

MERCHANT CONSOLE USER GUIDE

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DASHBOARD

The home page of your merchant console is the Dashboard. The Dashboard is your main source of information for system or maintenance updates, new software releases, and other merchant-related announcements.

	T NEW CONSOLE DEMO MERCHANT	Search	Qh	a ?
Ճ Dashboard ☆ Transactions	Hello newconsole Iast login: 03/17/16 03:11 pm PDT	SERVER RESPONSE N/A	REPORTED OUTAGE	ALERTS O None
Batches	Solution			
😤 Customers	Holiday Barrier Bar			
Products	Dear Trusted Merchant, We would like to remind you that our main office will be open until 3 pm PST on Friday, December 11. Customer support will be available until 6 pm PST. Thank you and Happy Holidays!			
III Reports				
Fraud Manager	· · · · · · · · · · · · · · · · · · ·	4		
🗙 Settings	⊕			
	0			

Widgets

To add widgets, click the icon to access the drop down menu as shown in the image below.

- Enable a widget:
- Disable a widget: OFF •)

	1	NEW CONSOLE DEMO ME	RCHANT				Search	Q	E
 Ճ Dashboard ☆ Transactions 	æ	Transactions Graph showing total sa	OFF •	Newsfeed A digest of news related to		Current Batch Graph showing total sales	OFF •	Simple Charge	OFF •
Batches	Œ	day.			ine maaary.	credits for the current batc		charge action.	ng a simple
😃 Customers	Œ	Follow Us Quick access links for s	OFF	Clock An analog or digital clock.	OFF ●				
Products	œ								
III Reports									
Fraud Manager	æ	A Hello newco					SERVER RESP N/A	ONSE REPORTED OUTAG	BE ALERTS
🗙 Settings	Ð	läst login: 03/17/16 03:11 pm P	T						
	G	Newsfeed				×			
		Holiday		m 201	5-12-09 🔍 P	osted by: Sample Reseller			
				mind you that our main office w ilable until 6 pm PST. Thank yo					

To adjust the order of your widgets, click the top bar of the widget then drag and drop it to the desired location. See widget descriptions below:

- Transactions Shows a graphical summary of your total sales and voided transactions by day.
- Newsfeed Shows a digest of news related to the industry, our latest announcements, system or maintenance updates, and more.
- **Current Batch** Shows a graphical summary showing your total sales and total credits for the current batch.
- Simple Charge A minimal form for performing a simple charge transaction.
- Follow Us Access links for social media.
- Clock An analog or digital clock.

You can process 7 different types of transactions (New Order, Simple Charge, Auth Only, Refund, Voice Auth, Simple ACH, Reverse ACH) and activate gift cards. To access these types of transactions, click on the (+) next to 'Transactions' on the side menu bar.

New Order

The New Order form lets you process transactions that include the order's details (Invoice Number, Products, and Order ID), the customer's information, and the payment information. Through this form, you can add products from your database to the order as 'Line Items'.

To access the New Order form, click 'Transactions' on the side menu bar from your Dashboard then select 'New Order' on the drop down menu. See image below.

		New Console Demo Merchant					Search Q Ø 🕩
🖬 Dashboard		New Order Form					Order Form Settings
➡ Transactions	Θ						
New Order Simple Ch. e		-					Order Info
Auth Only		🔫 Order		Customer	6	Payment	C
Refund Voice Auth							No Items in Order
Simple ACH		Order Details					Go To Order
Reverse ACH Gift Card Tools		Invoice Number	PO Number	Order ID	Lín	ne Items	
Batches		12	PO #	Order ID	~	Line Items On	Customer Info
😃 Customers	Ð	denies -					0
Products	æ	Line Items					No Customer Details
III Reports		Add Line Item to Order					Input Details
Fraud Manager	æ	Product	Unit Price	Quantity	Subtotal	Tax	
X Settings	æ						Payment Info
	G			G			6
			No	Items in Order			
			INU	items in Order			No Payment Method
		Order Description:		Subtotal	\$ 0.0	0	
			•	Discount	Add Discour		
A newconsole				Тах	\$ 0.00 • Add Ta		

Step 1: ORDER: Fill in the Invoice Number, PO Number, Order ID, and the Line Items fields, if desired. These fields are optional.

You can customize these fields by clicking ^{Crder Form Settings} located at the top right hand side of your page. Fill in the 'Line Items' with products from the database or by creating custom items.

Invoice Customization

Once you click Order Form Settings

📰, a pop up window will appear.

		Tax		
1	-Populate Invoi	ce Numbers		
001	pice Nümber		ag, 1754	
Invoice N	lumber Offset			
1				

Selecting the 'Auto-Populate Invoice Numbers' box automatically generates an invoice number to populate the 'Invoice Number' field for all New Order transactions.

Enter the desired first invoice number in the 'Next Invoice Number' field. Enter the desired interval between invoices the 'Invoice Number Offset' field.

For example: If you enter '100' in the 'Next Invoice Number' field and '5' in the 'Invoice Number Offset' field, the first invoice number would be 100, the second 105, the third 110, and so on.

Click H Save to apply the setting to the order form

Adding Line Items

Line items allows you to add products to the new order from your Product Database.

				Order Details				
Order Details				Invoice Number	PO Number	Order ID	Line Items	s.
an unit				1	PD#	Order ID	Line item	s On
001 PO #		rder ID Order ID	Line Items	Line Items				
				IPhone (\$599.00)				
ine Items				iPhone (\$599.00) ipad (\$550.00) iPen (\$99.99)				
and the state of the	Quantity	Subtotal	Tax	Shirt (\$5.00) Earrings (\$852.00) Loggings (\$5.00) Hoodie (\$10.00) Skirt (\$25.00)				
	Quantity D	Subtotal	Tax	Earrings (SB52.00) Loggings (S5.00) Hoodie (\$10.00)	0	Add Custom Item		
d C \$ 0.00		\$0.00		Earrings (SB52.00) Loggings (S5.00) Hoodie (\$10.00)	0	Add Custom Item Subtotal	\$0.00	
Product Unit Price d () \$ 0.00 Order Description:	0 Subtotal	\$0.00	00	Earrings (5852.00) Loggings (55.00) Hoodie (\$10.00) Skirt (\$25.00)	0		\$0.00	
Product Unit Price	0 Subtotal Discoun	\$0.00 I \$0.0 t \$0.0 • Add Discou	00 00 010	Earrings (5852.00) Loggings (55.00) Hoodie (\$10.00) Skirt (\$25.00)		Subtotal		
d C \$ 0.00	0 Subtotal	\$0.00 I \$ 0.0 It \$ 0.0	00 00 010	Earrings (5852.00) Loggings (55.00) Hoodie (\$10.00) Skirt (\$25.00)		Subtotal Discount	\$0.00 • Add Discount \$0.00	

To add an item, type the name of the product or the SKU in the 'Line Items' field. A drop down menu will appear with the items that match that criteria.

Click the desired item and adjust the 'Quantity' field as needed. You may also add a custom item when a product is not on your database yet. To add a custom item, click into the 'Line Items' field and click 'Add Custom Item'.

Enter in the product name, Unit Price, Quantity, and Order Description. Check the Tax box if the item is taxable. Repeat until all desired items are added, then click **Next** to continue to Step 2.

Step 2: CUSTOMER: If your customer is a returning customer or already in the database, you can search their name or Customer ID number on the 'Search' field. A drop down menu with customers matching the criteria entered will appear. Select the correct customer.

For new customers, enter their information in the desired fields. To save the customer's details for future transactions, click the 'Save Customer and the Provided Details to the Customer Database' box.

Click when done to continue on to the 'Payment Section.

Searc	th by name or ID#			٩	
Billing	Address				
-	Customer ID				
4	First Name		4 L	ast Name	
8	Company				
	Address				
	Address 2				
0	City			Q State	
9	Zip Code	9	Country		
e 1	Phane Number		⊖ F	ax Number	
	Email Address		8 N	labolica	
Sh	hipping address same as billing a	address	Sav	e the customer and the provided det	ails

Step 3: PAYMENT: Depending on the payment methods you accept, you may have the option to accept **Credit**, **Check**, **Cash** or **Gift Cards**.

Credit: To process a credit card transaction, you may swipe the customer's credit card or manually enter the customer's information. To swipe the customer's credit card, click swipe.

Once you have swiped the card, the 'Credit Card Number', 'Card holder Name', and 'Expiration Date' will auto-populate.

	_	설 Durbbard	New Order Form			Q Other Frank Sellings
Crder	Customer S Payment	New Order Simple Draige Auto Day Parked Vecen Auto Simple ACH Revene ACH Gitt Card Toole	© Croer	Please Swipe	Payment	nder Info No Isems in Order Du 16 Order
Credit Credit Check	Giftourd Cash	 ▲ Instance ▲ Cassowers ④ Processie ▲ Reports ♥ Proce Mercage ★ Instrup 				No Customer Info No Customer Datais Init Customer Agreent Info
Credit Card Number	Swipe		Autorize Only B	AVS Zo 9 AVS Zo		No Payment Millhod
Name on Card	0				_	
Lardholder Name					4 Finni	
Expiration Date CVV2/C	VC AVS Street	information	ually entering , the 'Credit (are required	Card Numbe	er' and 'Ex	piration
	AVS Zip	remember t	our Queued 1	"Authorize (Only" box.	th Only', This charge ge 7 for Auth

Note: If a customer is a returning customer and you have their payment method saved, a Customer Payment icon will be available to process the transaction.

Cash: To process a cash transaction, enter the 'Amount Tendered'. The amount tendered must be higher than or equal to the total amount of the order. The customer's 'Change Due' will automatically be calculated for you.

Check: To process a check transaction, enter the 'Name on Check', 'Routing Number', 'Check Number', 'Account Number'. All the other fields are optional.

Gift Card: To process a gift card transaction, enter the gift card number.

Step 4: Once all the payment information is entered, click **Process**. A pop-up window will appear with one of three responses: Transaction Approved', 'Transaction Declined, or 'Error'.

As shown in the image below, the Transaction Approved window gives you the following options: view the customer's payment details, a link to your Batch Manager, a link to print the receipt, a link to email the receipt, and a link to process a new transaction.

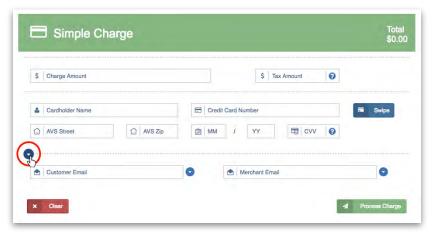
		Transaction Approved	
C. Harris	850.00	Details:	more transaction deta
Subtotal: Total:	\$50.00 \$50.00	Card Number:	4000xxxxxxx2224
	000.00	Authcode:	694499
_	_	AVS Response: CVV2 Result:	Address: Match & 5 Digit Zip: Match Match
Paymén	t Details	0112 100010	WHICH .
		Transaction ID:	105252841

If your transaction is declined, a pop up window will appear giving you the 'Reason' for the decline and the 'Error Code' of the transaction. See image below. To double check if you have entered the right credit card information, or to re-swipe the customer's credit card, click Return to Transaction.

	\$	÷	
	Transaction De	eclined	
Transaction Details			
Reason: Card Declined (00) Error Code: 10127			
	Return to Trans	saction	
Batch Manager	Print Receipt	Email Receipt	New Transaction

Simple Charge

Simple Charge transactions are meant for one time credit card sales. From your Dashboard, click on 'Transactions' then click 'Simple Charge' on the drop down menu.



Step 1: To process a one-time credit card sale, you may swipe the customer's credit card or manually enter the Charge Amount, Credit Card Number, and Expiration Date. These fields are required and must be entered to process the charge. The Cardholder Name, Tax Amount, AVS Street, AVS Zip Code, and the CVV are all optional entries.

To swipe the customer's credit card, click swipe.

Once you have swiped the card, the customer's encrypted credit card information will automatically be entered in the following fields: Cardholder name, Card Number, and Expiration date.

ය Dashboard		E Simple C		
		S Charge Amount	\$ 1 Tes /	Versund D
	1	Contractor Nome	Please Swipe	
		0		
	1.	Customer Erma	Murchard Envel	
2) Products	14		\rightarrow	
lad Reports		x Dear	\rightarrow	4 Prome Charge
O Freud Menager				
	G			

To email the receipt to your customer, enter their email in the 'Customer Email' field. To send a report of the transaction to your own email, enter your email in the 'Merchant Email' field. To reveal additional fields, (such as Company Name, Customer ID #, Invoice #, PO#, Order ID, and Description) click on the drop down arrow on the top left side of the 'Customer Email' Field.

\$ Charge Amount			\$ Tax Amount	0	
Discover Testcard		6011*****	***2224		ට Clear
AVS Street	AVS Zip	Expiration Date		CVV	0
Customer Email			Merchant Email		

Step 2: Once all desired fields have been entered, click Process Charge. A pop-up window will appear and with one of three responses: 'Transaction Approved', 'Transaction Declined', or 'Error.

Auth Only

An Auth-Only transaction is a pre-authorization of funds. This means that the funds are not actually deducted from the card holder's account but are reserved for a specific transaction. Some examples of Auth-Only transactions are appointment reservations or products that are not given or shipped directly after the sale has taken place (such as back orders).

Note: Use caution when using Auth Only transactions. Every time an Auth Only transaction is used, the amount pre-authorized will be reserved from the customer's account, therefore limiting their available balance on their credit card account. When an Auth-Only transaction is captured, the transaction is moved to the current batch in the 'Batch Manager'.

