TOKEN MANAGEMENT PORTAL (TMS)

Managing Tokens In The Cybersource Business Portal

The Recurring Billing/Secure Storage function will no longer be in the Virtual Terminal menu. You should now see Token Management Service (TMS) option in your Dashboard.

The TMS menu can be used to make on-demand token payments as you were able to do with the old "Recurring Billing" feature.

Please see below instructions on how to Create A New Token.

1. **On the left navigation pane, click Token Management then Customers.**
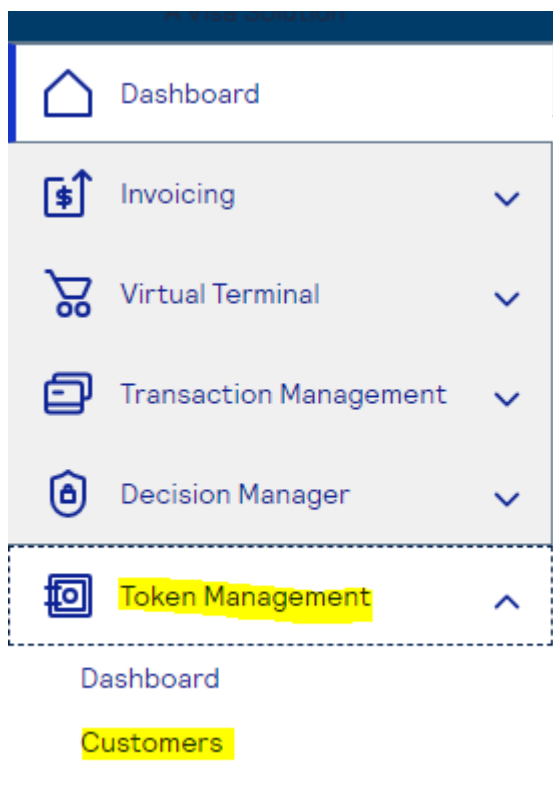
2. **Once the customers page appears, click Create token.**

3. **The Create Customer page opens.**

•   **Under Customer Details, enter:**

    a. **Reference: a name for the customer token**

    b. **Email: email address for the customer**

    c. **Description: description of the customer token**

•   **Under Payment Information, enter:**

    d. **Currency**

    e. **Payment Type**

    f. **Account Information for the selected payment type**

Note: The default currency will display in USD as Cybersource is a US based platform and you'll need to update the currency to AUD each time. Unfortunately, the default currency cannot be updated at this time.

- **Enter the billing information for the customer.**

Billing Information   ▲

First Name *		Last Name *	

Company

Street Address 1 *   Street Address 2

City *   State/Province *
                                                      Select an option   ⌄

Postal Code *   Country *
                                                      United States   ⌄

Phone Number   Email *

- **Enter the shipping information for the customer. If it is the same as billing information, check the Same as Billing Information box. (Optional) Enter any merchant-defined data fields.**

Shipping Information   ▲

☐ Same as Billing Information

First Name *   Last Name *

Company

Street Address 1 *   Street Address 2

City *   State/Province *
                                                      Select an option   ⌄

Postal Code *   Country *
                                                      United States   ⌄

Phone Number   Email *

Merchant-Defined Data Fields   ▲

Merchant-Defined 1   Merchant-Defined 2

Merchant-Defined 3   Merchant-Defined 4

4. **Click Save**

You can view subscription details, including payment history and the next Scheduled Payment. Use these Filters to search for subscriptions:

- **Date Range**
- **Card Expiration**

- **Email**
- **Card Number**
- **Token ID**
- **Postal Code**
- **First and Last name**
- **Account Number**
- **Merchant Reference Number**

Note: All the old tokens are there as they were under the TMS menu and can be searched using the filter as long as the information matches. Then a payment can be made as shown below.

