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Document name:  
**Order Form Quick Reference Guide**

Date:  
**28<sup>th</sup> May 2020**

Page number:  
**1**

Version:  
**1.3**



## **Order Form Quick Reference Guide**

**V1.3**

**May 2020**

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## 1. VERSION CONTROL

### 1.1. Current Version

Date	Version	Status	Editor	Comment
28th May 2020	1.3	Final	L Connell	Final Version 2
24 <sup>th</sup> April 2020	1.2	Final	Stuart Lester	Final Version
23 <sup>rd</sup> April 2020	1.1	Final Draft	Stuart Lester	Final Draft Review

### 1.2. Change History

Date	Version	Status	Editor	Comment
23 <sup>rd</sup> April 2020	1.0	Review	Stuart Lester	Draft

## 2. Document Purpose

The new Verifone Order Form has been created to simplify the order process. The electronic Adobe form has been designed to make the ordering experience seamless and more accessible. This quick reference guide (QRG) will direct you through the completion of the new form.

**NB:** Please note – hovering over fields on the new order form will also provide Tool Tips to -be used in completing the form as a further guide.

## 3. Select your “Terminal” Order Type

### Step 1: Order Type

<b>Order Type</b>	New Order: <input type="checkbox"/>	Additional Order: <input type="checkbox"/>
	Upgrade: <input type="checkbox"/>	Renewal: <input type="checkbox"/>

## 4. Capturing Customer Details

Fields highlighted in red on the form denote a mandatory field and must be completed. In addition, checkboxes when selected will hide the alternative option/s for the avoidance of doubt.

### Step 2: Customer – Billing and Contact Details

Legal Name:	<input type="text"/>		
Trading Name the same as Legal Name?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Trading Name:	<input type="text"/>
Are you a Registered Company?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Registration Number:	<input type="text"/>
Company Type:	<input type="text" value="Select"/>	VAT Number:	<input type="text"/>
Are you VAT Registered?	<input type="checkbox"/> Yes <input type="checkbox"/> No	End User Name:	<input type="text"/>
End User Name:	<input type="text"/>	Contract Partner Name:	<input type="text"/>

### Billing Details

Existing Customer?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Bill-To Customer Number:	<input type="text"/>		
Address 1:	<input type="text"/>	City:	<input type="text"/>	Postcode:	<input type="text"/>
Address 2:	<input type="text"/>	Country:	<input type="text" value="Select"/>		
<b>Primary Bill-to Customer Details</b> - This is the person who will be contacted regarding any billing issues					
First Name:	<input type="text"/>	Last Name:	<input type="text"/>		
Phone:	<input type="text"/>	Electronic Invoice Email:	<input type="checkbox"/>		
Contact Email:	<input type="text"/>	Electronic Invoice Email:	<input type="text"/>		

### 5. Shipping/Delivery Information

Selecting “Yes” to the shipping details section will auto-populate the fields if the shipping and billing details are the same. Selecting “No” allows for alternative details to be inserted.

#### Shipping Details - This is where your terminals will be delivered to (please do not submit PO Box address)

Are ship-to and Bill-to the same? <input type="checkbox"/> Yes <input type="checkbox"/> No		City: <input type="text"/>	Postcode: <input type="text"/>
Address 1: <input type="text"/>		Country: <input type="text" value="Select"/>	
Address 2: <input type="text"/>			
<b>Primary Ship-to Customer Details</b> - Main contact for this delivery			
First Name: <input type="text"/>	Last Name: <input type="text"/>		
Phone: <input type="text"/>	Email: <input type="text"/>		
The person named above will receive the P2PE email when devices are dispatched.			

### 6. Products & Solutions

Products and solutions can be selected by way of dynamic dropdown fields. These are designed to filter the available selections to enable specific and appropriate options to be selected, simplifying the available choices.

Options are driven dynamically through the selection of the “Customer Type” and “Purchase Type” fields.

#### Step 3: Products & Solutions

Will this order include devices? <input type="checkbox"/> Yes <input type="checkbox"/> No	<i>If your order is for a load/reload or additional account only please select 'No'</i>				
Customer Type: Please select Customer Type you fall into:	<input type="text" value="Select..."/>				
Purchase Type: Purchase or Rental?	<input type="text" value="Select..."/>				
Term Length:	<input type="text" value="Select..."/>	Billing Frequency:	<input type="text" value="Monthly"/>		
Device Selection					
Product	Product Type	Product Name	Product Code	Quantity	Price
<input type="text" value="Select..."/>	<input type="text" value="Select..."/>	N/A	N/A		
<input type="text" value="Select..."/>	<input type="text" value="Select..."/>	N/A	N/A		
<input type="text" value="Select..."/>	<input type="text" value="Select..."/>	N/A	N/A		
				0.00	

- Quantity & Price fields will become mandatory once a product(s) is selected. Total is auto calculated.