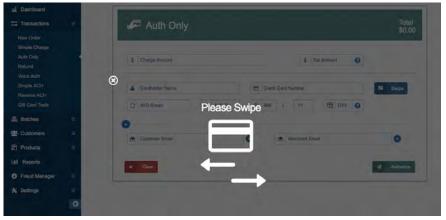
\$ Charge Amount	\$ Tax Amour	
Cardholder Name	Credit Card Number	🖬 Swip
AVS Street	WS 📄 I YY 🔁 C 😮	~
Customer Email	Merchant Email	0

Step 1: Auth Only is similar to entering a Simple Charge transaction. You may swipe the customer's credit card or manually enter the customer's credit card information.

To swipe the customer's credit card, click swipe.

Swipe the customer's credit card when you see the 'Please Swipe' window.

When manually entering a customer's credit card, the required fields to process an Auth Only Charge are: *Charge Amount, Credit Card Number,* and *Expiration date.* The *Cardholder Name, Tax Amount, AVS Street, AVS Zip Code,* and the *CVV* are all optional entries.



To email the receipt to the customer, enter their email in the 'Customer Email' field. To send a report of the transaction to your email, enter your email in the 'Merchant Email' field.

To reveal the additional fields, (Company Name, Customer ID #, Invoice #, PO #, Order ID, and Description), click the drop down arrow on the top left side of the 'Customer Email' field.

Step 2: Once you've completed entering the fields, click Authorize . A pop up window will appear with one of the three responses: 'Transaction Approved', Transaction Declined', or 'Error'.

Refund

The Refund page of your merchant console allows you to credit a customer's credit card. A transaction can only be refunded if it has settled. If the transaction has not settled, the transaction must be voided. This page gives you three options: refund a transaction, void a transaction, or view transaction details.

Issue A Refund

To issue a refund, go to 'Transactions' and select 'Refund' from the drop down menu. Once you have clicked 'Refund', you will be taken to a new page showing your most recent transactions.

Step 1: Search or scroll down to the transaction you would like to refund. Search for the specific transaction by entering the Card holder's name, Transaction ID number, Auth Code or by swiping the credit card you would like to refund.

Transactions	e	S Ref	und				
		Search Tra					
New Order							
Simple Charge		Q Select	or Find Transaction to R	efund			Swipe
Auth Only		Or create an Oper	n Refund				
Refund	×						
Voice Auth		Recent Trans	sactions				
Simple ACH Reverse ACH		-	- An owned as a		1000	A	
Gift Card Tools		Date	Card Holder	Transaction	Auth Code	Amount	
		03/22/16 03:42		105255229	695163	\$500.00	Q DETAIL O VOID
Batches	œ	pm					
Lustomers	•	03/22/16 03:34		105255121	695128	\$50.00	Q DETAIL O VOID
Products	æ	pm					
Products		03/22/16 02:34		105252841	694499	\$50.00	Q DETAIL O VOID
III Reports		pm					C DETAIL
Fraud Manager	œ	03/22/16 02:25		105252571	694436	\$500.00	
		pm					S, DEINE VOID
X Settings	۲	03/22/16 02:22		105252385	694385	\$60.00	
	G	pm					ST DETAIL
		03/22/16 02:15	Kim	105252154	694317	\$53.30	
		pm					of DETAIL VOID
		03/22/16 09:24	kaylaaTEST	105241825	105251	(\$64.20)	
		am					
		03/21/16 03:58	kaylaaTEST	105225193	686807	\$64.20	Q DETAIL O REFUND
		pm					
		03/21/16 07:43	test 1	105212863	683803	\$1.00	Q DETAIL O REFUND
		am					
		03/21/16 02:46 am		105208102	682545	\$2.00	Q DETAIL O REFUND

Step 2: Click Concerning to refund the transaction. On the pop up window, click Concerning to confirm the refund transaction.

Refund Transaction				
You are about to refund transaction #105212863.				
	*	Cancel	9	Refund

Open Refund

If you are unable to find the transaction from entering the transaction number, cardholder's name, authorization code, you may issue an open refund.

Q	Select or Find Transaction to Refund	🖬 Swipe
---	--------------------------------------	---------

Step 1: Click on the 'Open Refund' link below the 'Search Transactions' field. You will be taken to the Open Refund page.

Step 2: Enter the amount of the refund, the customer's credit card number and the card's expiration date.

The Cardholder Name, Tax Amount, AVS Street, AVS Zip Code, and the CVV are all optional entries.

To swipe the customer's credit card, click swipe.

\$ Amount		
Cardholder Name	Credit Card Number	Swipe
AVS Street	會 MM / YY 酉 CVV 10	
)		
Customer Email	Merchant Email	0

To email the receipt to your customer, enter the customer's email in the 'Customer Email' field. To send a report of the transaction to your own email, enter your email in the 'Merchant Email' field.

To reveal additional fields (such as Company Name, Customer ID#, Invoice #, PO#, Order ID, and Description), click the drop down arrow on the top left side of the 'Customer Email' field.

Step 3: Once you've completed the desired fields, click **Credit**. A pop up window will appear with one of the three responses: 'Transaction Approved', 'Transaction Declined', and 'Error'.

Void A Transaction

A void nullifies or cancels a transaction. If a batch has not been closed or settled, a transaction can be voided.

Step 1: To void a transaction, click 'Transactions' on the side menu bar. A drop down menu will appear, click on 'Refund'. Once you've clicked 'Refund' you will be taken to a page where you can see your Recent Transactions.

Step 2: Click of the transaction you want to void. A pop up window will appear to confirm the void with the transaction number.

Step 3: Check the 'Release funds immediately' box to return the funds to the customer as soon as possible then click void.

Note: The 'Release Funds Immediately' box will be available depending on your processor.

/oid 1	Transaction	
	are about to void transaction #105255229. This will remove the transaction from your h and prevent it from settling.	
The I	funds that were held on the cardholder's account will be released once the batch has ad. If you would like to release the funds immediately, check the box below.	
	Release funds immediately	
	X Cancel 🖸 Vol	a

A pop up window will appear with one of the three responses: 'Transaction Approved', 'Transaction Declined', and 'Error'

Voice Auth

A Voice Auth transaction is most often used when a merchant attempts to process a transaction and receives an error code indicating that the transaction requires voice authorization. When processing a Voice Auth, the merchant must contact the customer's issuing bank for an authorization code.

To process a VoiceAuth, go to 'Transactions' on the side menu bar then select 'VoiceAuth' from the drop down menu.

Step 1: Manually enter the customer's credit card information or swipe the customer's credit card. To swipe a customer's credit card, click swipe. Swipe the customer's credit card when prompted.

\$ Amount	Authorization Code
Cardholder Name	Credit Card Number 📼 Swi
AVS Street	SZ B N YY C CV O
Customer Email	S Merchant Email

When manually entering the customer's credit card information, enter the Card Number, the card's Expiration Date, Authorization amount, and Authorization code provided by the customer's issuing bank. The Cardholder Name, AVS Street, AVS Zip Code, and the CVV are all optional entries.

To reveal additional fields (such as Company Name, Customer ID#, Invoice#, PO#, Order ID, and Description), click the drop down arrow on the top left side of the 'Customer Email' field. To email the Voice Auth receipt to your customer, enter the customer's email in the 'Customer Email' field.

To send a report of the transaction to your own email, enter your email in the 'Merchant Email' field.

Step 2: Once all the proper information is entered, click Authorize to process the VoiceAuth transaction. A pop up window will appear with one of the three responses: 'Transaction Approved', 'Transaction Declined', and 'Error'

Simple ACH

Simple ACH can only be used if a merchant is set up to process an Automated Clearing House (ACH) transaction. Contact your reseller to enable Simple ACH transactions in your account

To process a Simple ACH, go to 'Transactions' on the side menu bar and select 'Simple ACH' form the drop down menu.

Step 1: Enter the customer's Name on Check, Routing Number, and Account Number.

\$ Charge Amount			\$ T	ax Amount 🔞	
A Name on Check		Routing Numb	er 🖾 A	ccount Number	Check
License ID	I State	- Check F	ormat - 🛟	Account Type:	;

The Tax Amount, Check Number, License ID, State, the Check Format, and the Account Type are all additional fields.

You may choose to email the receipt to your customer by entering their email on the 'Customer Email' field, and send a report of the transaction by entering your email on the 'Merchant Email' field.

For additional fields to process the order, click on the drop down arrow on the top left side of the 'Customer Email' field. These additional fields include the customer's Company Name, Customer ID #, Invoice #, PO #, Order ID, and Description.

Step 2: Once you've completed entering the desired fields, click **Process ACH**. A pop up window will appear with one of the three responses: 'Transaction Approved', 'Transaction Declined' or 'Error'.

Reverse ACH

A Reverse ACH transaction serves as a refund for a Simple ACH transaction. An ACH transaction can only be processed if a merchant is set up with an ACH processor. To process a Reverse ACH, click 'Transactions' on the side menu bar then select 'Reverse ACH' from the drop down menu.

Step 1: Enter the Amount to be refunded, the Customer's Name on Check, their Routing Number, and their Account Number. The Check Number, License ID, State, the Check Format, and the Account Type are all additional fields.

\$ Amount					
Ame on Check	(L)	Routing Numbe	r 🖾 4	ccount Number	Check
E= License ID	E State	- Check Fo	rmat - 🗘	Account Type:	\$
Customer Email			Merchant E	mail	

To reveal additional fields (such as Company Name, Customer ID#, Invoice#, PO#, Order ID, and Description), click the drop down arrow on the top left side of the 'Customer Email' field.

To email the receipt to your customer, enter the customer's email in the 'Customer Email'. field.

To send a report of the transaction to your own email, enter your email in the 'Merchant Email' field.

Step 2: Once you've completed entering the fields, click **Reverse ACH**. A pop up window will appear with one of the three responses: 'Transaction Approved', 'Transaction Declined', or 'Error'.

Gift Card Tools

Gift Cards Tools can be used if your account is set up to accept GETI gift cards. Contact your merchant service provider to start accepting gift cards. To activate a GETI gift card, click 'Transactions' on your side menu bar, then click 'Gift Card Tools'.

Step 1: Enter the number of the card, then click Set Card .

Card Number	

Step 2: If the card is new, an initial amount must be added to activate the GETI gift card.

Enter the amount and click Activate Card

The card number can be changed if desired, by clicking on the 'Change' button on the top right hand side of the window.

Activate Gift Card	Card #:5430196496353 Cluange
In order to activate the card #54301 be added.	1964963534, an initial amount must
	Amount \$ 0.00
Cancel	Activate Card

Step 3: A pop-up window will appear to confirm the amount and the card number. If the information is correct, click

Step 4: Once the card is activated, you will be taken to a new page. See image below.

	1	NEW CONSOLE DEMO MI	ERCHANT					Search	QE
🖬 Dashboard		Gift Card	Tools						
Transactions	•								
New Order				Gift Card	4301964963534		Change		
Simple Charge			S				_		
Auth Only				-	The second second			£	
Refund			Bala	nce	Gift Card Tools	_			
Voice Auth Simple ACH									
Reverse ACH			\$	75.00		+	-		
Gift Card Tools			Ψ	10.00	Add Funds	Tra	nsfer		
Batches	Œ						inces		
Customers	Ð		Card Tra	ansaction Histor	У				
Products	æ		Transacti	on Type	Date	Amount	Status		
III Reports			10.56 Take	Activation	04/04/16 11:47 am	75.00	Pending		
Fraud Manager	œ								
🗙 Settings	œ					Gift	Card Transact	ions	
	G								

From this page, you can view the gift card's current balance, add funds, transfer the balance to another gift card, view the transaction history, and change the card number.

Add More Funds

To add more funds, click the 'Add Funds' icon on the Gift Card Tools window, and repeat steps 1 to 4. Refer to the image on page 13.

Transferring A Balance

To transfer a balance, click the 'Transfer Balances' icon on the Gift Card Tools window.

Step 1: Enter the Card Number you are transferring funds from then click Transfer Balance

	=	NEW CONSOLE DEMO MERCHANT			Search	Q 2 2 7
M Dashboard		Gift Card Tools				
Stransactions	0		Transfer Balance	Cand #5430196496350		
New Order						
Simple Charge Auth Only			O Transfer balances from other cards	to card #54301964963534.		
Refund					1	
Voice Auth			Transferring From			
Simple ACH Reverse ACH			Card Number			
Gift Card Tools						
Batches	œ		Cancel	Transfer Balance		
A Customers	m					
Products						
Lill Reports				Gift Card Transac	tions	
O Fraud Manager	•					
× Settings						
	G					

Step 2: A pop up window will appear. Confirm the card number you are transferring the funds from then click - Transfer .

Note: Keep in mind when transferring a balance from Gift Card 1 to Gift Card 2, Gift Card 1 will be terminated. The card can no longer be used.

ransfer Value				
You are about to transfer the balance of c	ard #543878250704	64 to the car	d	
#54301964963534.				

Step 3: You will be taken back to the gift card's page. A pop up message will appear, confirming the balance was transferred successfully.

		NEW CONSOLE DEMO MERCHANT 2						Search	
 ▲ Dashboard ➡ Transactions New Order Simple Charge A the Oct 	0	🛗 Gift Card Tools	** G	ift Card 5	4301964963534	Suc Balar \$		transferred successfully.	*
Auth Only Refund Voice Auth Simple ACH Reverse ACH Gift Card Tools			Balance \$747.	75	Gift Card Tools	t Tran	∎ sfer		
Batches	æ					Bala	nces		
😤 Customers	æ		Card Transa	ction Histor	У				
Products	æ		Transaction	Туре	Date	Amount	Status		
III Reports			10081.0+61	Activation	04/04/16 11:47 am	75.00	Pending		
Fraud Manager	•								
🗙 Settings	۲					Gift	Card Transac	tions	

To view all your gift card transactions, click on the 'Gift Card Transactions' at the bottom of the page.

