VX520 Power
Supply**



**Verifone VX
805 Pin Pad**



**Verifone VX
805 Pin Pad
Cord**



**Ethernet
Cable**



[Step-by-Step Installation Guide](#)

If you experience any issues while installing your equipment, please contact our Technical Help Desk:

Phone: 1-866-628-9244, option 3.

Email: vcn_helpdesk@vitalchek.com

Step 1 Turn the Verifone VX 520 terminal over and lift cover



Step 2 The ports are exposed



The pin pad cord comes connected in the RS-232 port.

Step 3

Connect the ethernet cable - insert into the ETH port

Step 4

Connect the power cord to the surge protector - once all 3 cables/cords are in place replace the rear cover on the terminal and plug-in the power cord to the surge protector

Step 5

Once the power cord is plugged in the terminal and pin pad will start up. The pin pad has powered up and shows Welcome, select VitalChek on the terminal by using the F2 or F3 button. The terminal will then go to the Operator ID screen

49 How to Reset a User's Password

How to Reset a Users Password

Administrators are able to reset user's passwords.

Users must have a role of **Administrator** to be able to view and access **Administration** functions.

The 'Add New User' form contains the following elements:

- User ID (email address)**: Text input field.
- First Name**: Text input field.
- Last Name**: Text input field.
- Start Date**: Date picker showing 12/28/2012.
- End Date**: Date picker showing 12/31/2999.
- Locked**: Checkable checkbox.
- Expired**: Checkable checkbox.
- Pin**: Text input field.
- Roles**: Radio buttons for Administrator, Manager, Supervisor, and Clerk.
- Agency**: Two lists, 'Available' and 'Selected', with a list of agencies: Arlington Vital Records Bureau, Denton County Clerk, and Tri County Health Dept. Navigation arrows are between the lists.
- Buttons**: 'Save' and 'Cancel' buttons at the bottom.

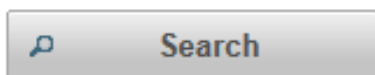
Step 1 From the **Administration** menu, select **User Maintenance**. **User Maintenance** screen is displayed

The 'User Maintenance' screen includes:

- Input Fields**: First Name, Last Name, and Expired (checkbox).
- Buttons**: Search, Clear, and Add New User.
- Table Header**: User Name, First Name, Last Name, Locked, Expired, Last Login Date.

Step 2 Search for User by entering **First** and **Last Name** data.

