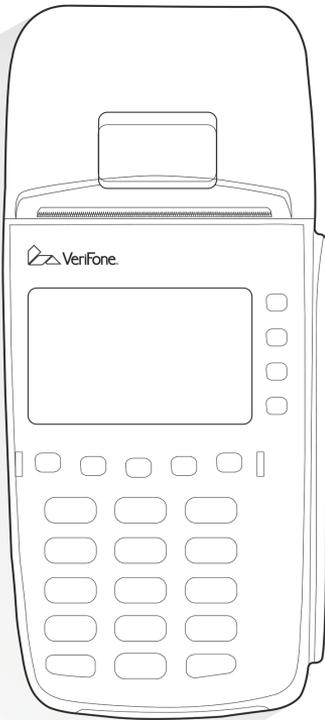




VX 520

Quick Reference Guide
v1.0



Hello,

Welcome to CSG Forte!

This is your VX 520 Quick Reference Guide, a helpful and handy document that can walk you through the easy setup and common operations of your device.

This guide shouldn't have come alone. Make sure you also received the correct point of sale device(s) that you ordered.

If you have any questions, you can find our contact information listed on the back of this guide.

Thanks for choosing us as your payment provider. We're thrilled to offer you a reliable and secure, swift and smooth payments experience. Let's get started.

Sincerely,

CSG Forte

Table of Contents

Terminal Setup

Hybrid Terminal Setup - (RS232)

Hybrid Terminal Setup - (Mini USB)

Standalone Terminal Setup

Sale

Manual Keyed Entry Sale

Refund

Forced Sale

Void

Reprint Receipt

Print Reports

Troubleshooting Tips

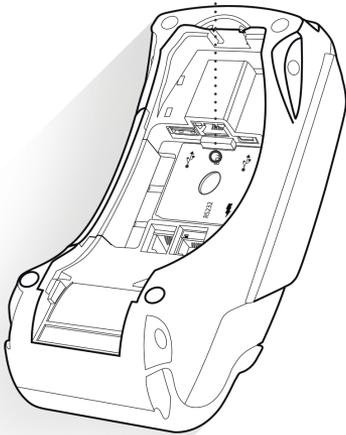
FAQs

Terminal Packaging List

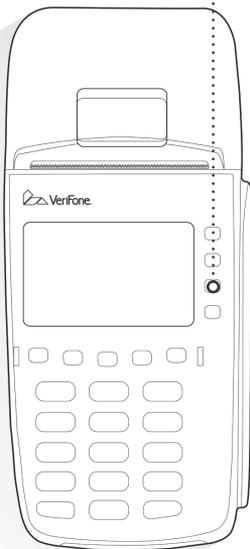
Notes



Terminal Setup



1. Plug network (Ethernet) cable into the bottom of the terminal (labeled ETH).
NOTE: Do not use a phone cord.
2. Plug in the terminal's power cable. A blank screen will appear momentarily.
3. Wait for the CommServer, Forte and CAM screen.
4. Press F3 for Forte.
5. The screen will cycle through the following messages:
Reading Batch File for Merchant I
Communication Status - Connected
6. Wait for the Credit/Debit/Check screen.
 - a. Reading Batch File for Merchant I
 - b. Communication Status
 - c. Initializing Pin Pad
 - d. Initializing - Please wait
7. The terminal is now ready to use.
8. We recommend running a test transaction to ensure functionality. A good option is to charge \$0.01 and then to void the transaction.

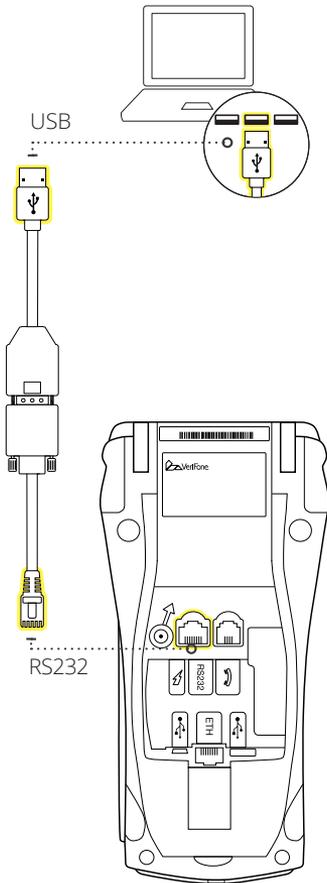


1. Press the F3 Key to the right of Forte.
2. The screen displays "Reading Batch File for Merchant 1" for about 15 seconds, then "Communication Status - Connected -" before going to the Main Menu.
3. The terminal is now set up and ready for use.
4. You can swipe or manually enter a Credit Card (F2), Debit Card (F3) or Check (F4).