Think of a batch as a virtual register. Once a transaction is authorized or approved, it is placed into a batch. Just like a register, a batch needs to be closed on a daily basis (every 24 hours) to receive the funds. Transactions that have been processed through the gateway are grouped together in batches or bundles. This batch must then be closed for the transactions to settle and be deposited into your merchant service bank account.

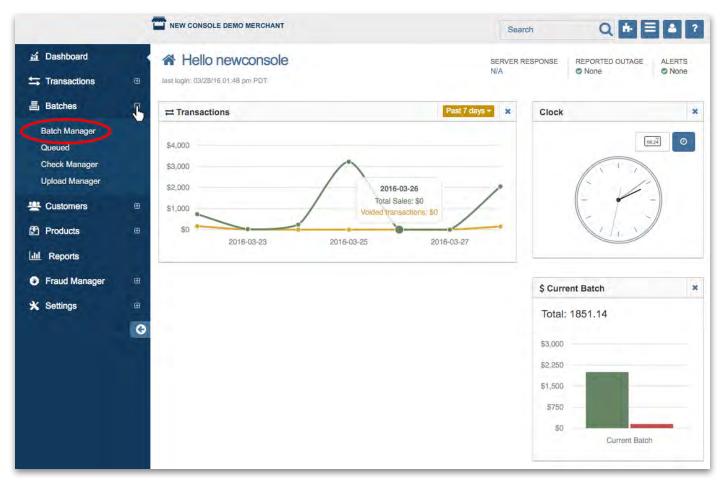
We have created sections in the Batches menu to help you manage and view your transactions easily and efficiently:

- Batch Manager
- Queued Transactions
- Check Manager
- Upload Manager

Batch Manager

The Batch Manager is considered the most important section of the merchant console. This is where all your successful debit card and credit card transactions are stored. If a transaction has been declined or received an error, it will NOT be placed into a batch or into the Batch Manager.

To access the Batch Manager, click on 'Batches' on the side menu bar then select 'Batch Manager' from the drop down menu.



Your current open batch is displayed when you first enter the Batch Manager page. The open batch contains all transactions that have not yet closed or settled.

🔬 Dashboard		(\$) E	Batch Ma	nager		Q.	Close Batch	🛗 Batch Hist	ory	nmary 🗘 Option
Transactions	•	m Cu	rrent Batch		Transact	ions Sales	By Source		Sales By Ca	rd ^
Batch Manager Queued Check Manager Upload Manager		Tota	ch Total Sales (6) Voided (0)	\$2001.14	400 - 300 - 200 - 100 -					 JCB Discover Master Visa
😤 Customers	æ		l Credits (1)	\$150.00 3/29/16 3:00 am PDT	0 Sales Voids	credits				
Products	æ		Date	Card Holder	Card Type	Card Number	AVS	CVV2	Amount	Auth
Reports	æ		03/28/16	test 01	VISA	xxxxxxxxx1111	m	0	\$9.50	745679
X Settings	æ		03/28/16	Test Four		xxxxxxxx2226		۵	\$87.99	742585
	G		03/28/16	Test Three	VISA	xxxxxxxx2226	m	0	\$207.25	742573
			03/28/16	Kim	69	xxxxxxxxx2226	NA	NA	(\$150.00)	105432
			03/28/16	Test 2		xxxxxxxx2226	-	0	\$110.34	742558
			03/28/16	Kim Test	DISCOVER	xxxxxxxx2224	my	0	\$54.50	742545
			03/28/16		51	xxxxxxxx0000 🔒	YYY	0	\$1531.56	739549
		Showing	1 to 7 of 7 en	tries.						

Batch Summary

The top section of the Batch Manager shows a detailed and graphical breakdown of your current batch. The specific breakdowns are:

- A detailed list of your Batch Total based on your Total Sales, Total Voided, and Total Credits (or refunds).
- A vertical bar graph based on the total amount of your Total Sales, Total Voided, and Total Credits (or refunds).
- A pie chart showing a breakdown of your total Sales By Source.
- A pie chart showing a breakdown of your total Sales by Card.



The bottom section of the Batch Manager shows your current batch's transaction details such as the Date, Cardholder's Name, Card Type, Card Number, Address Verification System or AVS, Card Verification Value or CVV2, the Amount of the transaction, and the Authorization Code.

Date	Card Holder	Card Type	Card Number	AVS	CVV2	Amount	Auth
03/28/16	test 01	VISA	xxxxxxxx1111	YYY	Ø	\$9.50	745679
03/28/16	Test Four		xxxxxxxxx2226	YYY	0	\$87.99	742585
03/28/16	Test Three	VISA	xxxxxxxx2226	~~~	0	\$207.25	742573
03/28/16	Kim		xxxxxxxx2226	NA	NA	(\$150.00)	105432
03/28/16	Test 2		xxxxxxxx2226	~~~~	0	\$110.34	742558
03/28/16	Kim Test	DISCOVER	xxxxxxxxx2224	YYY	0	\$54.50	742545
03/28/16		141	xxxxxxxx0000	~~~~	0	\$1531.56	739549

Remove Batch Summary

If you prefer not to have this section on your Batch Manager Page, click on the drop down arrow on the right hand side of the graph section.



View Detailed Batch Summary

Step 1: Click Hald Batch Summary located on the top right hand side of the page.

- Step 2: A pop up window will appear showing the following information:
 - By Source or Source Key: It shows you the total funds, transaction count, and total credit. Note: A Source Key is a 16 alphanumeric digit that allows merchants to integrate with shopping carts, 3rd party softwares, and the ability to build a payment form. It identifies the source of where and how the transaction was processed.



• By Users: It shows all the transaction count, total credit and total funds by users in your account.



• **By Card Type:** It shows the source by credit card type, the total amount of transaction from each credit card, the count, and total credit.

III Batch Summary				E Card Type +	🛔 Users 🕶	III Sources -
102% 109%	● JCB ● Discover ● Mastor ● Visa			Fur	nds kunt	
Batch Summary by Card T	Гуре	Funds	Count		Credit	
JCB		\$1531.56	1		0	
	-	\$1531.56 \$54.50	1		0	
Discover			1 1 3			
JCB Discover Master Visa	-	\$54.50	1 1 3 2		0	
Discover Master		\$54.50 \$220.13			0 1	× Close

Step 3: Click Close to exit the Batch Summary.

Rearrange Your Table

By default, your batch is arranged with the most recent transaction at the top and the oldest or first transaction of the batch at the bottom. The table can be rearranged based on the card holder's first name, card type, card number, amount of the transaction, or the authorization code. For example, click on 'Card Holder' on the top bar of the table to rearrange the table by the card holder's name.

~	Date	Card Holder	 Card Type 	Card Number	AVS	CVV2	Amount	Auth
	03/28/16	V	131	xxxxxxxx0000	m	0	\$1531.56	739549
	03/28/16	Kim		xxxxxxxx2226	NA	NA	(\$150.00)	105432
	03/28/16	Kim Test	DISCOVER	xxxxxxxx2224	YYY	0	\$54.50	742545
	03/28/16	test 01	VISA	xxxxxxxxx1111	***	0	\$9.50	745679
	03/28/16	Test 2		xxxxxxxx2226	YYY	0	\$110.34	742558
	03/28/16	Test Four	9	xxxxxxxxx2226	YYY	0	\$87.99	742585
	03/28/16	Test Three	VISA	xxxxxxxx2226	YYY	0	\$207.25	742573

Customize Your Table

Step 1: You can customize your table by adding or deleting specific fields. Click Options on the top right hand side of your Batch Manager page then click 'Customize Table'.

		NEW CONSOLE DEMO ME	RCHANT				Search	QED
🖬 Dashboard		Satch Mana	ager			Q 🕜 Close Batch 🕅 Bat	ch History	Summary Option
Transactions	œ							E Customize Table
Batches	Θ	Current Batch						± Export
Batch Manager					Transactions	Sales By Source	Sales By	₽ Print
Queued		Batch Total	\$1851.14	400 -	1			🖾 Email
Check Manager		Total Sales (6)	\$2001.14	300 - 200 -	N			Discover
Upload Manager		Total Voided (0)	\$0,00	100 -				Master Visa
Customers		Total Credits (1)	\$150.00	0	Sales Volds Credits			
B Draduata		Batch will auto-close 03/2	9/16 3:00 am PDT					

The 'Table Options' pop up window will appear showing your current fields and available fields.

able Options							
urrent Fields							
🔳 Date 🔛 Ca	rd Holder 🔳 Ty	pe 📕 Card Number	III AVS III	CVV2 🔚 Amount	III Auth		
vailable Fields	lease drag to the Curren	1 Fields seepon					
🔳 Şource 🛛 📕)	nvoice 🔡 Card	Level III CAVV	📰 Transaction ID	📕 Status 🛛 📕 Bé	tch 📕 Order ID 📲	Time III PO #	
E Description	Tax I AVS	Street I AVS Zip	E Customer ID	Billing First Nam	e 📕 Billing Last Name	Billing Company	
Billing Street	Billing Street 2	B Billing City	Billing State	Billing Zip	ng Country 🔡 Billing F	Phone Email	
Shipping First N	ame 📕 Shippir	g Last Name 🛛 📕 Sh	pping Company	Shipping Street	Shipping Street 2	Shipping City	
Shipping State	III Shipping Zip	Shipping Country	y 📕 Shipping Pl	none 📕 Currency	III Native Amt	Jaer IE Comments	III Clerk
							_

Step 2: To add more columns into your current batch table, drag and drop a field button into the 'Current Fields' section. To remove a specific column, drag and drop the desired field button from the 'Current Fields' section to the 'Available Fields' section.

Step 3: Once you have finished adding or deleting specific fields, click CK. If you want to reset your table to default, click C Reset Default.

Search For A Transaction

Step 1: To search for a specific transaction, click the <u>s</u>icon located at the top right hand side of your Batch Manager page. A transaction can be searched by typing in the last four digits of the Card Number, the Cardholder's Name, the Transaction Amount, Authorization Code, and the Transaction ID.

		NEW CO	NSOLE DEMO	MERCHANT						Search	QEA
🖬 Dashboard	Ĩ	(\$) Ba	atch Mar	nager			(Q @ CK	ose Batch 🗂 Batc	h History	Batch Summary Optio
Transactions								27		-	
Batches	Θ	m Curre	ent Batch			Sec. 10	Colos Du	Course		Calao Di	Cont
Batch Manager					Ira	nsactions	Sales By	Source		Sales By	y Caru
Queued		Batch	Total	\$1851.14	800 -						• Visa
Check Manager		Total S	ales (6)	\$2001.14	600						Discover
Upload Manager		Total V	(oided (0)	\$0.00	400 -						Master AmEx
Customers	æ		Credits (2)	\$150.00	200		-				
Products	æ	e baicri	Viii 0010-07030 0	400/10/100 all (D)	Sales	Voids Credits					
		- *	Date	- Card Holder	Card Type	Card Number	AVS	CVV2	Amount	Auth	BatchRefNum
Products Reports Fraud Manager	æ		Date 04/08/16	Card Holder	Card Type VISA	Card Number	AVS	CVV2	Amount \$67.39	Auth 909579	BatchRefNum 217007
III Reports	•		and a second	a second		Construction of the local distribution of th		1000	No. of Contraction		

Step 2: The image below shows an example of searching for a transaction by the card holder's name. Enter the name of the card holder in the search field. All transactions that match the criteria entered will appear on the page.

M Dashboard		John							X 🛍 Ba	tch History	III Batch Summary Option
Transactions	æ									-	
Batches		• *	Date	- Card Holder	Card Type	Card Number	AVS	CVV2	Amount	Auth	BatchRefNum
Batch Manager			04/08/16	John Doe		xxxxxxxxxxxx2226	NA	NA	(\$100.00)	Credit	217007
Queued Check Manager Upload Manager			04/08/16	John Doe	DISCOVER	xxxxxxxxxxxxx2224	W	0	\$1500.00	909561	217007

View Transaction Details

Step 1: To view a transaction's details in your current batch, click on the desired transaction.

		NEW NEW	CONSOLE DEMO M	ERCHANT					Search	QE
교 Dashboard		(\$) E	Batch Man	ager			Q. O Close	Batch 🛗 Batch	h History	Summary Optio
Transactions	•									
Batches		m Cu	rrent Batch							
Batch Manager					Transaction	15 5	Sales By Source		Sales By Ca	rd
Queued		Ва	tch Total	\$1872.94						· JCB
Check Manager Upload Manager		Tota	al Sales (7)	\$2022.94						Discover Master
			I Voided (0)	50.00						Visa
Customers	•		al Credits (1)	\$150.00 29/16 3:00 am PDT						
Products	۳		-	a lanasa a		and the second				
III Reports			Date	- Card Holder	Card Type	Card Number	AVS	CVV2	Amount	Auth
Fraud Manager			03/28/16	Green	8	xxxxxxxx2226 🔒	YYY	0	\$21.80	747431
K Settings			03/28/16	test 01	VISA	xxxxxxxxxx1111	(YYY)	0	\$9.50	745679
	G		03/28/16	Test Four	8	xxxxxxxxx2226	YYY	0	\$87.99	742585
			03/28/16	Test Three	VISA	xxxxxxxx2226		0	\$207.25	742573
			03/28/16	Kim		xxxxxxxxx2226	60		(\$150.00)	105432
			03/28/16	Test 2		xxxxxxxx2226	YYY	0	\$110.34	742558
			03/28/16	Kim Test	озсичи	xxxxxxxxx2224	m	0	\$54.50	742545
			03/28/16		101	xxxxxxxxxx0000		0	\$1531.56	739549

Step 2: Once you click the transaction, you will be taken to a new page with that transaction's complete details. **Note:** You will only be able to view approved debit or credit card transactions in the Batch Manager.