1. **To search for a Token. On the left navigation pane, click Token Management then Customers.**
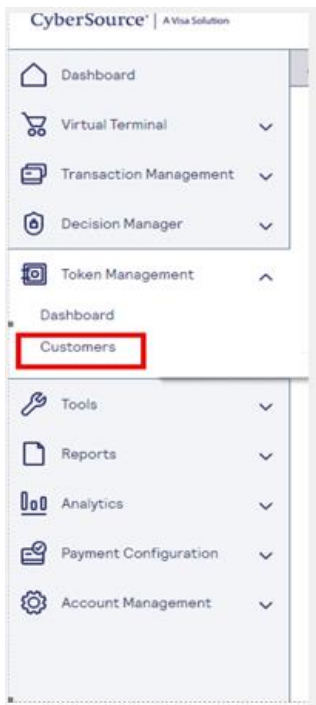
2. **In the Customers page, click on the "***New Filter***" dropdown menu next to "***Search Filters***". From the list, select one of the options appropriate for your search.**
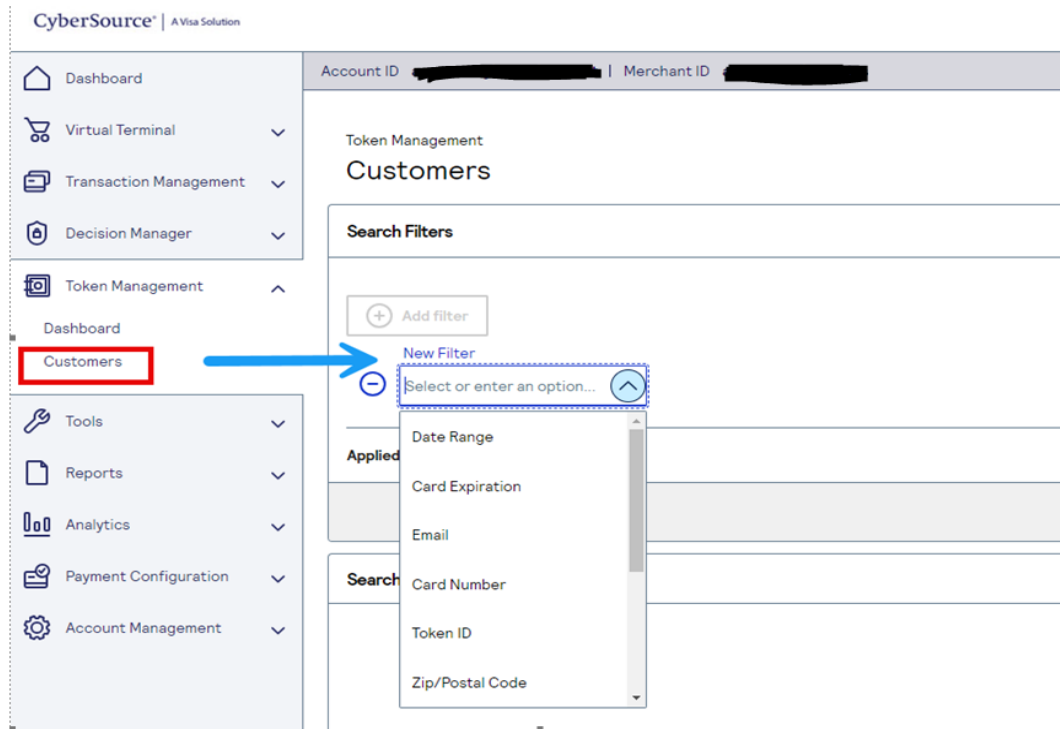
3. **The Token ID will populate in the search results. Click on the blue hyperlink (Point 4 from the image below) of the Token ID to view the detailed customer and token information.**
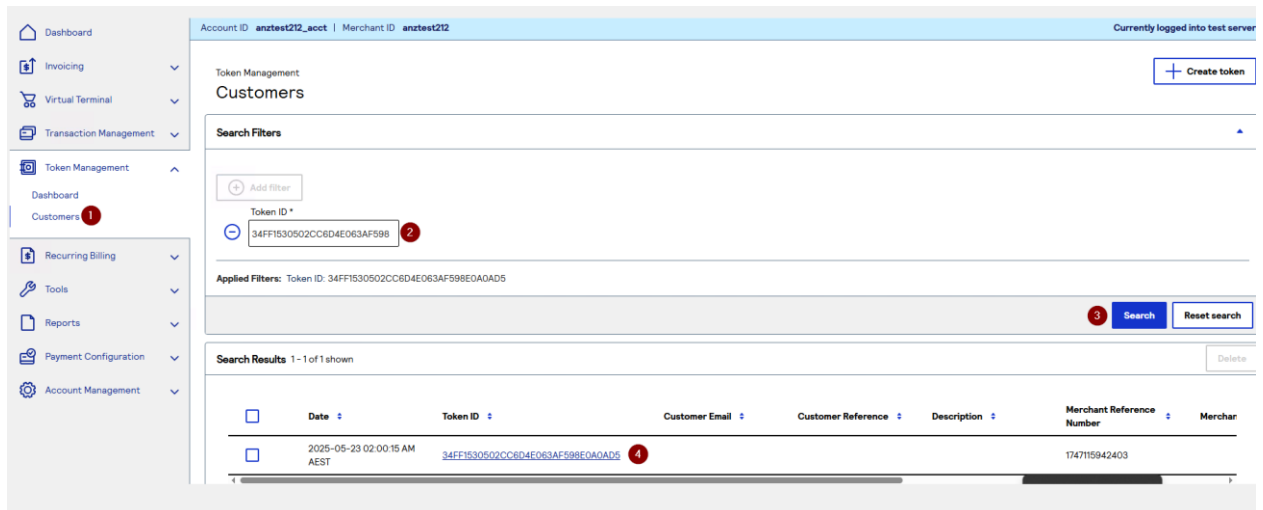
4. **The token information section offers several management options. You can click on the "More Actions" button (represented by the three dots) next to the token details to access options such as editing or deleting the token. Additionally, within the Payment Methods section, you can click on the Token ID (highlighted in blue / Point 5) to view more details about that specific token. This allows for easy verification and management of your stored payment methods.**

