



# **Skipjack Merchant User Guide**

**“Quick Guide”**  
(a supplement to the Merchant User Guide)

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## REVISION RECORD

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Date	Version	Description
February 14, 2002	2.1	Release of Skipjack Merchant Guide "Quick Guide".
November 1, 2002	2.11	Provided additional detail on partial credits.

*The following is a summary of the Skipjack Merchant User Guide. It is designed to give you a starting point for understanding the various features, and will serve as a handy reference while you're using Skipjack. Each section is covered in more detail in the "Merchant User Guide" so that you can find more information on any particular topic. In this guide, page number references have been provided to the Main Guide for quick reference.*

*You may wish to print out the Quick Guide so that you can keep it by your PC for fast reference.*

### **Logging In** ([User Guide Page 9](#))

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Login at <https://secure.skipjack.com>. Enter your login serial #, username and password and select either "Merchant Services" or "Reporting". Press "submit". If you've misplaced your serial number, username or password, call Skipjack Support at (888) 368-8507 and select Option #1 or contact your Skipjack Authorized Reseller.

The "Account Summary" screen will be the primary interface to all your administrative tools and resources. It is divided into 3 key areas:

1. Administrative tools (for account preferences, creating sales reports & integration assistance)
2. Transaction history
3. Buttons to manage the transactional data

### **Account Preferences** ([User Guide Page 11](#))

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#### **Vendor Information** ([User Guide Page 11](#))

- Should contain all contact information for your organization.
- Tax Rate & Tax Shipping features only apply when using the Skipjack Shopping Cart.
- Default setting for an authorized transaction to expire is seven days. Normally, a transaction is submitted for settlement within 24 hours (daily) of an approved authorization.
- An "idle" transaction means either the account is configured for manual settlement or the transaction is in a frozen state.
- Merchant account access rights should be set to VIEW only to eliminate the account from being modified. The transaction field defaults to full access.

#### **Batch Settlements** ([User Guide Page 13](#))

- A Batch is a collection of transactions saved for submitting at one time, usually each day.
- The default **Batch Settlement** setting is Daily. The options are: 7, 14, or 30 days or Manual.
- A manual settlement would be desired if the merchant wants to view each transaction before settlement or the merchant needs time for shipment of the product.

## **Manual Settlements**

- Default is Automatic Settlement. If your company wishes to be configured for Manual Settlement, please contact Skipjack support staff at (888) 368-8507 or your Skipjack Authorized Reseller.
- When an account is configured for Manual Settlement, the transaction register will act appropriately. Transactions that are approved will sit in the register until the merchant submits them for settlement.
- The transaction(s) will still be sent to settlement by Batch once submitted.
- The manually submitted transaction will appear in the register with asterisks (\*) around the customer name to let the merchant know that it was submitted.

### **Response Files** ([User Guide Page 14](#))

Response files are created to communicate with both the merchant and customer after an order has been placed. There are five response methods to consider:

#### **1. Skipjack Hosted Default Customizable Web Response Files** ([User Guide Page 14](#))

These are HTML pages that are displayed to your customer to indicate what occurred after a transaction takes place. In all cases, the following possible results have associated Response pages:

- Thank You For Your Order
- Invalid Field Entry
- Invalid Credit Card
- System Failure

Defaults containing your company name, email & phone/fax numbers were generated when your account was created. You can use defaults or customize them.

“**Edit**” will display the HTML code.

“**View**” to preview the default response pages.

“**Back**” button in your browser to return to the HTML source screen.

“**Save**” to accept any changes you make.

#### **2. Merchant Hosted Web Response Files** ([User Guide Page 18](#))

You may choose to send your customer to a web page or URL that you have design and host. An example of a complete URL is: <http://www.someotherURL.com/ThankYou.html>

- The URL must end in a filename, not a folder or directory.
- You do not need to have all four fields filled out.
- URL's that are left blank will default to the Response pages.
- “**Submit**” to accept changes

#### **3. Email Response Templates** ([User Guide Page 19](#))

Sends a post-transaction email to the customer and to the merchant indicating the appropriate situation: Success, Failure, System Failure, as well as the transaction details. Emails are generated using the default templates provided, or you may customize them.

“**Edit**” button to change email templates.

“**View**” to preview the default email response

“**Back**” button in browser to return to the email template screen

“**Save**” to accept your changes

*You must use the tags (<example tag>) within your templates so that the transactional data is passed to the email message that is sent to you and your customer.*

#### **4. Backend Response URL** ([User Guide Page 21](#))

Please refer to the Integration Guide for information on the Backend Response URL.