	T NEW CONSOLE DEMO MERCHANT				Search	
<u>mí</u> Dashboard ≒ Transactions ⊞	Transaction Detail					۲
Batches Batch Manager	Simple Charge Transaction Ap	proved	03/28/16 10:21 am PDT	Options		
Queued Check Manager Upload Manager	Test Three		\$ 207.25	E-Mail Receipt	DB	
Lustomers ■ Image: Products ■ Image: Products <td< td=""><td>VISA XXXXXXXXX2226 Address Verification VYY AVS Street: AVS Zip: Address: Match & 5 Digit Zip: Match CVV Result P Not Processed Billing Address Test Three N/A</td><td>Customer Num Auth# Ref# Invoice Shipping Addres Test Three N/A</td><td>0 742573 105422457 8</td><td>Queue Transact Void Transaction Block Card Sale Actions Quick Sale Quick Refund (content) Related Card Activity</td><td>redit)</td><td></td></td<>	VISA XXXXXXXXX2226 Address Verification VYY AVS Street: AVS Zip: Address: Match & 5 Digit Zip: Match CVV Result P Not Processed Billing Address Test Three N/A	Customer Num Auth# Ref# Invoice Shipping Addres Test Three N/A	0 742573 105422457 8	Queue Transact Void Transaction Block Card Sale Actions Quick Sale Quick Refund (content) Related Card Activity	redit)	
	Transaction Results Transaction Source VISA Verified By Visa® Authentication Line Items Koose		* * *	Date D3/02/16 04:28 am	AuthCode AuthCode: 553447	Amount \$1.00

From this page, you can view the following information:

- The customer's name and total amount of the transaction.
- The customer's debit or credit card information: their Address Verification (AVS Results), CVV Result, Billing Address and Shipping address.

 Iransaction Results (click the drop down to view the following 	2 Dashboard	E Transaction Detail			8
details): ➡ Transaction ID	Batches 0 Batch Manager Ouesard	Simple Charge Transaction	Approved	03/28/16 10:21 am POT	Options Print Receipt
	Check Manager	Test Three		\$ 207.25	E-Mail Receipt
Type of Transaction	Upload Manager	ioor mioo		V LOTIED	Limport to Billing DB
Status of the Transaction	분 Customers ····	VISA 000000000000000000000000000000000000			E Queue Transaction
	🔁 Producta 😐	Tion the second s	Customer Num	0	O Void Transaction
➡ Batch Number ➡ Authorization or Auth Code	Intel Reports O Freud Manager Image: Im	2 Address Verification (2) YY A/S Street: A/S Zip:	Auth# Ref# Invoice	742573 105422457 8	Block Card
→ AVS Result	X Setings 0	Address Match & 5 Digit Zip: Match			Sale Actions
➡ CVV2 Result		Not Processed			\$ Quick Sale
Card Level Result		Billing Address	Shipping Addr		Guick Refund (credit)
		Test Tree N/A	Test Three N/A		Related Card Activity
		S Transaction Results		ନ	VISA
		Transaction ID: 10942	2457		
		Type: Simple	Charge		Data AuthCode Amount
		Status Author	ized (Pending Settlement)		0102/16 04.25 am AutrGode \$50447 5 1.00
		Batch: 1			✓ More
		Auth Code: 74257	as: Match & 5 Digit Zip: Match		
		and the second se	ss: Match & 5 Digit Zip: Match		
			a Traditional)		
		the second se			

- Transaction Source (click the drop down to view the following details):
 - ➡ User
 - ➡ Source
 - ⇒ Server IP
 - ⇒ Client IP

Transactions		Transaction Detail			8
Batch Manager		Simple Charge Transaction Ap	proved	3/28/18-10:21 em PDT	Options
Queued Check Manager Upload Manager		Test Three		\$ 207.25	Print Receipt E-Mail Receipt Import to Billing DB.
Customers C Products		VISA xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx	Customer Num Auth# Ref# Invoice	0. 742573 105422457 8	Caree Transaction Viol Transaction Block Card
	G	CVV Result 🔮 🕈 Not Processed Billing Address Test Three Not	Test Three N/A		Sale Actions
		Transaction Results Transaction Source User: memorade		~	Eles AutoCals Amore
		Source: Vierm Server IP; (www.uppe Client IP:			03/02/16 04:28 im AuthCode; 5534/7 \$ 1.00
		VISA Ventiled By Visa® Authentication		*	
		Dune Items		~	

- The line items or products included in the transaction (click the drop down to view the following details):
 - ⇒ SKÚ
 - ⇒ Item Name
 - ➡ Count
 - ➡ Quantity
 - ➡ Subtotal
 - ➡ Taxable

Reports Freud Manager 10 Settings 10	AVS Stre AVS Zip		Auth Ref#		742573 105422457 3	Block Card	
0	Not Proc	ing Address	Time S N/A	Shipping	Address		Sale Actions
	S Transac	tion Results				*	VISA
	VISA Verifie	d By Visa® Authentication		Denis AuthCode Amount			
	E Une Ite	ms		USE2/15 05 21 em Autricide: 55547 8 1 07			
	SKU	item	Cost	âty	Subtotal	Texable	V MOR
	963852152	Leggings	5.00	,	5.00	ÿ	
	963852157	Sweater === 11	200.00	1	200.00	N	
		Paris Training and and and	10.00	,	10.00	Y	
	963852156	Tube Top	5,00	1	5.00	y	
	163652156	Tank Top	5.00	1	5.00	У.	
						ubTotal: 223.00 Discount: 20.00 Taix: 2.25 Total: 207.25	

From this page, you also have a few options for action:

- Print Receipt
- Email Receipt
- Import to Billing DB (Database) This adds the customer's billing information to your recurring billing database.
- Queue Transaction This moves the transaction to your Queued Transactions allowing you to change the amount of the transaction. A transaction can only be moved to your Queued Transactions BEFORE the transaction has settled.
- Void Transaction A transaction can only be voided BEFORE it has settled.
- Block Card This blocks the customer's debit or credit card.
- Quick Sale or Quick Refund
- View Related Card Activity This shows all the processed transaction associated with card, including errors, voids, and declines.

Void A Transaction

Voids can be processed from the transaction's detail page or from the Batch Manager home page.

Note: A transaction can only be voided, if the transaction is still in your current open batch. If a transaction is closed or settled, you can only issue a refund.

To void a transaction from a transaction's detail page follow these steps:

Step 1: Click on 'Void Transaction' in the Options section, on the right hand side of the Transaction Detail page.

-	NEW CONSOLE DEMO MERCHANT		Search Q 🗏 🛎 ?
M Dashboard ☆ Transactions	Transaction Detail		۲
Batches Batch Manager Queued	Simple Charge Transaction App	03/28/16 10:21 am PDT	Options
Check Manager Upload Manager	Test Three	\$ 207.25	E-Mail Receipt Import to Billing DB
Customens Custo	VISA XXXXXXXXXX2226 Image: Constraint of the constraint of	Customer Num 0 Auth# 742573 Ref# 105422457 Invoice 8	Cueue Transaction Void Transaction Sale Actions Quick Sale Quick Refund (credit) Related Card Activity
		* * *	Date AuthCode Amount 03/02/16 04:28 am AuthCode: 553447 \$ 1.00 V More

Step 2: A pop up window will appear to confirm the void. To release the funds back to the customer's bank account immediately, check the 'Release Funds Immediately' box then click Confirm .

Confirm Void	
You are about to void transaction #105422457. and prevent it from settling.	This will remove the transaction from your batch
The funds that were held on the cardholder's ac I you would like to release the funds immediate	count will be released once the batch has closed. iy, check the box below.
Release funds immediately	
	X Cenosi 🖌 Cuntirm

To void a transaction from the Batch Manager homepage follow these steps: **Step 1:** Right click on the transaction you wish to void, then click 'Void'.

		NEW NEW	CONSOLE DEMO M	ERCHANT					Search	980
M Dashboard		(\$) E	Batch Man	ager			Q Octose	Batch 🛗 Ba	tch History	Summary Ø Opt
Transactions	•	-								
Batches	Ð	m Cu	rrent Batch						Salas Du Ca	
Batch Manager Queued Check Manager Upload Manager		Tota	tch Total al Sales (7)	\$1872.94 \$2022.94 \$0.00	400 300 200	tions o	ales By Source		Sales By Ca	JCB Discover Master Visa
Customers	۲		al Credits (1)	\$150.00	100	-				• visa
Products		0 Bat	ch will auto-close 03/	/29/16 3:00 am PDT	0 Sales Void	ls Credits				
III Reports		- ~	Date	- Card Holder	Card Type	Card Number	AVS	CVV2	Amount	Auth
Fraud Manager	œ		03/28/16	Green	8	xxxxxxxxx2226 🔒	(111)	0	\$21.80	747431
Settings	⊞		03/28/16	test 01	VISA	xxxxxxxxx1111	TTT	0	\$9.50	745679
	Ø		03/28/16	Test Four		xxxxxxxx2226	TYY	0	\$87.99	742585
			03/28/16	Test Three	VISA	xxxxxxxxx2226 🔒	YYY	0	\$207.25	742573
			03/28/16	Kim	Q Details	***************************************	NA	•	(\$150.00)	105432
			03/28/16	Test 2	Move to Queue	xxxxxxxxx2226 🔒	999	0	\$110.34	742558
			03/28/16	Kim Test	C Quick Refund	xxxxxxxxx2224		0	\$54.50	742545
			03/28/16		535	xxxxxxxxxx0000	(777)	0	\$1531.56	739549
		Showing	g 1 to 8 of 8 entri	ies.						

account immediately, check the 'Release Funds Immediately' box then click Confirm .

	m Void				
	about to void transaction vent it from settling.	on #105422457. T	his will remove the	a transaction from	n your batch
	ds that were held on the ould like to release the				ch has closed
Rei	ease funds immediately	Ŷ			
			-		1000
			×	Cenosi 🚽	Guniim

Issue a Quick Refund

Much like issuing a void, you can issue a Quick Refund from the transaction's detail page or from the Batch Manager home page. **Note:** A refund can only be issued when a transaction from a batch is settled.

Quick Refund From Batch Manager Homepage:

Step 1: Click on 'Quick		Transaction Detail				۲
Refund (credit)' in the Sale Actions section, on	Batches Batch Manager	Simple Charge Transaction Ap	proved	03/28/16 10:21 am PDT	Options	
the right hand side of the Transaction Detail page.	Quebed Check Manager Upload Manager	Test Three		\$ 207.25	Print Receipt E-Mail Receipt Import to Billing DB	
	Customers Customers Products Products Products Products Preud Manager X Settings S	XOURD XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	Customer Num Auth# Ref# Invoice	0 742573 105422457 8	Gueue Transaction Void Transaction Block Card	
	C	CVV Result • * Not Processed Billing Address	🖦 Shipping Add	ress	Sale Actions Quick Sale Quick Refund (croop)	

Step 2: A pop up window will appear. Fill out the desired fields (Amount, Tax, Invoice, Order ID, PO#, Customer ID, and Description) to process the refund.

The 'Amount' field is the only field required, all the other fields are optional.

Once you have filled out the necessary information, click Refund.

Note: There is no prompt to confirm the refund transaction. Be sure to double check information is correct before processing.

A confirmation message will appear and with one of three responses: 'Transaction Approved', 'Transaction Declined', or 'Error.

\$ 207.25	
\$ Tax	
Invoice	
2 Order ID	
■ PO #	
Customer ID	
Description	

Quick Refund From Batch Manager Homepage:

Step 1: Right click on the transaction, then click 'Quick Refund'.

		NEW NEW	CONSOLE DEMO N	ERCHANT					Search	
ː Dashboard		(\$)	Batch Man	ager			Q @ CK	se Batch	Batch History	Batch Summary Option
Transactions	⊞									
Batches	Θ	m Cu	irrent Batch		-					
Batch Manager Queued Check Manager Upload Manager	Ð	Tota Tota Tota	tch Total al Sales (7) al Vojdied (0) al Credits (2) ch will auto-ciese 03	\$1871.94 \$2022.94 \$0.00 \$151.00	Transac	-	Sales By Source		Sales E	- JCB - Discover - Master - Visa
Products	æ				Sales Void	The second second				
III Reports			Date	Card Holder	Card Type	Card Number	AVS	CN		Auth
Fraud Manager	Θ		03/29/16	Test Three	VISA	xxxxxxxxx2226	MA	(N/	(\$1.00)	105509
X Settings	•		03/28/16	Green		***************************************	9779	M	\$21.80	747431
	G		03/28/16	test 01	VISA	xxxxxxxxxx1111		e	\$9.50	745679
			03/28/16	Test Four		xxxxxxxxx2226	TYY	Ø	\$87.99	742585
			03/28/16	Test Three	VISA	xxxxxxxxx2226		e	\$207.25	742573
			03/28/16	Kim	Q Details	xxxxxxxxx2226	6		\$150.00)) 105432
			03/28/16	Test 2	Move to Queue	xxxxxxxxx2226			\$110.34	742558
			03/28/16	Kim Test	C Quick Refund	xxxxxxxxx2224	TTT	C	\$54.50	742545
			03/28/16		Wi	xxxxxxxxx0000		e	\$1531.56	5 739549
		Showing	03/28/16 g 1 to 9 of 9 entri	les.	11	20000000000000	(11)	C	\$1531.56	5 739549

Step 2: A pop up window will appear. Fill out the desired fields (Amount, Tax, Invoice, Order ID, PO#, Customer ID, or Description) to process the refund.

The 'Amount' field is the only field required, all the other fields are optional.

Once you have filled out the necessary information, click grant Refund

Note: There is no prompt to confirm the refund transaction. Be sure to double check information is correct before processing.

