

TOKEN MANAGEMENT PORTAL (TMS)

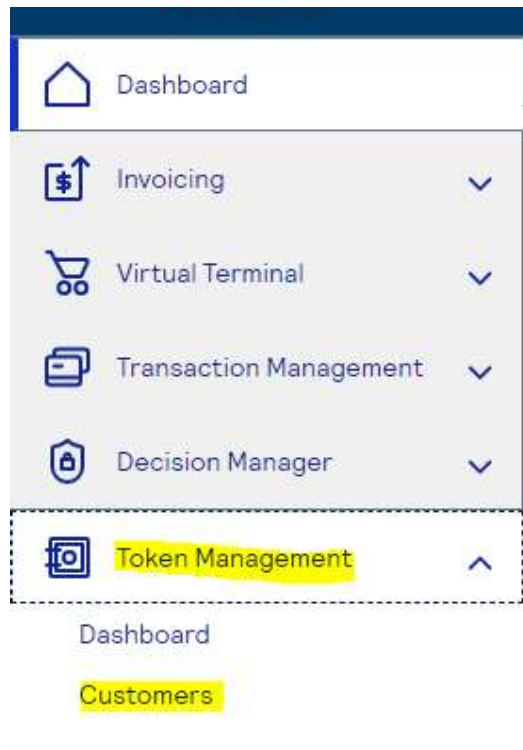
Managing Tokens In The Cybersource Business Portal

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.

Token Management

Customers + Create token

Search Filters

+ Add filter

New Filter

Select or enter an option... ▼

Applied Filters: No filters applied

Search Reset search

Search Results 0 results shown

3. The Create Customer page opens.

- Under Customer Details, enter:
 - Reference: a name for the customer token
 - Email: email address for the customer
 - Description: description of the customer token

Token Management

Create Customer

Fields marks with * are required.

Customer Details

Customer Reference *

Email

Description

Merchant Reference Number

- Under Payment Information, enter:
 - Currency
 - Payment Type
 - Account Information for the selected payment type

Payment Information

Payment Type

Credit Card ✓ Check

Currency

United States (USD) ▼

Credit Card Number *

Expiration Date *

May / 2025 ▼

Credit Card Type *

Visa ▼

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

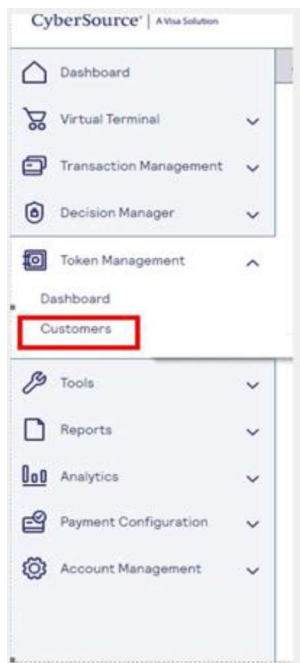
You can view subscription details, including payment history and the next Scheduled Payment. Use these Filters to search for subscriptions:

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

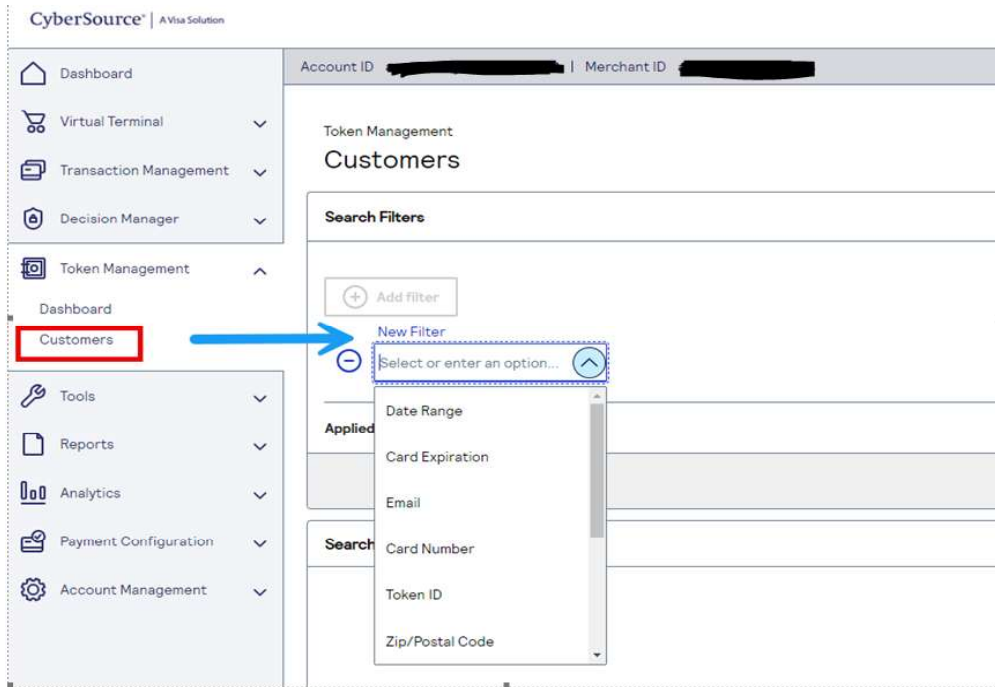
- Email
- Card Number
- Token ID
- Postal Code
- First and Last name
- Account Number
- Merchant Reference Number