### 5. Email List ([User Guide Page 21](#))

When the merchant account is initially set up, a single email address is assigned by the merchant and used for receiving emailed order confirmations. The **Email List** allows the merchant to add additional email addresses that wish to receive the order confirmation.

**Important Note:** Do not enter the original email address to this list. Doing so will cancel the email confirmation for that address altogether because the mail server rejects the message as a duplicate.

### Manage Users ([User Guide Page 24](#))

Skipjack enables different users within your company to have different access “rights”. This is useful in instances where you may wish one individual to have a limited range of control over transactions or merchant accounts, while giving another greater or complete control. Select “Manage Users” from the main menu. The various functions that can be performed include:

<b>New User</b>	Establish user “rights” for a new user of the account
<b>Edit User</b>	Edit user rights for an existing user of the account
<b>Delete User</b>	Delete a specific user of the account
<b>Freeze User</b>	Prevent a specific user from accessing the account
<b>Thaw User</b>	Reinstate access rights to a specific user that was previously frozen)
<b>Change Password</b>	Change a specific user’s password

### Account Summary Features ([User Guide Page 30](#))

The Account Summary displays your Merchant Number, account Status, total Sales to date, total Credits to date, all Pending Sales, all Pending Credits, the Current Balance and the Ending Balance for all transactions. **Account buttons (New, Edit, Delete, Freeze, Thaw)** are initially deactivated.

### View Statement ([User Guide Page 32](#))

“View Statement” will display all Sales and Credits for the date range specified in the From/To fields.

- Default date range is for the previous month
- For details of an individual transaction, click on appropriate customer name
- “**Back**” in your browser once or twice to return to the Account Summary screen

### View Register ([User Guide Page 32](#))

“**View Register**” displays all transactions regardless of the status.

- For a specified date range, it will display the last 50 transactions
- For a single date, or the current date, it will display all the transactions, even if >50

Register Functions:

- Displays the Auth Code, Date, Time, Customer Name, Amount, & Status for each transaction
- Permits a transaction to be Authorized, Settled, Credited and Deleted manually (Please **NOTE** that the Authorize and Settle features are only applicable to an account that is configured for manual settlement)

The available status codes for a transaction are:

<b>Pend Auth</b>	Pending Authorization
<b>Approved</b>	Authorized awaiting settlement
<b>Settled</b>	Authorized and Settled
<b>Pend Credit</b>	Pending Credit
<b>Declined</b>	Transaction Failed

## Transaction Detail ([User Guide Page 34](#))

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Select the customer name from within the Transaction Register. Select the scroll bar on the right side of the screen to display the remaining portion of the transaction.

For any individual transaction, you can: Delete, Freeze, Thaw, or Make Recurring.

**After performing any of these commands, press “Back” in your browser twice and “Refresh” to update the Transaction Register.**

### Freeze a Transaction ([User Guide Page 37](#))

A merchant may wish to postpone the settlement process for an individual transaction for whatever reason. Use the **Freeze Transaction** command to perform a suspension. A transaction can only be frozen if the transaction is in the Approved state.

- The Transaction Register will display all frozen transactions in the color **RED**
- A frozen transaction will not be submitted for settlement until it is in the Thawed state
- Freeze and thaw commands are located at the bottom of the Transaction Detail screen

### Thaw a Transaction ([User Guide Page 39](#))

The Thaw Transaction command will only work on a transaction that is frozen.

From the Transaction Register select the frozen transaction you wish to thaw. Scroll to the bottom of the transaction detail screen and select “Thaw Transaction”.

### Delete a Transaction ([User Guide Page 41](#))

There are 2 ways to delete a transaction from the register: (1) Use the radio buttons on the Transaction Register; or (2) Use the delete button at the bottom of the Transaction Detail screen.

- Deleting a transaction will affect the results in the Account Summary screen.
- Deleted transactions are accounted for within the reports.
- Before a transaction can be deleted, the merchant must verify the delete request by selecting the **Complete Requests** button. This safety measure gives the merchant the ability to use the Back button in the browser to avoid the transaction(s) from being deleted.

### Make Recurring

Details on the Make Recurring option can be found in the above section, Recurring Payments.

### Credit a Transaction ([User Guide Page 43](#))

In order to credit a transaction, the transaction must be in the **Settled** state. There are two methods to issuing a credit: (1) using the **Action** columns to the left of the transaction and (2) from the **Transaction Detail** view.

NOTE: Following a credit by either of these methods, the original transaction will remain as a settled transaction, and a new transaction will be created with a Pend Credit status. Once the credited transaction has settled, the status will change from Pend Credit to Settled, and the settled amount will have a negative value equal to the original transaction.