5. **From here, you can see the Payment Instrument Token along with the Payment history and other available options, such as** *Make Payment (Point 6), Edit Payment Instrument***, or** *Delete Token***.**

   As shown in the image below, in the Payment Information section, the Instrument Identifier is a unique code that helps you retrieve or identify the last 4 digits of the customer's card if needed for reference or verification purposes.

Select "No" for the question "*Is this a cardholder initiated transaction?*" to indicate a Merchant Initiated Transaction where the CVV is not required. Once you select "No," the "*Select a Reason*" dropdown will appear. Choose the appropriate reason from the list (such as Resubmission, Delayed Charges, Reauthorisation, No Show, or Incremental). After completing these steps, click "Proceed" to continue.

Make a Payment for this Token

Token ID:
34FF1530502BC6D4E063AF598E0A0AD5
Is this a card holder initiated transaction?

| Yes | No ✓ | 7 |

Select a Reason * 8

Select an option ∧

Resubmission

Delayed Charges

Reauthorization

No Show

Incremental

Cancel

● ACTIV

AUD

6. **The Virtual Terminal - One Time Payment page will open, showing the Order Details, Billing/Shipping Information, and Payment Details.**

ANZ WORLDLINE Payment Solutions

Account ID anztest212_acct | Merchant ID anztest212

Virtual Terminal
One-Time Payment

Customer Presence

ⓘ Information: Use the One-Time Payment page to process cardholder-initiated transactions.