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.

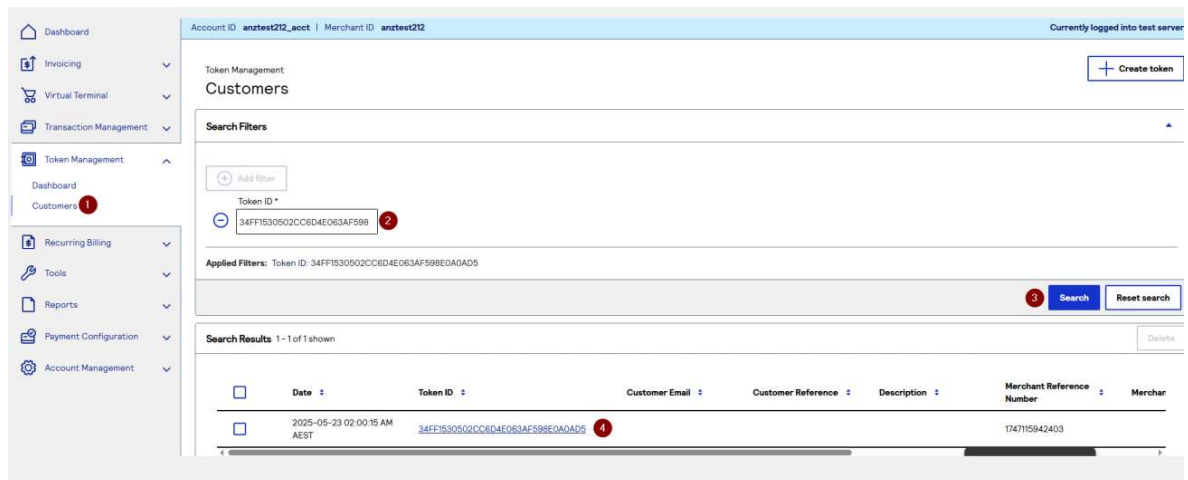
1. To search for a Token. On the left navigation pane, click Token Management then Customers.



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.

Token Management / Customers

Customer Details

Reference: 34FF1530502CC6D4E063AF598E0A0AD5

Customer Information	
Customer Reference:	Email:
Description:	Merchant Reference Number: 174715942403

Payment Methods

Edit	More Actions	Token ID	Primary	First Name	Last Name	Account Number	Expiration	Em
		Press Enter to filter by Token ID		Press Enter to filter by Fir	Press Enter to filter by Las	Press Enter to filter by Acc	Press Enter to filter by Exp	Pr
		34FF1530502CC6D4E063AF598E0A0AD5	Primary	JOHN	CENA	41111XXXXXX1111	05/2028	nu

Add payment method

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.

Account ID: anutes1212_sct | Merchant ID: anutes1212

Token Management / Customers

Customer Details

Reference: 34FF1530502CC6D4E063AF598E0A0AD5

Customer Token: 34FF1530502CC6D4E063AF598E0A0AD5 / Payment Instrument Token: 34FF1530502CC6D4E063AF598E0A0AD5

Make payment Edit payment instrument Delete token

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Billing Information	
Name:	JOHN CENA
Address:	colins street
City:	Melbourne
State:	
Postal Code:	N/A
Country:	Australia
Email:	nu@cyber source.com
Phone:	
Company:	

Payment Information	
Account Number:	41111XXXXXX1111
Expiration Date:	05/2028
Instrument Identifier:	703000000045668111
Status:	Active
Payment Account Reference:	
Currency:	AUD

The Instrument Identifier is now how you would retrieve the last 4 digits of the customer's card

Payment History				
Application	Request ID	Amount	Date and Time	Merchant Reference Number
Success, Credit Card Settlement	747966003149328704503	10.00 AUD	2025-06-23 12:06:43 PM AEST	1747966003124
Success, Credit Card Authorisation				
Success, Credit Card Settlement	74796594268761025404306	10.00 AUD	2025-06-23 12:05:42 PM AEST	1747965942680
Success, Credit Card Authorisation				

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

● ACTIVE

AUD

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

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

Amount *

Merchant Descriptor

Comments

Currency
Australia: Dollar

Order or Merchant Reference Number

Billing Information

Customer ID

First Name *
JOHN

Company

Street Address 1 *
collins street

Last Name *
CENA

Street Address 2

Total: AUD 0.00

- 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.