A confirmation message will appear and with one of three responses: 'Transaction Approved', 'Transaction Declined', or 'Error.

\$ 207.25	
\$ Tax	
Order ID	
置 PO #	
Customer ID	
Description	

Quick Sale

The Batch Manager allows you to process a quick sale through a transaction's detail page or the Batch Manager homepage.

Quick Sale From Transaction Detail Page:

Step 1: Click on 'Quick Sale' on the 'Sale Actions' section on the right hand side of the Transaction Detail page.

M Dashboard								
Transactions		Transaction Detail					(
Batches Batch Manager		Simple Charge Transaction App	proved	03/28/16 10:21 am PDT	Options			
Queued Check Manager Upload Manager		Test Three		\$ 207.25	E-Mail Receip	ot		
😤 Customers 🗗 Products 🔟 Reports		VISA XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	Customer Num Auth# Ref#	0 742573 105422457	Queue Trans Void Transac Block Card	action		
 Fraud Manager Settings 	e e	AVS Zip: Address: Match & 5 Digit Zip: Match	Sale Actions	(credit)				
		Eilling Address Test Three N/A	Test Three N/A	155	Related Card Activity			
	-	Transaction Results		Ý	VISA			
		2 Transaction Source		Ŷ				
		VISA Verified By Visa® Authentication		~	Date	AuthCode	Amount	
		En Line Items		~	03/02/16 04:28 am	AuthCode: 553447	\$ 1.00	

Step 2: A pop up window will appear. Fill out the desired fields (Amount, Tax, Invoice, Order ID, PO#, Customer ID, or Description) to process the Quick Sale.

The 'Amount' field is the only field required, all the other fields are optional.

When complete, click 🛒 sale

Note: There is no prompt to confirm the sale transaction. Be sure to double check information is correct before processing.

A confirmation message will appear and with one of three responses: 'Transaction Approved', 'Transaction Declined', or 'Error.

\$ 207.25	
\$ Tax	
1 Invoice	
Order ID	
PO #	
Customer ID	
Description	

Quick Sale From Batch Manager Homepage:

Step 1: Right click on the transaction you want the Quick Sale to associate with, then click 'Quick Sale'.

	-									QE
Dashboard		(\$) E	Batch Mai	nager			Q. O Close	Batch 🛗 Bate	ch History	Summary Op
Transactions	Ð									
Batches	Θ	m Cu	rrent Batch		Transac	tions	Sales By Source		Sales By Ca	ard
Batch Manager					Italisac	uons	ouloo by ocuroo		ouroo by or	
Queued Check Manager		Bat	tch Total	\$1871.94						- JCB
Check Manager Upload Manager			al Sales (7)	\$2022.94						 Discover Master
			I Voided (0)	80,00						Visa
Customers	۲		al Credits (2)	\$151.00 03/29/16 3:00 am PDT						
Products	۲	-				and the second				
Reports		• *	Date	Card Holder	Card Type	Card Number	AVS	CVV2	Amount	Auth
Fraud Manager	Ð		03/29/16	Test Three	VISA	xxxxxxxxx2226	60	NA	(\$1.00)	105509
Settings	Ð		03/28/16	Green	(8)	xxxxxxxxx2226	(m)	0	\$21.80	747431
	G		03/28/16	test 01	VISA	xxxxxxxxxx1111	(m)	0	\$9.50	745679
			03/28/16	Test Four	(0)	xxxxxxxxx2226		0	\$87.99	742585
			03/28/16	Test Three	VISA	xxxxxxxxx2226		•	\$207.25	742573
			03/28/16	Kim	Q Details	xxxxxxxxx2226		NA	(\$150.00)	105432
			03/28/16	Test 2	Move to Queue	XXXXXXXXXX2226	6	0	\$110.34	742558
			03/28/16	Kim Test	E Quick Sale	xxxxxxxxx2224		0	\$54.50	742545
			03/28/16		111	xxxxxxxxxx0000		0	\$1531.56	739549
		Chouring	1 to 9 of 9 eni	teine						

Step 2: A pop up window will appear. Fill out desired fields (Amount, Tax, Invoice, Order ID, PO#, Customer ID, or Description) to process the Quick Sale.

The 'Amount' field is the only field required, all the other fields are optional.

Once you have filled out the necessary information, click 🛒 Sale

Note: There is no prompt to confirm the sale transaction. Be sure to double check information is correct before processing.

A confirmation message will appear and with one of three responses: 'Transaction Approved', 'Transaction Declined', or 'Error.

\$	207.25	
\$	Tax	
1	Invoice	
3	Order ID	
	PO #	
ģ	Customer ID	
8	Description	

Export Your Current Batch

Step 1: To export your current batch, click Options then select 'Export' from the drop down menu.

		NEW C	CONSOLE DEMO	MERCHANT				Search	1	QEA
Dashboard		(\$) E	Batch Mar	nager			Q. S Close Batch	Batch History	III Batch	Summary 🗘 Opti
Transactions	æ			2					1	I Customize Tabl
Batches	Θ	🛗 Cur	rrent Batch							LExport
Batch Manager					Transact	tions	Sales By Source		Sales By	⊖ Print
Queued		Bat	ch Total	\$1872.94	400					🖾 Email
Check Manager		Total	I Sales (7)	\$2022.94	300 - 200 -					Discove Master
Upload Manager			Voided (0)	\$0.00	100	-				• Visa
Customers	æ		I Credits (1)	\$150.00 3/29/16 3:00 am PDT	0 Sales Voids	s Credits				
Products	æ					and and a				
I Reports		- *	Date	- Card Holder	Card Type	Card Number	AVS	CVV2	Amount	Auth
Fraud Manager	Đ		03/28/16	Green	(3)	xxxxxxxxxx2226	A 000	0	\$21.80	747431
Settings	Œ		03/28/16	test 01	VISA	xxxxxxxxxx1111	8 000	0	\$9.50	745679
	G		03/28/16	Test Four		xxxxxxxxxx2226	â (YYY)	0	\$87.99	742585
			03/28/16	Test Three	VISA	xxxxxxxxxx2226	a m	0	\$207.25	742573
			03/28/16	Kim		xxxxxxxxxx2226	ê 🔼	NA	(\$150.00)	105432
			03/28/16	Test 2		xxxxxxxxxx2226	A	0	\$110.34	742558
			03/28/16	Kim Test	DISCOVER	xxxxxxxxx2224	A	0	\$54.50	742545
			03/28/16		531	xxxxxxxxxxx0000	A	0	\$1531.56	739549
		Chamler	1 to 8 of 8 ent							

Step 2: Select the desired file type (CSV, Tab Delimited or a JSON file) in the pop-up window, then click Export.

Your file should automatically download in your browser.

Note: The exported file will only contain information displayed on Batch Manager page. To add more fields into your exported file, see page 19.

▲ Export Bat	ch Manager			
Select Forma	t Tab Delimited	JSON		
			Cance	el Export

Print Your Current Batch

The Batch Manager allows you to print your current batch or previous batches.

Step 1: To print your current batch, click Options then select 'Print' from the drop down menu.

		NEW CONSOLE DEMO MERC	CHANT						Search	QEL
🔬 Dashboard		(\$) Batch Manag	ler				Q () Clo	se Batch 🛛 🛗 Bato	h History	Batch Summary
Transactions	۲						-			E Customize Table
Batches Batch Manager		Current Batch		Trar	sactions	Sales By	Source		Sales By	👄 Print 👩
Queued Check Manager Upload Manager		Batch Total Total Sales (6) Total Volded (6)	\$1851.14 \$2001.14 \$0.00	800 600 400 -			•			 Email Discover Master AmEx
		Total Credits (2)	\$150.00	200		-				
Products	۲	Batch will auto-close 04/09/11	6 1:00 am PDT	Sales	Voids Credits					
		The second se		Card Type	Card Number	AVS	CVV2	Amount	Auth	BatchRefNum
III Reports		🔤 🌱 Date 🔶 C	Card Holder	Card Type	our a ridinider					Sector Sector Sector
Reports	æ		Jane Doe	VISA	x000000000001111	m	0	\$67.39	909579	217007

Step 2: A PDF print window will pop up on web browser, click Print to print your PDF copy.

	Delet		1010000			Real Hange					
	Print				1.1	Batch Manager					
	Total: 1 sheet	of paper				satch Manager		(30 Th	Insections in	n system)	actions in system
Date.			Date			Card Number		2 Amount		Batch	Batch
03/31/16		Cancel Print	03/31/16		Master	1000000002226	WY P	\$0.01		214911	214911
03/31/16		CHIP RAT	03/31/16		Master	0000002226	1007 56	\$0.01		214911	214911
03/31/16			03/31/16		Master	0000000002226	WY M	50.01	814546	214911	214911
03/31/16		and the second se	03/31/16		Vita	managementilii	WY P	\$0.01	814537		214911
03/31/16	Drestination	Color_10_11_41_9	03/31/16		Visit	***************	WY P	\$0.01	814528		214911
03/31/16	Lieuninanoe)	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	03/31/16 03/31/15		Visa	toppoppopplill	TTT P	\$0.01	814517	214911	214911
03/31/16		Change	03/31/16		Visa	000000001111	NA NA	\$0.01	105669	214911	214911
3/31/16		and the second sec	03/31/16		Visa	0000000001111	WY P	\$0.01		214911 214911	214911
03/31/16			03/31/16		Vita	1111boooccutitit	YYYY P	\$0.01		214911	214911
03/31/16	Pages	 All 	03/31/16		Visit	0000000001111	mr P	\$0.01	814482		214911
03/31/16	1 address	(g), (H)	03/31/16 03/31/15		Visa	00000000001111	TTT P	\$0.01	814479		214911
		C 0.0.7-5.0.11-19	03/31/16		Visit	11111000000000	YYY P	\$0.01	814473	214911	
03/31/16		(j) 0.g. 1-0, 0, 11-19	03/31/16		Visa	11110000000000	WW P	\$0.01	814459	214915	214911
03/31/16			03/31/16		Visa	1111/000000000011111	YTT P	50.01		214911	214911
03/31/16			03/31/16		Visa	IIIIIaaaaaaaaa1111	NA NA	\$6.00	105668	214911	214911
03/31/16	Copies	£ + -	03/31/16		Visa	0000000001111	WY P	\$6.00	814378 813514	214911	214911
03/31/16		·	03/30/16	Mke	Vise	commonical fift	YYY P	\$11.50	788751	214911	214911
03/31/16			03/30/16		Visa	0000000002225	XXS M	\$157.00	788119		214911
03/31/16			03/29/16		Visa		WY P	\$900.00	767542		214911
03/31/16	Layout	Portrait 🐨			Visa	10000000011111	WY P	\$11.00	767538		214911
03/31/16			03/22/16		Visa	000000000000000000000000000000000000000	YYY M	\$50.00	695128		214911
03/31/16											214911
03/31/16	Options	Simplify page									214911
03/31/16	or in a										214911
03/30/16		Two-sided									214911
03/30/16											214911
03/30/16	4 More set	ttings									214911
03/29/16	1.										214911
03/29/16		the second se									214911
03/22/16	Print using sys	stem dialog (VSRP)									214911
03/14/16											214911
and the second se	Open PDF in I	Preview									and the second se
	CONTROL OF										
			and the second	Annual Surface and Surgers	and in the	and an interest of the second				46	

Email Your Current Batch

Step 1: To email a copy of your current batch, click Options then select 'Email' from the drop down menu.

		NEW CONSOLE DEMO MERCHANT						Search	QEE
Dashboard		Batch Manager				Q 🛞 Clo	se Batch 🛛 🛗 Bato	h History	Summary Option
Transactions	œ								E Customize Table
Batches Batch Manager	•	im Current Batch	Tra	nsactions	Sales By	Source		Sales By Ca	Export
Queued		Batch Total \$1851.14	800 -						Email L
Check Manager Upload Manager		Total Sales (6) \$2001.14 Total Voiced (0) \$0.00	400						Discover Master AmEx
Customers		Total Credits (2) \$150.00	200	-	-				
Products		Batch will auto-close 04/09/16 1:00 am PDT	Sales	Voids Credits					
Products		Batch will auto-close 04/09/16 1:00 am PDT V Date Card Holder		Voids Credits Card Number	AVS	CVV2	Amount	Auth E	latchRefNum
			Sales		AVS	CVV2	Amount \$67.39	the second se	latchRefNum

Step 2: 'The Email Reports' pop up will appear.

Fill in the fields: 'Your Email', 'Email To', 'Subject', and 'Message'.

Check the Attach box, to attach the PDF report file in the email then click $\begin{tabular}{|c|c|c|} \hline \end{tabular}$ Send Email .

Your Email:									
Email To:									
s	ubject:	Batch ID 221123							
Message:		•							
ttachmer	nt	L							
Attach	File N	ame	Size						

Closing Your Current Batch

The current (open) batch MUST be closed to receive processed funds. Follow these steps to close your current (open) batch:

Step 1: Click Close Batch			W CONSOLE DEMO	MERCHANT					Search	Q 2 2 2	
Step 1: Click Close Batch located in the top right	± Dashboard		Batch Mar	nager			Q (@ Chro	Betro 🖾 Bate	h History	mmuny Ø Optiona	
hand side of your Batch Manager page.	Indiseduction Indiseduction	e B D T	Einstch Transactions Sales By Source Bintch Tobil \$1672.94 0 0 foal Sales (/) \$0023.84 0 0 Table (minit ()) \$180.00 0 0 P Balth will weit salet same 0302912 200 an PD7 0 0 0						Sales By Card		
	In Reports		· Dete	- Card Holder	Card Type	Card Number	AVS	CVV2	Amount	Auth	
		1	03/25/15	Green		303333333332225		0	\$21.80	747431	
	 Fraud Manager X Settings 	10	03/28/16	Inst 01	VISA			•	\$9.50	745879	
			03/28/16	Test Four		xxxxxxxxxx2226	6	0	\$87.99	742585	
		D	03/28/16	Test Three	VISA	xxxxxxxxx2226		•	\$207.25	742573	
		ŤŤ.	03/28/16	Kim	8	000000002226		•	(\$160.00)	105432	
			03/28/16	Test 2	63	0000000002226		0	\$110.34	742558	
		17	03/28/16	Kim Test	150814	xxxxxxxxx2224		0	\$54.50	742545	
		Ц	03/25/16		83	200020000000000		•	\$1531.56	739549	
		Show	ing 7 to 8 of 8 em	7784.							