### Using the Action Column ([User Guide Page 43](#))

Select the “**Credit**” radio button next to the transaction you want to credit, and “**Submit**”. The request amount will be shown as 0.00 if you are doing a full credit (crediting the original purchase amount). By leaving the Adjusted Amount field blank, you are requesting a full credit.

“Complete Requests” button to complete the credit.  
“Back” in your browser twice, and “Refresh” to update the Transaction Register.

#### **From the Transaction Detail Screen** (User Guide Page 46)

Select the transaction you want to credit on the Account Summary screen. When the Transaction Detail screen appears, scroll to the bottom of the screen. Click the **Credit Transaction** button.

“Back” in your browser twice and “refresh” to update the Transaction Register.

#### **Issuing Partial Credits** (User Guide Page 47)

To credit the customer less than the full purchase amount (e.g. shipping or other charges), you can issue a partial credit from the Transaction Register using the Action Columns. Select the **Credit** radio button to the left of the transaction you wish to credit.

In the **Adjusted Amount** column to the right of the transaction, enter the amount you wish to credit to the customer’s card and “Submit” (do not enter a negative sign). To process the credit, click the “Complete Request” button.

Click “Back” in your browser twice and “refresh” to update the Transaction Register and view your pending credit awaiting settlement. Once the credited transaction has settled, the status will change from “Pend Credit” to “Settled”. The settled amount will have a negative value equal to the adjusted amount.

#### **View Pending** (User Guide Page 51)

“**View Pending**” displays all pending sales & credits for the date range specified in the From/To fields.

- Default date range is for the previous month
- For details of an individual transaction, click on the appropriate customer name
- “**Back**” in your browser once or twice to return to the Account Summary screen

#### **Recurring Payments** (User Guide Page 52)

Recurring payments allow a merchant to setup a transaction that will be billed to a customer’s credit card at regularly scheduled intervals (nine different schedules are available). There are three ways to create recurring payments for a customer:

- From the Account Summary screen - to create a new recurring payment
- From the Transaction Detail screen - to make an existing transaction recurring
- From an external application (such as a Virtual Point of Sale)

#### **Add a Recurring Payment** (User Guide Page 53)

To add a new recurring payment from within Skipjack, click the “New Payment” button. Enter the customer information into the top portion of the screen. On the bottom portion, enter the credit card #, expiry date, item number, item description, any comments, order number, total # of recurring transactions, date of first payment, amount of transaction and frequency of payment. Press

“**Submit**” then “**Back**” in your browser twice, and “**Refresh**” to display the new recurring payment.

#### **View / Edit Recurring Payment** (User Guide Page 56)

To view the payment schedule or to edit individual payments, click the customer’s name.

To edit individual transactions:

- Select the transaction for editing by clicking on it
- Make the appropriate changes & scroll to the bottom of the screen
- If the customer wishes to change credit cards, do it now
- “Submit” and then hit “Back” in your browser twice and “Refresh” to view changes

To change the preferences for **ALL** the recurring payments for an individual customer:

- Select the radio button to the left of the customer's name
- **"Edit Payment"** to make the appropriate changes
- "Submit" and then hit "Back" in your browser twice and "Refresh" to view changes
- Validate that the change took effect over all scheduled payments by clicking the customer's name to display the remaining transactions

### **Make an Existing Transaction Recurring** ([User Guide Page 67](#))

Account Summary screen, View Register

Click on a transaction & scroll to the bottom of the screen to get the order detail

- The transaction can be made recurring by clicking the **Make Recurring** button
- The customer information has been pulled from the original transaction & may be edited now if you wish.
- Scroll to the bottom of the screen to set up the recurring payment schedule. You will need to add the item & payment information.
- Remember to charge your customer only for the remaining months left in his subscription
- **"Submit"** to create the recurring payment

Go **"Back"** in your browser to the Account Summary screen.

Click **"Recurring Payments"** to verify the newly-added recurring payment.

### **Email Notifications** ([User Guide Page 72](#))

Email notification is a method to broadcast a message to the merchant's entire customer base (i.e. anyone that has processed a transaction and submitted an email address). If the feature is not accessible, please contact our sales staff to enable the Email Notification option.

**Important Note:** *If you want this feature disabled to prevent any mishaps like a (e.g. a disgruntled employee) sending a nasty email, please contact our sales department to deactivate the Email Notification option.*

### **Testing a New Merchant Account** ([User Guide Page 74](#))

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One way to test the new Skipjack Merchant account is through Skipjack's Virtual Point of Sale (VPOS) order form. The VPOS order form is located within Skipjack Merchant Services area of your Skipjack account. The VPOS order form is discussed in more detail starting on page 90 in the full version of the Skipjack User Guide.