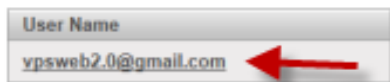
Step 3 Click **Search**



Step Search results are displayed. Click underlined **User Name** link

How to Use VitalChek Product Suite

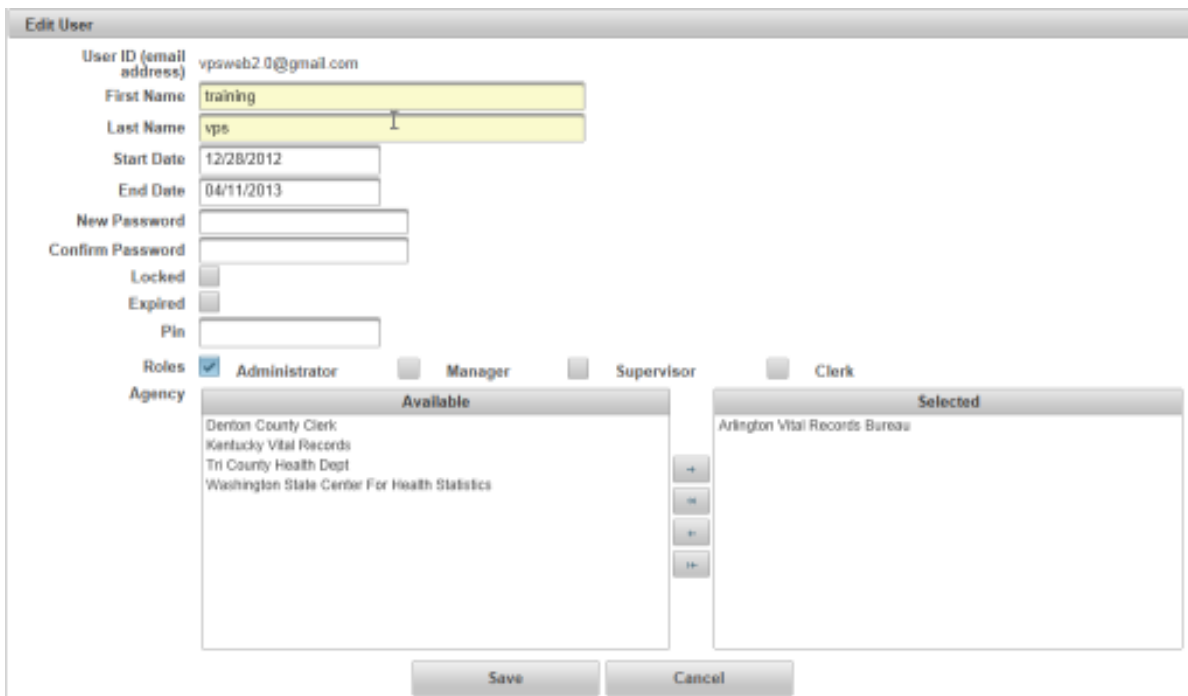
4



User Name
vpsweb2.0@gmail.com

Step **Edit User** screen is displayed

5



Edit User

User ID (email address) vpsweb2.0@gmail.com

First Name training

Last Name vps

Start Date 12/28/2012

End Date 04/11/2013

New Password

Confirm Password

Locked

Expired

Pin

Roles Administrator Manager Supervisor Clerk

Agency

Available	Selected
Denton County Clerk Kentucky Vital Records Tri County Health Dept Washington State Center For Health Statistics	Arlington Vital Records Bureau

Save Cancel

Step Enter a **New Password**

6

New Password

Step Enter new password again in **Confirm Password** field

9

Confirm Password

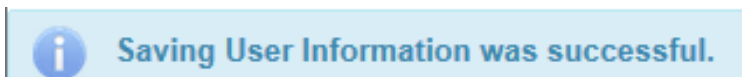
Step Click **Save**

10

Save

Step **User Information saved successfully** message is displayed

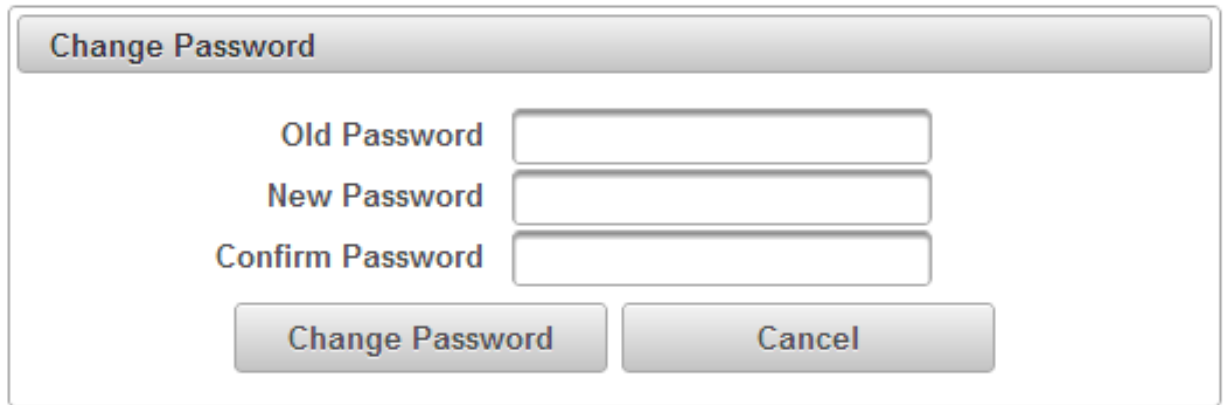
11



Saving User Information was successful.

Step When User logs into VPS, the **Change Password** screen will display

12



The image shows a 'Change Password' dialog box. It has a title bar at the top with the text 'Change Password'. Below the title bar, there are three text input fields. The first is labeled 'Old Password', the second is labeled 'New Password', and the third is labeled 'Confirm Password'. At the bottom of the dialog box, there are two buttons: 'Change Password' on the left and 'Cancel' on the right.

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