Step 2: Once you close the batch, a pop up message will appear to confirm if your batch was successfully closed or was not closed due to an error.

Dashboard		(\$) E	Batch Man	ager				Q 🛗 Batel	History	Summary Option
Transactions										
Batches	8	🛗 Ma	arch-29-2016							
Batch Manager		√ S	uccessBatch Clo	osed Successfully. Total Sales:	\$2022.94 (7) Total Credits:					
Queued					Transac	tions	Sales By Source		Sales By Car	rd
Check Manager Upload Manager			tch Total al Sales (7)	\$1071.34	300					JCB Discover
Customers	æ		al Voided (0)	50.00	200					Master Visa
Products		Tota	al Credits (2)	\$151.00	0	-				
LII Reports		0 Balo	ch will auto-close 03/	/29/16 3:00 am PDT	Sales Void	s Credits				
Fraud Manager	æ	•	Date	- Card Holder	Card Type	Card Number	AVS	CVV2	Amount	Auth
K Settings	æ		03/29/16	Test Three	VISA	xxxxxxxxx2226		NA	(\$1.00)	105509
	G		03/28/16	Green		xxxxxxxxx2226	(11)	0	\$21.80	747431
			03/28/16	test 01	VISA	xxxxxxxxxxxx1111	(W)	0	\$9.50	745679
			03/28/16	Test Four	(1)	***************************************	(YYY)	Ø	\$87.99	742585
			03/28/16	Test Three	VISA	xxxxxxxxx2226		0	\$207.25	742573
			03/28/16	Kim		xxxxxxxxx2226	RA	NA	(\$150.00)	105432
			03/28/16	Test 2	8	xxxxxxxxx2226	(YY)	0	\$110.34	742558
							-	-		

Note: You may choose to automatically close your current open batches in your Settings (See page 107).

Batch History

All closed batches can be viewed in your Batch History.

Step 1: To view your previous closed batches, click Batch History located at the top right hand side of your Batch Manager homepage. The image below shows your Batch Manager page after closing an open batch.

		NEW CONSOLE DEMO	MERCHANT					Search	QEA
M Dashboard		(\$) Batch Mar	nager				E Ba	tch History	ch Summary Option
Transactions	œ						-	-0	
Batches	•	Current Batch							
Batch Manager Queued Check Manager Upload Manager				Transactions		Sales By Source		Sales By C	ard
Customers	æ								
Products	Ð								
III Reports		Date Date	- Card Holder	Card Type	Card Number	AVS	CVV2	Amount	Auth
Fraud Manager	œ	No Records found							
X Settings	æ								
	G								

Step 2: To view a closed batch for specific dates, click 'Closed Batches' from the drop down then select the date(s) on the calendar. Once you've selected the dates, click Done.

	March-24-2016	Start o	late						End da	ate						_
Current Batch	March-24-2016	< (Mar		\$) 2	016		¢ (¢	< (Mar		¢) 2	016		¢ (¢	
	🛗 March-25-2016	Su	Mo	Ти	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	les l
	🛗 March-25-2016			i.	2	3	4	5			t.	2	3	4	5	
	🛗 March-29-2016	6	7	8	9	10	11	12	6	7	8	9	10	11	12	
	Current Batch	13	14	15	16	17	18	19	13	14	15	16	17	18	19	
		20	21	22	23	24	25	26	20	21	22	23	24	25	26	
	Closed Batches	27	28	29	30	31			27	28	29	30	31			
	+ Show All Batches			-							-	-				
															Done	

Step 4: A pop up window will appear with all the closed batches for that date. The pop up window provides detailed information about the batch's BatchRefNum, Seq, Date Opened, Date Closed, Errors, Transaction Count, and the Total Amount of each batch.

BatchRefNum	Seg	Openant	Chised	Errors	Count	Amment	-
14506	1	03/26/16/07 34:08	10/29/18 11:55.36		P.	1871.04	Q
14134	τ.	109/26/18 11/26:58	03/25/16 16:48:28		8	3225.82	a
13892	1.	03/24/16 10 12:58	02/26/16 03/01/01		5	143,88	a
213689	4	03/24/16 10:12:21	03/24/16 10:12:46			5.00	a
113874	1	23/24/16 08:31:28	03/24/16 10:12:08		×	14.50	Q
15464	4	03/23/10 07:10:42	03/24/16 03:01:00		à.	5.50	a
15400	1	03/03/18 04:00:30	03/25/16 04:07 14		Ĵ.	3.00	۹
112636	1	03/22/16 08:37:36	03/23/16 03:01:00		8	578:10	Q
212521	1	03/21/10 07:43:47	03/22/16 03:01:01		2	65.20	a
212326	11	00/21/10 02:59:08	03/01/10/03/01/03		2	-1179.50	a
12272	4	03/20/16 23:31:43	03/21/16 02 58:30		57	231,77	a
211825	1	03/19/16 02:29:03	03/20/16 25:31:01		8	381.42	a
211388	4	03/18/16 03:29:02	03/19/16 02:16:00		4	404.50	a
211303	1	00/18/16 02:29:02	03/18/16 03:16:00		2	15.45	a
779906	3	GN/16/16 02:39/02	03/18/16 02:18.01		18.	-3081-28	Q
209716	1	03/16/16 02:58:02	03/16/16 02 16:01		22	1571.30	a.
309467	1	03/14/16 07:57:45	03/16/16 02:48:01		6	6631.47	q
09236	1	03/12/16 02:58:02	03/14/16 07:55:00		4	225.63	a
209116	1	09/11/16 08:29:02	0.938/36.02:34/00		2	539.99	Q
00014	3	00011/18 02:58:02	03/11/1E.08-21.00		4	1060 10	a
06720	4	03/10/16 02:58:02	03/11/16 ((2.31.0)			2.50	a
00015	918	03/09/10 17:27:50	02/10/16 02:31:00		8	-72736.50	q
208504	909	03/09/16 08:03:23	03/09/16 17:27:19		12	2626-85	q

Step 5: To view more details about each batch, click on (a) the icon of each batch.

BatchReiNum	Seq	Opened	Closed	Errors	Count	Amount	
214506	1	03/28/16 07:34:09	03/29/16 11:55:39		9	1871.94	Q
214134	÷.	03/25/16 11:28:58	03/25/16 16:48:28		5	3225.82	0

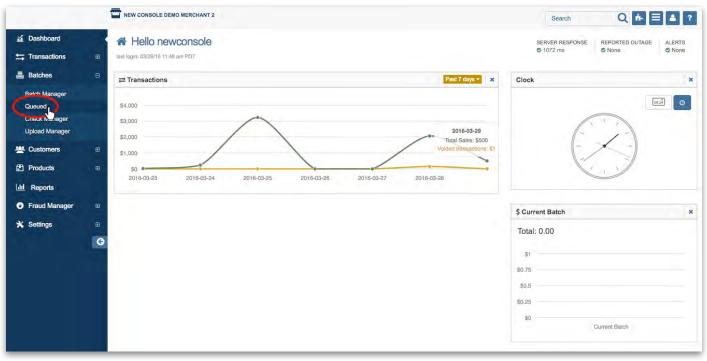
You will then be taken to the batch's summary page. This summary page will contain the Date, Card holder's Name, Card Type, Card Number, AVS, CVV2, Amount, and Auth code by default. To view more fields, you can customizable this table. To customize this table, see page 19.

		NEW CON	NSOLE DEMO M	ERCHANT					Search	
M Dashboard		(\$) Ba	tch Mana	ager				Q. 🗂 Batch	History	Summary Optio
Transactions				5						
Batches		m March	n-29-2016							
Batch Manager					Transac	tions Sa	les By Source		Sales By Car	rd
Queued		Batch	Total	\$1871.94	400					JCB
Check Manager		Total Sa	ales (7)	\$2022.94	300					Discover Master
Upload Manager		Total Vo	oided (0)	50.00	200 -					 Waster Visa
Customers	B		redits (2)	\$151.00	0	-	-			
Products		O This bet	ch was closed 03	3/29/16 11:55 am.	Sales Void	is Credits				
III Reports		• * •	Date	- Card Holder	Card Type	Card Number	AVS	CVV2	Amount	Auth
						0	-			
Fraud Manager			03/29/16	Test Three	VISA	***************************************	NA	NA	(\$1.00)	105509
	æ		03/29/16	Test Three Green	VISA	xxxxxxxxx2226	(NA) (YYY)		(\$1.00) \$21.80	105509
 Fraud Manager Settings 	•									
			03/28/16	Green		xxxxxxxxx2226	600	0	\$21.80	747431
			03/28/16 03/28/16	Green test 01	VISA	xxxxxxxxxxxxx2226 🔒 xxxxxxxxxxxxx1111 🔒	(117) (117)	0	\$21.80 \$9.50	747431 745679

Queued Transactions

To access the Queued Transactions page, click on 'Batches' on the side menu bar of the Dashboard. Then click 'Queued' from the drop down menu to be taken to the 'Queued Transactions' page.

The Queued Transactions page is where AuthOnly transactions are stored, while waiting to be captured. Much like in the Batch Manager, AuthOnly transactions must be captured and settled before they are funded. AuthOnly transactions will remain in Queued Transactions for 30 days or until they have been captured.



Note: Most merchant banks will not allow an AuthOnly transaction to be captured after 10 days. This time period, however, varies from bank to bank. If a transaction remains in the queue for longer than the merchant bank allows, you will need to re-run the transaction to obtain a new authorization code to complete the transaction.

Dashboard			Queued "	Transactions					Q, 🛗 Select Date	Option
Transactions										
Batches	•		3/10/2016 - 03 otal Authorizatio							
Batch Manager			There are (5)	auth-only transactions that will n	ot be settled unless captu	ired.				
Queued Check Manager		- *	Date	Card Holder	Card Type	Card Number	AVS	cvvz	Amount	Auth
Upload Manager		Д	03/30/16	Mary W	VISA	xxxxxxxxxxx2225	XXS	0	\$ 157.0(788119
Customers	۵		03/30/16	Dominique Castano		xxxxxxxxxx2275		8	\$ 866.8	788079
Products	۵		03/30/16	Green	VISA	xxxxxxxxxxx1111	-	0	\$ 1,500.	788019
III Reports			03/30/16	Kim Test	DISCHIVER	xxxxxxxxxx2224	YYY	0	\$ 389.0(787702
Fraud Manager	۵				-		E			
X Settings			03/29/16		8	xxxxxxxxxxx2226	(M)	0	\$ 500.00	766983
	G									

Rearrange Your Table

Your queued transactions are shown in a table including details such as the Date, Card Holder's Name, Card Type, Card Number, the AVS, the CVV2, the Amount of the AuthOnly transaction, and the Authorization (Auth) Code.

By default, your Queued Transactions are arranged by date, with your most recent Auth Only transaction at the top and the oldest AuthOnly transaction at the bottom. This table can be rearranged based on the Card holder's First Name, Card Type, Card Number, Amount, or the Auth Code. To rearrange the table by the card holder's name, for example, click on 'Card Holder' on the top bar of the table.

Dashboard	(Queued	Transactions					Q. 🛗 Select Date	De Option
Transactions									
Batches		total Authorizatio							
Batch Manager		There are (5)	auth-only transactions that will	not be settled unless captu	ured.				
Queued Check Manager		Y Date	Card Holder	 Card Type 	Card Number	AVS	CVV2	Amount	Auth
Upload Manager		03/29/16	U		xxxxxxxxxx2226	(111)	0	\$ 500.0(766983
Customers	•	03/30/16	Dominique Castano	60	xxxxxxxxxx2275	YYY	×	\$ 866.8	788079
Products		03/30/16	Green	VISA	xxxxxxxxxx1111	(111)	0	\$ 1.500.	788019
I Reports		03/30/16	Kim Test	DISCOVER	xxxxxxxxxxx2224		0		787702
Fraud Manager								\$ 389.00	
Settings		03/30/16	Mary W	VISA	xxxxxxxxxxxx2225	003	•	\$ 157.0(788119
	G								

Customize Your Table

Step 1: Customize your Queued Transactions table by adding or removing specific fields. To add or remove fields, click or customize Table' from the drop down menu.

Dashboard			Queued 7	Transactions					Q, 🛗 Sele	ct Date Option
Transactions										E Customize Table
Batches	ē	-	3/10/2016 - 03 Intal Authorization							🛓 Export
Batch Manager Queued		-		auth-only transactions that will	A Martin Contractor		1000		2100 T	➡ Print ➡ Email
Check Manager		*	Date	Card Holder	 Card Type 	Card Number	AVS	CVV2	Amount	Maar
Upload Manager			03/29/16		8	xxxxxxxxxxxx2226	YYY	0	\$ 500	766983
Customers	۲		03/30/16	Dominique Castano		xxxxxxxxxx2275	(11)	8	\$ 866	788079
Products	۵		03/30/16	Green	VISA	xxxxxxxxxxxxx1111		0	\$ 1,50	788019
Reports			03/30/16	Kim Test	DISCOVER	xxxxxxxxxx2224	-	0	\$ 389	787702
Fraud Manager							1.0		\$ 389	5.04
Settings	۵		03/30/16	Mary W	VISA	xxxxxxxxxxxx2225	2015	0	\$ 157	788119
	G									

Step 2: The 'Table Options' pop up window will appear showing your current fields and available fields.