NOTE: Your Forte merchant account must be set up for the payment method you use.

5. We recommend running a test transaction (for a penny and then voiding it) to ensure functionality.

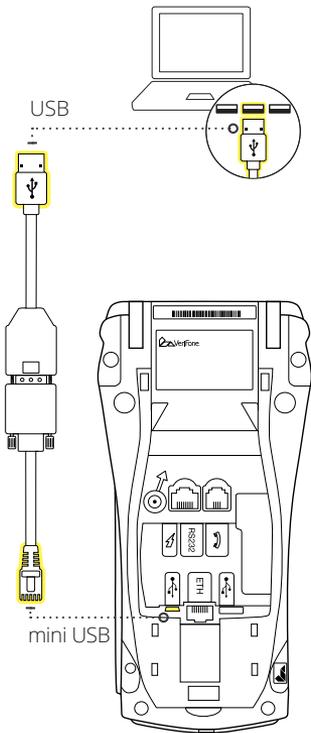
Hybrid Terminal Setup - (RS232)



1. Plug the network (Ethernet) cable into the bottom of the terminal (labeled ETH).
NOTE: Do not use a phone cord.
2. Plug the USB end of the cable into the computer.
3. Plug the opposite end of the cable into the RS232 port.
4. Plug in the terminal's power cable.
5. It takes about 15 seconds to come to the screen that has CommServer, XPI and Forte. Select Forte from the options displayed on the terminal screen.
6. The screen will display:
"Reading Batch File For Merchant 1", "Communication Status-CONNECTED" and "Initializing PINpad".
The terminal will then display a blank screen.
7. This completes this phase of the terminal setup.
8. Follow any additional instructions from your software provider for terminal setup.

*You may need to know the COM Port, which can be identified using your computer's Device Manager. Windows users can download the device driver located in the Code Samples section of our DevDocs. Web-based application users require the device handler, which is available through Tech Support.

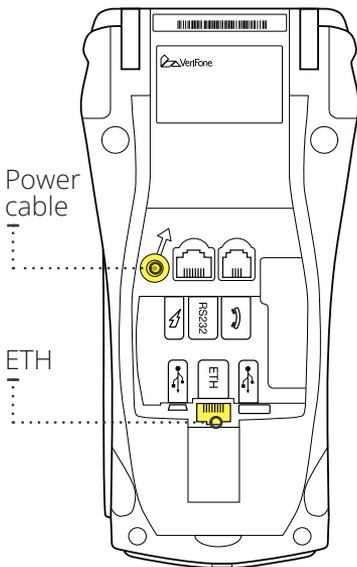
Hybrid Terminal Setup - (Mini USB)



1. Plug the network (Ethernet) cable into the bottom of the terminal (labeled ETH).
NOTE: Do not use a phone cord.
2. Plug the USB end of the cable into the computer.
3. Plug the opposite end of the cable into the mini USB port.
4. Plug in the terminal's power cable.
5. It takes about 15 seconds to come to the screen that has CommServer, XPI and Forte. Select Forte from the options displayed on the terminal screen.
6. The screen will display:
"Reading Batch File For Merchant 1", "Communication Status-CONNECTED" and "Initializing PINpad".
The terminal will then display a blank screen.
7. This completes this phase of the terminal setup.
8. Follow any additional instructions from your software provider for terminal setup.

*You may need to know the COM Port, which can be identified using your computer's Device Manager. Windows users can download the device driver located in the Code Samples section of our DevDocs. Web-based application users require the device handler, which is available through Tech Support.

Standalone Terminal Setup



1. Plug the network (Ethernet) cable into bottom of the terminal (labeled ETH).
Note: Do not use a phone cord.
2. Plug in the terminal's power cable.
After turning on the equipment, you will come to a screen that will display the following:

CommServer - Used to configure static IP addresses and check network connectivity.

