

Use Invoice4U with Virtual Terminal

Overview

Invoice4U payment documents will be available in Virtual Terminal after the service is [activated](#) by Verifone.

The payment documents will be generated automatically after the transaction is captured and will be sent to the shopper's mailbox. For each transaction, the details regarding the payment document will be available in your Verifone Central account.

Availability

Invoice4U via Virtual Terminal is available for Merchant Cashier and Merchant Supervisor roles.

Workflow

1. Log in to your Verifone Central account.
2. Navigate to the **Payment Tools** tab and click on the **Virtual Terminal** section from the drop-down menu.
3. Fill in the **Payment Settings** page with your **Organization** information, **Payment Provider Contract**, **Transaction type**, and **Authorization Type**.
4. Go to the **Payment Documents** section which details the following mandatory fields:

Payment Documents

Payment document provider

 ✕ ▼

Document Type

 ✕ ▼

Document will be sent to the customer automatically

Payment document language

 ✕ ▼

Document subject (Optional)

Max 200 characters

- **Payment document provider** - Select which Invoice provider you want to use for this transaction. You can choose:
 - **None** - if you do not wish to generate a commercial document for this transaction
 - **Invoice4U** - if you want to generate a commercial document for this transaction

Payment document provider



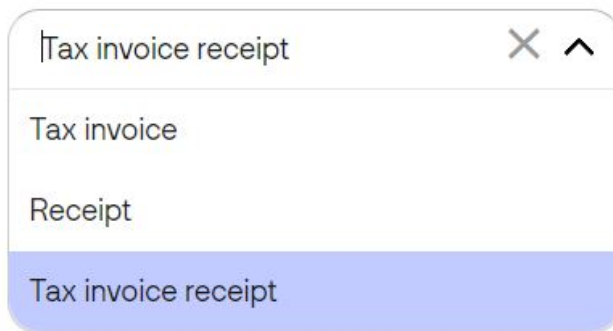
Invoice4U

Invoice4U

None

- **Document Type** - If you select *Invoice4U*, the following options will become available:
 - Tax Invoice
 - Receipt
 - Tax Invoice Receipt

Document Type



Tax invoice receipt

Tax invoice

Receipt

Tax invoice receipt

- **Payment document language** - Select Hebrew or English.

Payment document language



Hebrew

English

Hebrew

- **Document subject** (Optional field) - where the merchant can specify a general description of the document (a maximum of 200 characters are allowed), which is not necessarily reflected in the line items. Such subjects can be "Monthly subscription", "Invoice for services rendered", etc. The *Document subject* field corresponds to the `sales_description` field from [Checkout API](#).

Document subject (Optional)

Max 200 characters

5. Go to the **Customer Details** section and fill in the specific information (First name/Last name/ Email address - used to send the payment document).

Customer details

First name

Used on the payment document

Last name

Used on the payment document

Email address

Used to send the payment document

Tax identification number (Optional)

6. Go to the **Transaction Settings** section. Several workflows are possible here:
 - **Without line items** - If the **Receipt** document type is chosen in the *Payment Documents* section, the transaction amount is required while the line items are not.

Document Type

 X v

Document will be sent to the customer automatically

Payment document language

 X v

Document subject (Optional)

Max 200 characters

Amount

 v

- **With line items** - If the **Tax invoice** and **Tax invoice receipt** document type is chosen, the line items are required.

Transaction Settings

Tax settings

- Use the Invoice4U tax settings
 Add custom tax

Product Information

Product description

| | | |
|------------------------|--------------------------------|-------------------------|
| Quantity | Price per unit | Product Code (Optional) |
| 2 <input type="text"/> | ILS <input type="text"/> 10.00 | <input type="text"/> |
| Total Price | | ILS 20.00 |

7. Go to **Tax settings**. When selecting payment documents with line items for **Tax invoice** and **Tax invoice receipt**, the following two radio button options will be available:
- **Invoice4U tax settings** - the default tax settings set in your Invoice4U account will be applied to your products. Set the *Product description*, *Quantity*, *Price per unit* (tax included), and the optional stock keeping unit ID (*Product Code*). Use the **Add Product** button to add additional product lines.
 - **Add custom tax** - where in addition to the aforementioned details, you can also specify per product line item, by selecting from the **VAT** toggle button, whether it is **taxable** (with current value of 18%, as per Israeli VAT) or **exempt** (0% tax rate).

Transaction Settings

Tax settings

- Use the Invoice4U tax settings
 Add custom tax

Product Information

Product description

| Quantity | Price per unit | Product Code (Optional) |
|------------------------|--------------------------------|-------------------------|
| 2 <input type="text"/> | ILS <input type="text"/> 10.00 | <input type="text"/> |

VAT

| | |
|----------------------------|------------------|
| Product Total | ILS 16.95 |
| VAT Total (18% VAT) | ILS 3.05 |
| Total Price (w/VAT) | ILS 20.00 |

Add Product

- After adding your products, click on the **Continue to Payment** button.
- Complete your *Payment Form* with Credit card information and click the **Pay** button.
- The **Payment Completed** page with information on your Transaction will now show up.