To add more columns into your current batch table, drag and drop a field button into the 'Current Fields' section.

To remove a specific column, click the field button you want to remove and drag onto the 'Available Fields' section.

Current Fie	elds													
III Date	II Ca	rd Holder	🔡 Тура	I Card	Number	AVS	I∎ CVV2	III Am	ount	Auth				
wailable F														
2 VIEW MORE CI	okunnis, pi	ease dirid to	rithe Current P	ielda eadlorr										
Source	10 (E	nvolce	IE Card Le	ivel 🔳 C	AVV I	Transaction	id 🔳 s	tatus	Batch	III Ord	er ID	III Time	III PO #	
III Descrip	tion	III Tax	AVS St	reet 🔳 A	WS Zip	Customer	id 📕	Billing First	Name	I Billing	Last Na	ame I	Billing Company	
Billing S	Street	📰 Billing	g Street 2	🔳 Billing C	lity 🔳 i	Billing State	📕 Billing	Zip I	Billing (Country	III Billir	ng Phone	🔡 Email	
B Shippin	g First N	ame I	Shipping I	Last Name	E Shipp	ing Company	III Shi	oping Stre	et 🔳	Shipping S	treët 2	II Ship	ping City	
Shippin	g State	II Shi	pping Zip	🔳 Shippin	g Country	II Shippin	g Phone	III Curre	ency	Native A	mt I	User	Comments	
E Clerk														
									5) Resel	Default	×	Cancel	0

Step 3: Once you've finished adding or deleting specific fields, click ok. If you want to reset your table to default, click reset Default.

Search for a Queued Transaction

Step 1: To search for a specific transaction, click ^Q located at the top right hand side of your Queued Transactions page. Search for AuthOnly transactions by entering the last four digits of the Card Number, the Cardholder's Name, the Transaction Amount, Authorization Code, or the Transaction ID in the search field.

	NEW NEW	CONSOLE DEMO	MERCHANT						Search	QEE
넓 Dashboard		Queued 1	Transactions						9	m Select Date Option
Transactions									Ca.	
Batches	m 03	/09/2016 - 04	/08/2016							
	Tot	al Authorization	ns (4) \$2617.55							
Batch Manager			ns (4) \$2617.55 auth-only transactions that	will not be settled unless	captured.					
Batch Manager Queued				t will not be settled unless Card Type	captured. Card Number	AVS	CVV2	Amount	Auth	Transaction ID
Batch Manager	0	There are (4) a	auth-only transactions that			AVS	cvv2	Аточит \$ 1,750.	Auth 909729	Transaction ID 105990143

Step 2: As shown in the image below, the merchant is searching for a transaction by a customer's name. Type in the name of the customer. Your Queued Transactions page will automatically show all transactions associated with that specific name.

Date	Card Holder	Card Type	Card Number	AVS	CVV2	Amount	Auth	Transaction ID
04/08/16	Jane Doe	DISCOVER	xxxxxxxxxx2224	m	0	\$ 169.00	909727	105990134
			- Sho	w Expired				

Note: You may also view all the expired transactions associated with your search, by clicking the 'Show Expired' drop down arrow at the bottom of the page.

Search for A Transaction Based on Date:

Step 1: From Your Queued Transactions page, click on Select Date

Dashboard			Queued 1	Transactions						Q m Select	Date Option
Transactions Batches Batch Manager	e	Тс	3/10/2016 - 03 stal Authorization There are (5) a		be settled unless captured.					Today Last 7 days Year to date The previous Month	-C
Queued Check Manager			Data	Card Holder	Card Type	Card Number	AVS	CVV2	Amount	Quarter 1	
Upload Manager			03/30/16	Mary W	VISA	xxxxxxxxxx2225	XXS	0	\$ 157.0	Quarter 2 Quarter 3	
Customers			03/30/16	Dominique Castano	69	************	YYY	8	\$ 866.8	Quarter 4	
Products			03/30/16	Green	VISA	xxxxxxxxxxxx1111	YYY	0	\$ 1,500	Specific Date	
Reports			03/30/16	Kim Test	OCCUPIES.	xxxxxxxxxxxxx2224	(111)	0	\$ 389.0	Date Range	, 1070
Fraud Manager Settings	œ		03/29/16		69	xxxxxxxxxxxxxx2226	YYY	0	\$ 500.0	766983 105504	1327

Step 2: A drop down menu showing the following options: 'Today', the 'Last 7 days', the 'Year-To-Date', the 'Previous Month', 'Quarter 1', 'Quarter 2', 'Quarter 3', 'Quarter 4', a 'Specific Date', and a specific 'Date Range'.

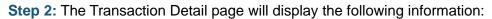
Click one of the options to view your transactions.

Note: You can only view the complete transaction details or edit the amount if the AuthOnly transaction remains open or unsettled.

View A Queued Transaction's Details

Step 1: To view the complete details of a queued transaction, click on the transaction from the table.

		NEV NEV	V CONSOLE DEM	MO MERCHANT					Sean	ch	QEA
ක් Dashboard		Gre	en						-	→ m Se	ect Date Options
Transactions	œ										
Batches		Т	3/10/2016 - 0 otal Authorizatio There are (5)		will not be settled un	less captured.					
Queued Check Manager		•	Date	Card Holder	Card Type	Card Number	AVS	CVVZ	Amount	Auth	Transaction ID
Upload Manager			03/30/16	Mary W	VISA	****************	(005	0	\$ 157.0(788119	105571983
Customers	۲		03/30/16	Dominique Castano		хххххххххххххххх2275	YYY	8	\$ 866.8	788079	105571857
P Products	۵		03/30/16	Green	VISA	xxxxxxxxxxxxx1111	YYY	0	\$ 1,500.	788019	105571665
II Reports			03/30/16	Kim Test	DISCOVER	xxxxxxxxxxxx2224		0		787702	105570678
Fraud Manager	æ						- 24		\$ 389.00		
Settings	Ð		03/29/16			xxxxxxxxxxx2226	YYY	0	\$ 500.00	766983	105504327
	G										



🔬 Dashboard	III Transaction Detail	8
Transactions		
Batches	Simple Charge Transaction Approved 03/30/16 10:29 am PDT	Options
Batch Manager Queued		Print Receipt
Check Manager	Mary W \$ 157.00	E-Mail Receipt
Upload Manager	their the second s	Limport to Billing DB
😬 Customers	• VISA xxxxxxxxxxxxxx2225	2 Capture Authorization
Products	Customer Num 0	Void Transaction
Lill Reports	Address Verification Ref# 105571983	E Block Card
Fraud Manager	XXS AVS Street:	
X Settings	AVS Zip: Service Not Supported	Sale Actions
	CVV Result Ø M	\$ Quick Sale
	Match	Quick Refund (credit)
	Billing Address Shipping Address	
	N/A N/A	Related Card Activity
	☑ Transaction Results	VISA
	2 Transaction Source	
	VISA Verified By Visa® Authentication	Date AuthCode Amount
		03/21/16 Error: Your billing information \$ 5.00 12:56 does not match your credit am card. Please check with your bank.
		03/02/16 AuthCode: 553433 \$ 1.00 04:23 am
		✓ More

- · Customer's name
- Amount of the transaction
- Customer Number
- Transaction's Authorization Code
- Transaction's Reference Number
- Customer's debit or credit card information: last 4 digits of the card number, address verification, the CVV result, the billing and shipping address.
- Transaction Results: Transaction ID, Type of Transaction, Status, Authorization Code, AVS result, CVV result, and Card Level Result
- Transaction Source: User, Source Key, Server IP, and Client IP

Note: The Transaction Results and Transaction Source information can be viewed by clicking on the drop down button as shown in the image above.

The following options will also be displayed:

- Print Receipt
- Email Receipt
- Import to Billing DB (Database) This adds the customer's billing information to your database for recurring billing or payments
- Capture Authorization This closes or settles the Auth Only charge (see pages 40 41 for instructions)
- Void Transaction
- Block Card This blocks the customer's debit or credit card, causing future transactions against the card to be declined.
- Do a Quick Sale or a Quick Refund
- View Related Card Activity the section shows all the transactions made associate with the same card.

Export Your Queued Transactions Data

Step 1: To Export your Queued Transactions data, click Options located at the top right hand side of your page. Select 'Export' from the drop down menu.

		NEW NEW	CONSOLE DE	NO MERCHANT					Sear	ch	QEA
Dashboard			Queued	Transactions						Q = Se	lect Date Options
STransactions	œ										Customize Table
Batches	Θ	_	3/10/2016 - 0 Ital Authorizati								± Export
Batch Manager		0	There are (5)) auth-only transactions that	at will not be settled un	less captured.					🖶 Print
Queued Check Manager		- *	Date	Card Holder	Card Type	Card Number	AVS	CVVZ	Amount	Auth	Email
Upload Manager			03/30/16	Mary W	VISA	*****************	XXS	0	\$ 157.00	788119	105571983
Customers	۲		03/30/16	Dominique Castano		xxxxxxxxxxx2275	YYY	8	\$ 866.8	788079	105571857
Products			03/30/16	Green	VISA	xxxxxxxxxxxx 1111	YYY	0	\$ 1,500.	788019	105571665
<u>III</u> Reports			03/30/16	Kim Test	DSCOVER	*****	YYY	0	*	787702	105570678
Fraud Manager	œ		00.00.10			JUGUNUUUUUUUUUUUU			\$ 389.00		100010010
K Settings	œ		03/29/16		8	******************	YYY	0	\$ 500.00	766983	105504327
	G										
		Showin	ig 1 to 5 of 5 o	antries.							

Step 2: Select the desired file type: CSV, Tab Delimited, or JSON on the pop up window then click **Export**.

Your file will automatically download on your web browser.

Note: The exported file will only contain fields displayed on your Queued Transactions page. To add more fields, see pages 34 - 35.

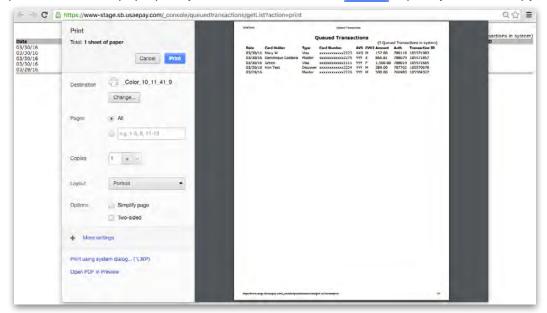
Export Queued Transactions Select Format O CSV Tab Delimited JSON Cancel Export

Print A Copy of Your Queued Transactions

Step 1: To print a copy of your Queued Transactions, click Options located at the top right hand side of your page, then select 'Print' from the drop down menu.

Dashboard			Queued	Transactions						Q m Se	ect Date
Transactions	œ										Customize Table
Batches		_	8/10/2016 - 0 tal Authorizatio								🛓 Export
Batch Manager		0	There are (5)	auth-only transactions that	t will not be settled un	less captured.					
Queued Check Manager		•	Date	Card Holder	Card Type	Card Number	AVS	CVVZ	Amount	Auth	
Upload Manager			03/30/16	Mary W	VISA	xxxxxxxxx2225	XXS	0	\$ 157.00	788119	105571983
Customers	۵		03/30/16	Dominique Castano		xxxxxxxxxx2275	YYY		\$ 866.8	788079	105571857
Products	۵		03/30/16	Green	VISA	xxxxxxxxxxxxxxx1111	YYY	0	\$ 1,500.	788019	105571665
<u>III</u> Reports			03/30/16	Kim Test	DISCHVER	xxxxxxxxxx2224	YYY	0	\$ 389.00	787702	105570678
Fraud Manager	Ð										
K Settings	Ð		03/29/16		8	xxxxxxxxxxx2226	(YYY)	0	\$ 500.00	766983	105504327
	G										

Step 2: A PDF print window will pop up on your web browser, click **Print** to print your PDF copy.



Email A Copy of your Queued Transactions

Step 1: To email a copy of your queued transactions, click Options then click 'Email' from the drop down.

Dashboard		Queued	Transactions						Q, 🛗 Sei	lect Date Options
Transactions	•		03/30/2016							Customize Table Levent
Batches Batch Manager		Total Authorizati There are (5)	ons (5) \$3412.81) auth-only transactions that	will not be settled un	less captured.					🖶 Print
Queued Check Manager		Y Date	Card Holder	Card Type	Card Number	AVS	cvvz	Amount	Auth	Email Nansacuon NS
Upload Manager		03/30/16	Mary W	VISA	xxxxxxxxxx2225	XXS	0	\$ 157.00	788119	105571983
Customers	٠	03/30/16	Dominique Castano		xxxxxxxxx2275	YYY	8	\$ 866.8	788079	105571857
Products	•	03/30/16	Green	VISA	xxxxxxxxxxx1111	•	0	\$ 1,500.	788019	105571665
III Reports		03/30/16	Kim Test	DISCOVER	xxxxxxxxxxx2224	YYY	0	\$ 389.00	787702	105570678
Settings	•	03/29/16			xxxxxxxxxx2226	(YYY)	0	\$ 500.00	766983	105504327
	G									

Step 2: The 'Email Reports' pop up window will appear.

Fill in the following fields: 'Your Email', 'Email To', 'Subject', and 'Message'.

Check the Attach box, to attach a copy of the Queued Transactions then click .