XPI - Cosmetic that indicates the EMV software is installed. **Do not** choose this option, otherwise you will have to unplug/plugin the terminal.

Forte - Used to manage transaction processing. **Choose** this option.

3. After choosing Forte, the bottom of the screen will display the following in order:
 - Reading Batch File for Merchant 1
 - Communication Status
-- Connected --
 - "Initializing PINpad"

Once in the Forte Application, the screen will display:

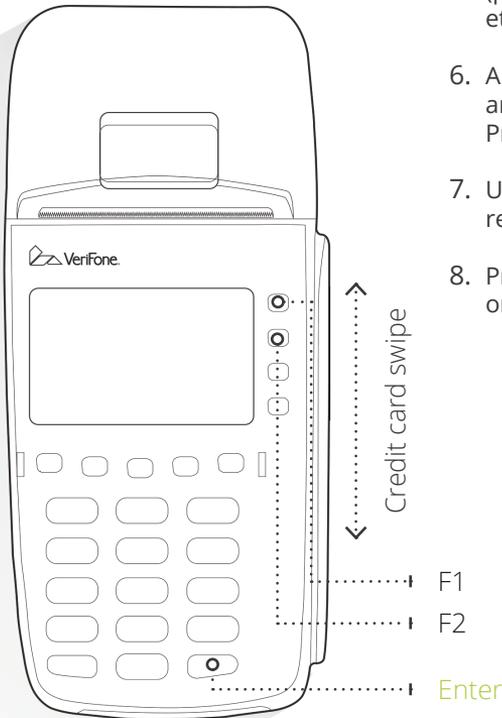
Your Merchant Name

- Credit Card
- Debit Card
- Check

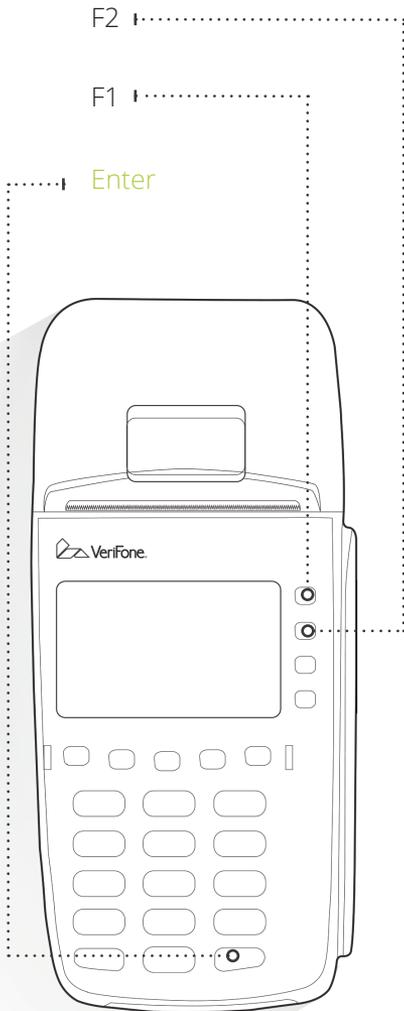
Select payment type to begin processing.

Sale

1. Press F2 for credit or F3 for debit.
2. Press F1 for SALE.
3. Input the amount and press **Enter** (Green Key in the lower right corner).
4. Dip or swipe the card (magnetic stripe facing inside).
5. Input any optional identifier(s) (parcel number, account number, etc.) and press **Enter**.
6. A screen will appear with the amount and service fee (if used). Press **Enter**.
7. Upon approval, a merchant receipt will print.
8. Press F1 to print a customer copy or F2 for no customer copy.