## 7. Service & Warranty

The Service & Warranty section along with the Set-up Fee and Ad-Hoc Requests 1 & 2 fields are also driven by the “Customer Type” & “Purchase Type” selections, however, can be completed without the need to select other products in Section 3 above.

### Step 4: Service & Warranty

IF YOU HAVE CHOSEN A RENTAL MODEL YOU DO NOT NEED TO COMPLETE THE SERVICE BOX – BUT WARRANTY MAY STILL BE APPLICABLE			
Service Contract Term: <input type="text" value="Select..."/>	Service Type: <input type="text" value="Select..."/>	Product Code: N/A	
Quantity: <input type="text"/>	Price: <input type="text"/>	Total: 0.00	Billing Frequency: <input type="text" value="Select..."/>
Warranty Term: <input type="text" value="Select..."/>	Warranty Type: <input type="text" value="Select..."/>	Product Code: N/A	
Quantity: <input type="text"/>	Price: <input type="text"/>	Total: 0.00	Billing Frequency: <input type="text" value="Select..."/>
All purchased Verifone devices ship with a standard 12-month warranty at no additional charge			
<i>Description: Setup fee includes the setup of the terminal onto the Ocius gateway and the cost of delivery, there is one setup fee per terminal</i>			
Setup Fee: <input type="text" value="Select..."/>	Product Code: N/A	Quantity: <input type="text"/>	Price: <input type="text"/>
Total:			0.00
Ad-Hoc Requests 1: <input type="text" value="Select..."/>	Product Code: N/A	Quantity: <input type="text"/>	Price: <input type="text"/>
Ad-Hoc Requests 2: <input type="text" value="Select..."/>	Product Code: N/A	Quantity: <input type="text"/>	Price: <input type="text"/>
Total:			0.00

## 8. System Information

This section allows for the inclusion of existing system ID information to be inserted where applicable. If the “Existing System ID” checkbox is selected it will set the Existing System ID field to mandatory.....

## 9. Installation Advice & P2PE Email Address

This is a mandatory section to ensure the sending of the P2PE support information relating to orders is sent to the applicable email address in connection with the order placed.

## 10. Finalising Your Order

This section now includes the ability to sign the order form using a digital signature to enable the form to be submitted electronically.

### Step 8: Finalise the Order

Bill-to currency for this order: GBP <input type="checkbox"/> USD <input type="checkbox"/> EUR <input type="checkbox"/>	<i>The currency in which you will be invoiced (this is unrelated to the currencies available on your card machine)</i>
Do you have a Contract ID? <input type="checkbox"/> Yes <input type="checkbox"/> No	Contract ID: <input type="text"/>
Term Start Date: <input type="text"/>	
Are Invoices paid by PO Only? <input type="checkbox"/> Yes <input type="checkbox"/> No	PO Number: <input type="text"/>
First Name: <input type="text"/>	Last Name: <input type="text"/>
Position Held: <input type="text"/>	
Second Signatory Required on this Order Form? <input type="checkbox"/> Yes	
Signature: <input type="text"/>	Date: <input type="text"/>
<small>If a valid contract ID is not provided, this order is subject to Verifone’s Standard Terms and Conditions (Form: STC 2.1 – October 2017) - link: - <a href="https://goo.gl/dkUjst">https://goo.gl/dkUjst</a> Please tick the box below to confirm that you accept Verifone’s Standard Terms and Conditions, a copy of which can be found here [insert link] or a copy be provided on request.</small>	
Accept Verifone’s Standard Terms and Conditions <input type="checkbox"/>	

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## 11. Digitally Signing Your Order

Sign with a Digital ID

Choose the Digital ID that you want to use for signing: Refresh

? Configure New Digital ID Cancel Continue

- Select Configure New Digital ID
- Configuring Digital ID for Signing

Configure a Digital ID for signing

A Digital ID is required to create a digital signature. The most secure Digital ID are issued by trusted Certificate authorities and are based on secure devices like smart card or token. Some are based on files.

You can also create a new Digital ID, but they provide a low level of identity assurance.

Select the type of Digital ID:

- Use a Signature Creation Device  
Configure a smart card or token connected to your computer
- Use a Digital ID from a file  
Import an existing Digital ID that you have obtained as a file
- Create a new Digital ID  
Create your self-signed Digital ID

? Cancel Continue

- Select the “Create a new Digital ID” option and click continue
- Save to File

Select the destination of the new Digital ID

Digital IDs are typically issued by trusted providers that assure the validity of the identity. Self-signed Digital ID may not provide the same level of assurance and may not be accepted in some use cases.