* = Required

Mode :
Card Not Present

Order Details ⑨   ▲

Transaction Type *
[Sale   ▾]

Currency
[Australia: Dollar   ▾]

Amount *
[   ]

Merchant Descriptor
[   ]

Order or Merchant Reference Number
[   ]

Comments
[   ]

Billing Information

Customer ID
[   ]

First Name *
[JOHN   ]

Last Name *
[CENA   ]

Company
[   ]

Street Address 1 *
[collins street   ]

Street Address 2
[   ]

Total: AUD 0.00

7. **Fill in the required details marked with an asterisk (*) and then click on the 'Submit' button to complete the payment.**

   Please note that under the 'Payment Information' section, the 'Card Number' and 'CVV' fields will be greyed out, as the card has been tokenised and these details are securely stored.

8. **The system will process the payment and display the result on the same page. You will see whether the payment was successful or declined (Point 11), and a unique Request ID will be generated for that transaction. You can click on the Request ID (blue hyperlink / Point 12) to view the transaction information in Transaction Management.**

Instructions on processing a Virtual Terminal – One Time Payment transaction and creating a token:

1. On the left navigation pane, click *Virtual Terminal* then One Time Payment.
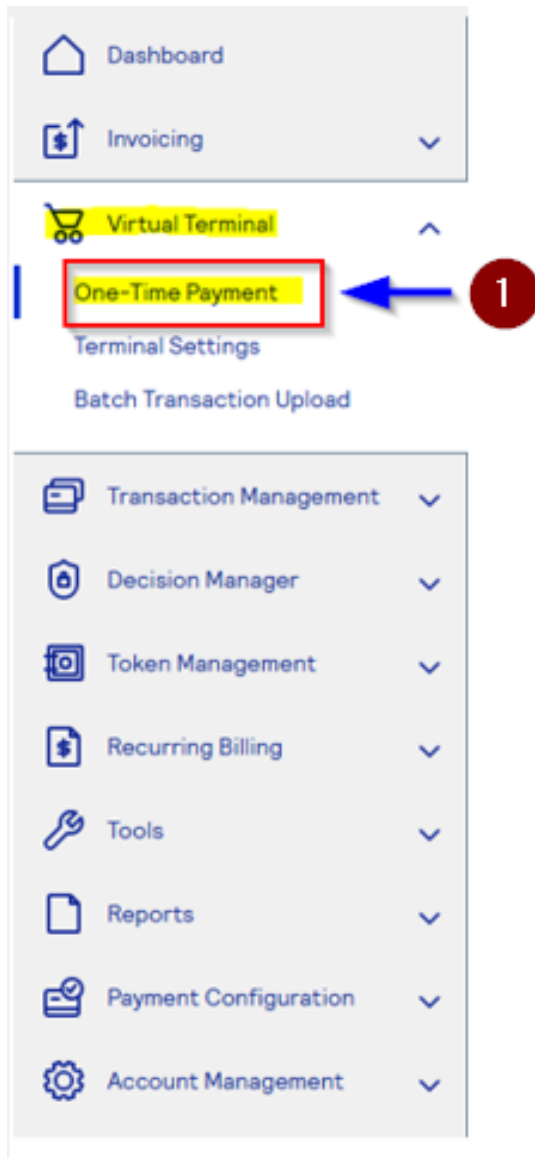
2. **Once the One-Time Payment page appears, enter the Order Details, Billing Information and Shipping Information (if different to the Billing Information).**

Order Details ② ▲

Transaction Type *
Sale ⌄

Currency
Australia: Dollar ⌄

Amount *

Merchant Descriptor

Order or Merchant Reference Number

Comments

Billing Information

Customer ID

First Name *

Last Name *

Company

Street Address 1 *

Street Address 2

City *

State *

Zip/Postal Code

Country
Select the Country ⌄

☐ Ignore AVS Results

Phone Number

Email Address

☐ Shipping information same as billing

Enter the Payment Information and tick these 2 boxes and fill out the *Subscription Information*.

3. **Click Submit.**