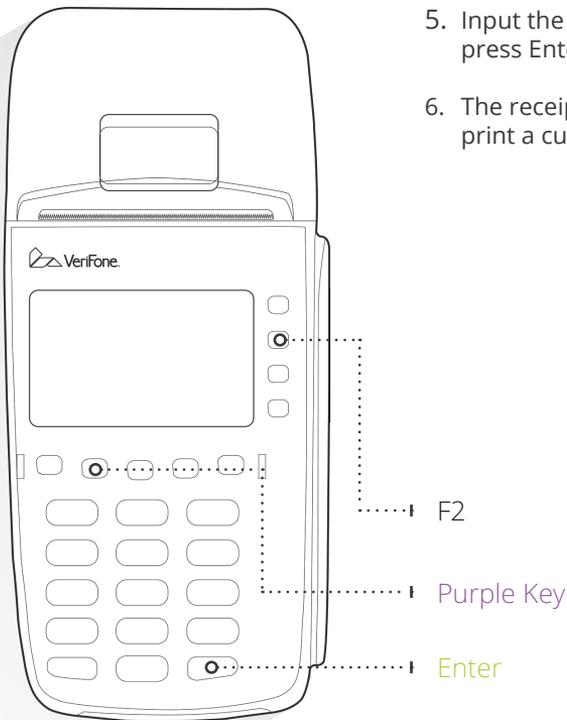
Manual Keyed Entry Sale



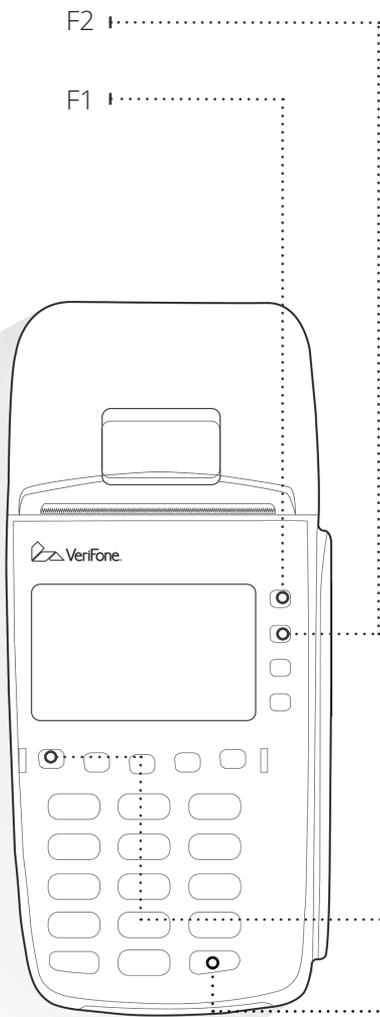
1. Press F2 for credit or F3 for debit
2. Select SALE
3. Input the amount and press **Enter**.
4. Press the **Red "X" Key**. The screen will momentarily say "Operation canceled." However, this does not affect any functionality and you will be directed to the sale screen.
5. Input the card number and Press **Enter**.
6. Input the expiration date (MMYY) and press **Enter**.
7. Input the 3-4 digit CVV code found on the card and press **Enter**.
8. Input the zip code of the card holder and press **Enter**.
9. Input the optional identifier(s) and press **Enter**.
10. A screen will appear with the amount and service fee (if used). Press **Enter**.
11. Upon approval, a receipt will print. Press F1 to print a customer copy.

Refund

1. Press F2 for credit card.
2. Select REFUND.
3. Enter the amount and press **Enter**.
4. Swipe, dip or manually input the credit card number. Press **Enter**
 - a. If the credit card number was manually entered, input the credit card expiration date (MMYY) and press **Enter**.
5. Input the terminal password and press Enter.
6. The receipt will print. Press F1 to print a customer copy.