Consult with your recipients if this is an acceptable form of authentication.

- Save to File  
Save the Digital ID to a file in your computer
- Save to Windows Certificate Store  
Save the Digital ID to Windows Certificate Store to be shared with other applications

? Back Continue

- Select the “Save to File” option and click continue. Alternatively, if preferred, you can save the Digital ID to your Windows Certificate Store on your local machine

- Digital ID Details

### Create a self-signed Digital ID

Enter the identity information to be used for creating the self-signed Digital ID.

Digital IDs that are self-signed by individuals do not provide the assurance that the identity information is valid. For this reason they may not be accepted in some use cases.

Name	<input type="text" value="Name"/>
Organizational Unit	<input type="text" value="Department"/>
Organization Name	<input type="text" value="Company Name"/>
Email Address	<input type="text" value="Company@.com"/>
Country/Region	<input type="text" value="GB - UNITED KINGDOM"/>
Key Algorithm	<input type="text" value="2048-bit RSA"/>
Use Digital ID for	<input type="text" value="Digital Signatures"/>

Email address is not valid

- Insert Digital ID information and click continue

- Digital ID Password

### Save the self-signed Digital ID to a file

Add a password to protect the private key of the Digital ID. You will need this password again to use the Digital ID for signing.

Save the Digital ID file in a known location so that you can copy or backup it.

Your Digital ID will be saved at the following location :

Apply a password to protect the Digital ID:

Confirm the password:

- Add a password for the Digital ID and click save
- Please remember the password so you can reuse the digital signature on future orders where applicable Pre-existing Digital Signature

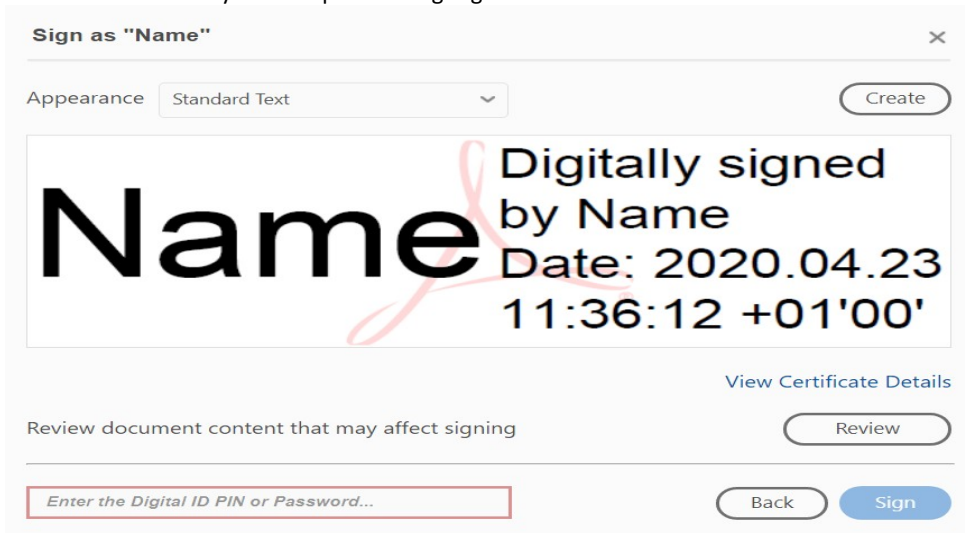
### Sign with a Digital ID

Choose the Digital ID that you want to use for signing:

-  **Name** (Digital ID file)  
Issued by: Name, Expires: 2025.04.23



- Alternatively select a pre-existing Digital ID and click continue



- Insert the pre-saved password for the Digital ID and click sign. This will now append the Digital Signature to the order form ready for submission

## 12. Attachments

When adding attachments, please ensure all attachments added or removed prior to digitally signing the order form and before submission.

## 13. Submitting Your Order Form

When clicking on the submit button at the bottom of the page(s) this will generate an email using your email client (such as Microsoft Outlook), attaching the completed form and submitting the form directly to the [Uk.contact@verifone.com](mailto:Uk.contact@verifone.com) account for processing. In the event of a Renewal Order, the form will automatically be submitted to the renewals team in Verifone via [ociusrenewals@verifone.com](mailto:ociusrenewals@verifone.com).

## 14. Direct Debit & MAC Forms

These additional options are made available by selecting the corresponding checkbox at the bottom of the main order form. These are optional pages should they be relevant in accompanying the main order form for submission.