Payment Information

Payment Type

Credit Card

Transaction Source *

MOTO - Mail/Phone Order

Credit Card Number *

XXXXXXXXXXXX1111

Expiration Date *

May / 2028

Credit Card Type *

Visa

CVV

Total: AUD 0.00

Submit

Cancel

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.

Success: Transaction successfully submitted for processing.

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Virtual Terminal / Online Payment

New transaction

Transaction Summary

Transaction Details

The unique Transaction ID below has been created. This ID and your transaction are both now viewable in Transaction Search. Transaction ID [7482220039986506204501](#)

Return Codes

Request ID

[7482220039986506204501](#)

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Result Code

SCM - Request was processed successfully.

Authorization Code

831000

AVS Result

Y - Match: address and 5-digit postal code match.

Order Details

Description

Thanks for your payment!!!

Transaction Amount (inclusive of all taxes and charges)

10.00 AUD

Shipping Information

JOHN CENA
collins street
Melbourne, VIC N/A
AU

Customer Information

Name

JOHN CENA

Email Address

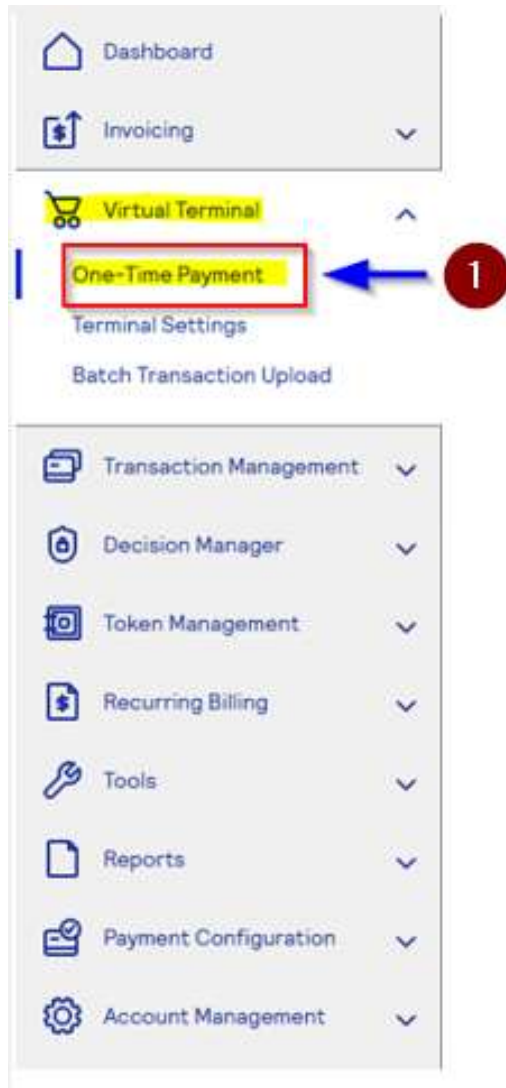
nuli@cybersource.com

Billing Information

JOHN CENA
collins street
Melbourne, VIC N/A
AU

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

Amount *

Merchant Descriptor

Comments

Currency
Australia: Dollar

Order or Merchant Reference Number

Billing Information

Customer ID

First Name *

Company

Street Address 1 *

City *

State *

Zip/Postal Code

Country
Select the Country

Phone Number

Email Address

Last Name *

Street Address 2

☐ Ignore AVS Results

☐ Shipping information same as billing

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

Payment Information 3

Payment Type

Credit Card

Transaction Source *

MOTO - Mail/Phone Order

Credit Card Number *

Expiry Date *

May / 2025

Credit Card Type *

Select card type

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☐ Use payment details to create more transactions

☐ Cardholder agrees to save the payment instrument for later use

3. Click Submit.

☒ Use payment details to create more transactions

Subscription Information 5

Subscription Type

Create Token Only

Title

Default Amount

☒ Cardholder agrees to save the payment instrument for later use

Total: AUD 0.00

6 Submit Cancel