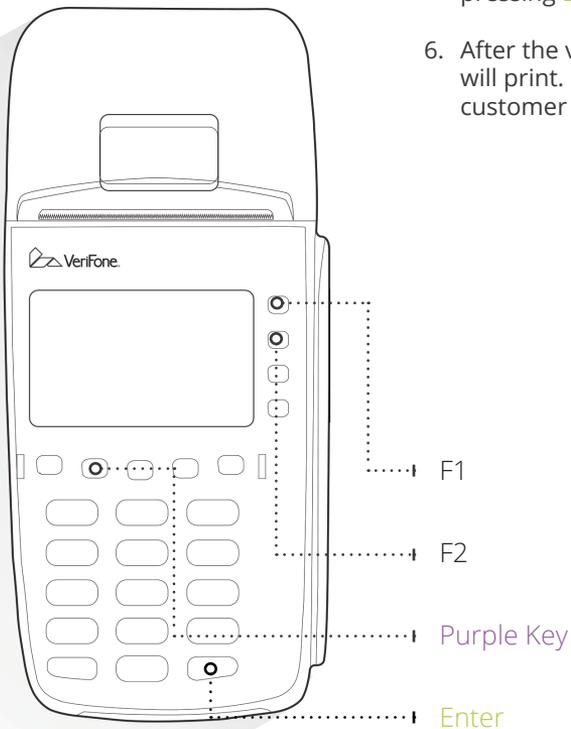
Forced Sale



1. Press F2 for credit card.
2. Select FORCE.
3. Swipe, dip or manually input the credit card number. Press **Enter**
 - a. If the credit card number was manually entered, input the credit card expiration date (MMYY) and press **Enter**.
4. Input the terminal password and press **Enter**.
5. Input the auth code provided by your credit card processor. Press **Enter**.
6. Input the amount and press **Enter**.
7. Input any optional identifier(s) (parcel number, etc.) and press **Enter**.
8. A screen will appear with the amount and service fee (if used). Press **Enter**.
9. Upon approval, a receipt will print. Press F1 to print a customer copy.

Void

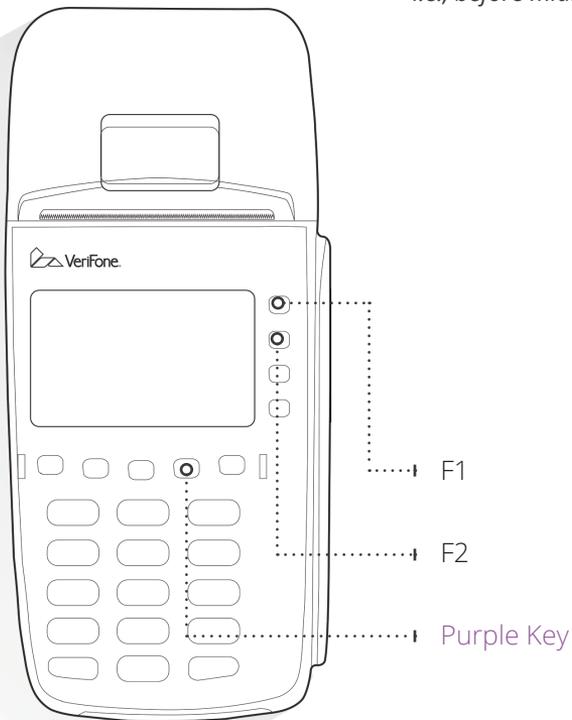
1. Press F2 for credit card.
2. Select VOID.
3. Input the sequence number from the receipt and press **Enter**.
4. Input the void password and press **Enter**.
5. The voided transaction amount will be displayed. Complete the void by pressing **Enter**.
6. After the void is approved, a receipt will print. Press F1 to print the customer copy.



Reprint Receipt

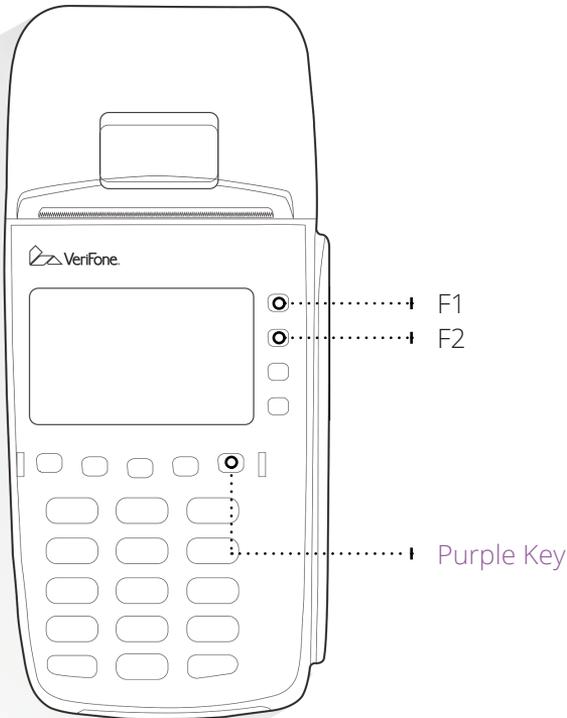
1. Press the Reprint Key. It is the second **Purple Key** from the right.
2. Press F1 to reprint the last transaction or Press F2 to reprint a transaction by sequence number (found on the receipt).
3. Select Merchant Copy (F1) or Customer Copy (F2).