It is recommended that the merchant test their Skipjack Merchant account with a valid credit card via the VPOS form. Login to Skipjack Merchant Services to validate the order authorized and settled. Once the transaction has settled, you can credit the transaction.

### **Skipjack Transaction Reporting** ([User Guide Page 75](#))

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To access the Reporting Tools, select "Reports" at the login prompt or from the Account Summary screen. After creating any of the following reports, simply click the **"Back"** button in your browser (or select Reports Manager in the main menu) to return to the Skipjack Reports Manager.

- You can create Custom Reports to include filters, card types, and many other options.
- The reports can be downloaded in comma-delimited format for database or spreadsheet program import.

**Report Types** ([User Guide Page 75](#))

A variety of report types are available within Skipjack, including:

**Transaction Report** ([User Guide Page 78](#))

The Transaction Report displays authorizations, settlements and credits for a specific date range, as well as specific supporting information.

**Customized Report** ([User Guide Page 79](#))

The Customized Report lets you create a report specifically tailored to your needs by selecting the appropriate data fields and column layout.

**Daily Report** ([User Guide Page 80](#))

The Daily Report provides a quick “snapshot” of transaction activity for a specific day.

**Daily Summary** ([User Guide Page 80](#))

The Batch Summary Report shows the total dollar amount of settlements that occurred within each batch, by credit card type, within a selected date range.

**Date Range Summary** ([User Guide Page 81](#))

The Date Range Summary Report shows the total dollar amount of settlements that occurred, by credit card type, on a specific day. It also displays the total settlement amount over the entire date range, by credit card.

**View Statistics** ([User Guide Page 82](#))

The View Statistics Report displays relevant sales (settled transaction) statistics, by credit card type, across the selected date range (number of transactions, average order size, minimum order size, maximum order size, total dollars).

**Frozen Transactions Report** ([User Guide Page 83](#))

The Frozen Transactions Report displays all transactions that have been frozen across the selected date range.

**Card Type Report** ([User Guide Page 84](#))

The Card Type Report displays the date, amount, transaction status, customer name, customer email, phone number and order number for a specific credit type across a selected date range.

**Order Number Report** ([User Guide Page 84](#))

The Order Number Report enables you to search for a specific transaction by order number, or for a specified range of order numbers.

**Card Numbers Report** ([User Guide Page 85](#))

Similar to the Order Number Report, the Card Numbers Report lets you search for a specific transaction or range of transactions based on a specific credit card number or range of credit card numbers.

**Batch Details Report** ([User Guide Page 86](#))

The Batch Details Report allows you to view all transactions for a specified batch number (please note that the processor batch number may not match the batch number you receive on your account statement).

**Transaction Audit Report** ([User Guide Page 87](#))

The Transaction Audit Report displays additional information on settled transactions. The audit ID's can be obtained by using the Transaction Report (or Customized Report) and “toggling on” Audit ID in the “Customize View of Reports” section of the Reporting Tool.

**Transaction Posted from IP Report** ([User Guide Page 88](#))

This report allows you to identify the IP address of the device that submitted any specific transaction to Skipjack.

**Customer Name Report** ([User Guide Page 88](#))

The Customer Name Report allows you to view all transactions for a specific name across a specified date range.

**Downloading Reports** ([User Guide Page 89](#))

Select “Download” from the main menu once you have created your report. A new window will open, displaying the report detail in comma-delimited format. To make this file accessible to your database or spreadsheet program, simply select File / Save As.

**Save/Print** ([User Guide Page 91](#))

Select “Save/Print” from the top menu of the reporting tool to format the report in printer-friendly format. To save an html version of the report, select File / Save As in your browser.

**Virtual Point of Sale (VPOS)** ([User Guide Page 93](#))

The Skipjack Virtual Point of Sale (VPOS) terminal can be used for many purposes. It can be used at the physical storefront to enter orders, “one-off” transactions, at trade shows, and while traveling. It is necessary to have an Internet connection in order to use this form. The form is located in your Skipjack Merchant Services account. Your developer can save the VPOS and customize the interface to meet your individual requirements.

To use the Skipjack VPOS, simply type the item number, quantity, description, and per unit cost in the **Order Information** area. After entering the Order Information, enter your HTML Serial number (**not** your Login Serial Number) into the VPOS form.

The next step is to enter the customer billing and shipping information. The fields that are noted with a **red** asterisk must be completed. You cannot modify the total amount once the calculation is performed. After you have completed the form, click the **Submit Order** button. You will be asked to confirm the information in order to proceed.