Note: This can only be done the same day, i.e., before midnight.



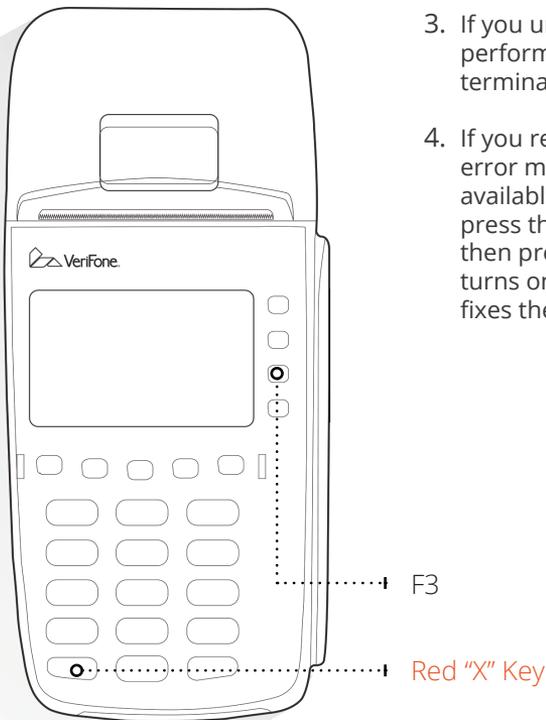
Print Reports

1. Press the Report Key (the rightmost Purple Key).
2. For a summary report of the total sales amount and service fee totals, if applicable, press F1.
3. For a detailed report of each transaction, including items like the transaction type, card type, last four of the account number and amount, press F2.



Troubleshooting Tips

1. If the terminal cannot connect, check the Ethernet cable to ensure that it is connected to the portal on the bottom of the terminal labeled ETH.
2. If you get interrupted after you start the transaction and can't remember where you are, press the Red "X" Key and start the transaction over. Once you receive an approval code, you cannot hit the Red "X" Key.
3. If you unplug the terminal to perform a hard re-start, plug the terminal back in and press F3 Forte.
4. If you receive either of the following error messages: "Application not available" or "Enter PIN number," press the leftmost Purple Key and then press F2 for EMV Init. This turns on the EMV application and fixes the errors.



FAQs

Technical Support

equipmentquestions@forte.net

866.290.5400 Option 5

M-F: 7AM – 7PM Central

Feel free to reach out to our Technical Support team for troubleshooting steps, technical issues, missing equipment and terminal-related support.

Q: Is there a way I can scan checks?

A: You have a couple of options. You can either manually enter the checking account information or purchase an optional check reader.

Q: How can I input the PIN for debit cards?

A: Forte does not support PIN-based transactions. The debit option is only available for use with VISA debit cards for those merchants participating in the VISA debit program.

Q: I've run out of paper. Where can I get more?

A: Send an email request for more paper to order@forte.net.

Q: I am getting the message "Send Error" when I run a transaction. What do I do?

A: Your terminal is either not properly configured or not properly connected.

Q: When does the terminal batch itself out?

A: The terminal batches itself out at midnight each night. Please visit www.forte.net/resources for answers to additional FAQs.

FAQs (cont.)

For the following questions, please contact us at 866.290.5400 Option 5 for assistance.

Q: The terminal has paper, but it won't print or is unreadable.

Q: The receipt has incorrect information. How do I change it?

Q: How do I change the date and time on the terminal?

* For questions related to account changes, transactions, reporting and funding/billing, please contact Customer Service at 866.290.5400 Option 1.

Terminal Packaging List

- One VeriFone VX 520 device
- One power cable
- One thermal paper roll
(2/14 in. by 50 ft.)
- One VeriFone VX 520 Declaration
of Conformity

Additional Information

Equipment Issues

For assistance with equipment issues, see the information sticker on the bottom of your device. If the sticker is not present, call Technical Support at 866.290.5400 Option 5.

Internet Failure & Voice Authorization

For assistance with equipment issues, see the information sticker on the inside of the back cover of your device.

Technical Support

equipmentquestions@forte.net
866.290.5400 Option 5
M-F: 7AM – 7PM Central

Customer Service

customerservice@forte.net
866.290.5400 Option 1
M-F: 7AM – 7PM Central

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