Step 3: Click 🖂 Send Email

Vou			
100	r Email:		
E	mail To:	8	
5	Subject:	Queued Transactions	
M	essage:	•	
Attachme	int		
Attachme	int		
Attachme Attach	File N	ame	Size

Change an AuthOnly Transaction Amount

Your Queued Transactions page lets you change the amount of the AuthOnly transaction charge. Remember, AuthOnly charge amounts are not final and can be changed until the transaction is captured and settled.

As shown in the image below the column 'Amount' is editable. Click on the solution box and enter the new amount.

		NEV	V CONSOLE DEM	IO MERCHANT						Search	
🖬 Dashboard			Queued	Transactions						Q (1	Select Date 🔅 Options -
STransactions	Ð										
Batches			3/10/2016 - 0								
Batch Manager		6	There are (5)	auth-only transactions that will	not be settled unless ca	ptured.					
Queued Check Manager	Í	- *	Date	Card Holder	Card Type	Card Number	AVS	CVV2	Amount	Auth	Transaction ID
Upload Manager			03/30/16	Mary W	VISA	xxxxxxxxxxx2225	(225)	0	\$ H	788119	105571983
Customers			03/30/16	Dominique Castano		xxxxxxxxxxxx2275	-	8	\$ 866.81	788079	105571857
Products	æ		03/30/16	Green	VISA	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX	(111)	0	\$ 1,500.	788019	105571665
III Reports			03/30/16	Kim Test	DISCOVER	xxxxxxxxxxxxx2224	m	0		787702	105570678
Fraud Manager	æ		03/30/10	Kin lost		**************			\$ 389.00	101102	1000/00/0
K Settings			03/29/16			xxxxxxxxxxx2226	YYY	0	\$ 500.00	766983	105504327
	G										
		Showi	ng 1 to 5 of 5 e	ntries.							

Capture An AuthOnly Transaction

You can capture an AuthOnly transaction by two methods:

- From the Queued Transactions page.
- From a transaction's detail page.

From Queued Transactions Page:

Step 1: Right-click on the transaction you want to close, then click 'Capture'.

Transactions		-									
Batches		т	3/10/2016 - 03 otal Authorization There are (5) a	s (5) \$3412.81	nat will not be settled unless ca	otured.					
Queued Check Manager			Date	Card Holder	Card Type	Card Number	AVS	CVV2	Amount	Auth	Transaction ID
Upload Manager			03/30/16	Mary W	VISA	xxxxxxxxxxxxx2225	XXS	0	\$ 157.00	788119	105571983
Customers			03/30/16	Dominique Castanc	Q Details	xxxxxxxxxxx2275		8	\$ 866.81	788079	105571857
Products			03/30/16	Green	C Quick Refund	xxxxxxxxxxxxxxx1111	••••	0	\$ 1,500.	788019	105571665
III Reports	æ		03/30/16	Kim Test	DISCOVER	xxxxxxxxxx2224	YYY	0	\$ 389.00	787702	105570678
K Settings			03/29/16			xxxxxxxxxxx2226	YYY	0	\$ 500.00	766983	105504327
	G										

Step 2: A pop up window will appear to confirm if you want to continue.

Check if the information are all correct, then



Confirm	Transactions

	Cardnumber	Authcode	Orig Amount	Capture Amount
Mary W	xxxxxxxxxxx2225		\$157.00	\$157.00

From the Transaction's Detail Page:

Step 1: From your Queued Transactions page, click on the transaction you wish to capture.

		Gre	en							🗢 🛗 Sel	ect Date 🔅 Optio
Transactions	۳										
Batches	e	-	3/10/2016 - 0 otal Authorizatio								
Batch Manager		0	There are (5)	auth-only transactions that	will not be settled un	less captured.					
Queued Check Manager		- *	Date	Card Holder	Card Type	Card Number	AVS	cvvz	Amount	Auth	Transaction ID
Upload Manager			03/30/16	Mary W	VISA	xxxxxxxxxxx2225	XXS	0	\$ 157.0(788119	105571983
Customers			03/30/16	Dominique Castano		xxxxxxxxxx2275	YYY	8	\$ 866.8	788079	105571857
Products	۲		03/30/16	Green	VISA	xxxxxxxxxxxxx1111	YYY	0	\$ 1,500.	788019	105571665
III Reports			03/30/16	Kim Test	DISCOVER	xxxxxxxxxx2224	YYY	0	\$ 389.00	787702	105570678
Fraud Manager	æ								4 505.01		
X Settings	œ		03/29/16			xxxxxxxxxx2226	YYY	0	\$ 500.00	766983	105504327
	G										

Step 2: Once you click the transaction, you will be taken to that transaction's detail page. On the 'Options' section of the page, click on 'Capture Authorization'.

	1	NEW CONSOLE DEMO MERCHANT 2			Search	Q = 1 ?
i Dashboard ☆ Transactions		Transaction Detail				۲
Batches Batch Manager Queued	P	Simple Charge Transaction Ap	proved	03/30/16 10:29 am PDT	Options Print Receipt	
Check Manager Uploed Menager		Mary W		\$ 157.00	E-Mail Receipt	
整 Customers 한 Products 에 Reports 이 Fraud Manager 文 Settings		VISA xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx	Customer Num Auth# Ref#	5019993 788119 105571983 dress	Capture Authorization Void Transaction Block Card Block Card Sale Actions Suck Sale Guick Retund (credit)	
		N/A	N/A	~	Related Card Activity	7
		VISA Verified By Visa® Authentication			Data AuthCode	Amount

Step 3: A pop up window will appear to confirm the capture.

From this window, you can edit the 'Capture Amount' if necessary.

When complete, click

Confirm

A confirmation will appear on the same window to confirm if the transaction was captured successfully.

	apture transaction id # you sure you would lik		will place the trans	action into your
Original Amount:		e to continue r		
Capture Amount:				

Check Manager

The Check Manager allows you to view and manage all of your Simple ACH transactions. It shows Simple ACH transactions made from month to month. Unlike your Batch Manager and your Queued Transactions, you do not have to close a Simple ACH transaction to process it.

Note: The Check Manager can only be used if you are enabled to process ACH transactions. If you are not currently enabled to process this type of transaction, please contact your reseller.

		NEW NEW	CONSOLE DEMO MERCHANT				Search	Q = 4
Dashboard		()	Check Manager		Q 🛗 Se	lect Date 🛛 🗗 Type:	View All 🛛 🔀 Status	: View All 🔅 Option
Transactions	Œ							
Batches	Θ	₩ 03	/01/2016 - 03/31/2016					
Batch Manager		- *	Customer	Туре	Account	Amount	Auth	Status
Queued Check Manager			Igotta Buyit	Sale	123456789	\$85.00	TMABD1	Pending
Upload Manager			Bill Melater	Sale	151009818	\$125.00	TMADDD	Pending
Customers	Œ		test	Sale	11302920	\$3.33	TM65D0	Volded
Products	æ		test	Sale	11302920	\$10.00	TM9987	Volded
II Reports			dasdew	Sale	11302920	\$22.33	TMD1D2	Volded
Fraud Manager	æ		test test	Sale	11302920	\$10.50	TM531C	Pending
Settings	•		Chuck Check	Sale	11302920	\$15.00	TM2526	Voided
			He there	Sale	456852369	\$1.00	TMA508	Voided

Rearrange Your Table

Your ACH transaction are shown in a table where you can see each of the transaction's details, such as the Customer's name, type of transaction (sale or credit), the customer's account number, the amount of the transaction, the authorization (Auth) code, and the transaction's status.

🔬 Dashboard		(1)	Check Manager		Q 🗎 Se	lect Date 🛛 🖓 Type: V	iew All 🛛 🛃 Status	: View All Options
Transactions	•	m 03	/01/2016 - 03/31/2016			-		
Batch Manager			Customer	Туре	Account	Amount 1	auth	Status
Queued			test reverse	Credit	11302920	(\$1.00)	TMAB11	Pending
Check Manager Upload Manager			He there	Sale	456852369	\$1.00	TMA508	Volded
Customers	Œ		Dani ManagerApproval	Sale	333333	\$2.00	TM4EFB	Pending
Products	Ð		Dani ManagerApproval	Sale	333333	\$2.00	TM58AF	Pending
III Reports			test	Sale	11302920	\$3.33	TM65D0	Volded
Croud Managar	æ							

Transactions from 3/01/2016 to 03/31/2016 are shown in the table. By default, your ACH transactions are arranged by newest to oldest in the table.

If desired, you can rearrange this table based on the customer's name, the type or transaction, the account number, the amount, the authorization code, or the status. For example, to rearrange the table by the amount in ascending order, click on the 'Amount' top bar of the table.

Customize Your Table

Step 1: You can customize your table by adding or removing specific fields.

To add or remove field specific fields, click Options located at the top right hand side of your screen then click on 'Customize Table' from the drop down menu.

M Dashboard		(٢) (٢	Check Manager		Q m Se	elect Date 🛛 🖓 Type:	View All 🛛 🖉 Statu	s: View All 🚺 🏟 Options -
Transactions	۲	en 03	0/01/2016 - 03/31/2016				_	E Customize Table
Batches	0		1/2010 - 03/31/2010					🛓 Export
Batch Manager			Customer	Туре	Account	Amount	Auth	🕀 Print
Queued			Igotta Buyit	Sale	123456789	\$85.00	TMABD1	⊠ Email
Check Manager Upload Manager			Bill Melater	Sale	151009818	\$125.00	TMADDD	Pending
	æ		test	Sale	11302920	\$3.33	TM65D0	Volded
Products	æ		test	Sale	11302920	\$10.00	TM9987	Volded
<u>III</u> Reports			dasdew	Sale	11302920	\$22.33	TMD1D2	Volded
Fraud Manager	Œ							

The 'Table Options' pop up window will appear showing your current fields and available fields.

Step 2: To add more columns into your current batch table, drag and drop a field button into the 'Current Fields' section. To remove a specific column, click the field button you want to remove and drag it onto the 'Available Fields' section.

Step 3: Once you've finished adding or deleting specific fields, click

If you want to reset your table to default,

Click D Reset Default

urrent Fields						
III Customer III 1	ype III Account	田 Amount 田 Aut	fff Station			
vailable Fields						
o fore inset screams, proc	n traffit by Same in	in harter				
E Transaction ID	Effenut EEr	or Maiwage III Error (Code 🔠 Create Dat	A Time I Crease De	in E Crushi Tren	
	o # III Customer	B Recurring Cust I	D III Description	III Comments III Ta	K III Shoping III	Discount
	er III Clerk	E Terricus) E Table	III Source III Se	rverip III Client in	III Check # III Ro	uting
III Effective Date	1 Secred Date	Processed Oale	Returned Date III	lank Noler III Tracking	Code I Account Ty	·pe
III Record Type	Billing First Name	18 Billing Last Name	III Billing Company	III Billing Street III	Billing Street 2 🔠 B	lling City
III Billing State II	Dilling Zip III 0	ling Country III Billing	Phone III Billing B	meil I Shipping Finst	Name III Shipping L	and Name
III Shipping Company	E Shipping Str	ant III Shipping Stream	2 III Shipping City	IB Shipping State	III Shipping Zip III S	Shipping Country
I Shipping Phone						

Export Your Check Manager Data

Step 1: To export your Check Manager data, click Options located at the top right hand side of your page then select 'Export' from the drop down menu.

		NEW NEW	CONSOLE DEMO MERCHANT 2				Search	QEA
넓 Dashboard		(Check Manager		Q m Se	elect Date	View All 🛛 🔀 Statu	s: View All
Transactions								I Customize Table
E Batches		台 03	/01/2016 - 03/31/2016					LExport
Batch Manager			Customer	Туре	Account	Amount	Auth	⊖ Print
Queued			Igotta Buyit	Sale	123456789	\$85.00	TMABD1	⊠ Email
Check Manager Upload Manager			Bill Melater	Sale	151009818	\$125.00	TMADDD	Pending
Customers	Ð		test	Sale	11302920	\$3.33	TM65D0	Volded
Products	æ		test	Sale	11302920	\$10.00	TM9987	Voided
II Reports			dasdew	Sale	11302920	\$22.33	TMD1D2	Voided
Fraud Manager	æ		test test	Sale	11302920	\$10.50	TM531C	Pending
K Settings	Ð		~ ~ ~ ~	~ .	11000000	Air on	TUDEOD	-

Step 2: Select the desired file type: 'CSV', 'Tab Delimited', or 'JSON' file in the pop up window then click **Export**.

Your file should automatically download in your browser.

Note: The exported file will only contain data based on the displayed fields on your Check Manager page. To add more fields into your exported file, see page 43.

Select Form	not		
		JSON	
CSV	Tab Delimited	JSON	

Print Your Check Manager Data

To print your Check Manager Data, follow these steps:

Step 1: Click Options located at the top right hand side of your page then select 'Print' from the drop down menu.

🖬 Dashboard		(1=1) (Check Manager		Q. 🗎 Se	lect Date 🛛 🖉 Type:	View All 🛛 🔁 Statu	s: View All 🤇 🏟 Options
➡ Transactions	Ð	∰ 03/	01/2016 - 03/31/2016					⊞ Customize Table ▲ Export
Batches	Θ	-	Provide and	202	(Annual)		1000	
Batch Manager		- ×	Customer	Туре	Account	Amount	Auth	e Print
Queued Check Manager			Igotta Buyit	Sale	123456789	\$85.00	TMABD1	Email V
Upload Manager			Bill Melater	Sale	151009818	\$125.00	TMADDD	Pending
Customers	æ		test	Sale	11302920	\$3.33	TM65D0	Voided
Products	æ		test	Sale	11302920	\$10.00	TM9987	Volded
III Reports			dasdew	Sale	11302920	\$22.33	TMD1D2	Volded
Fraud Manager	Œ		test test	Sale	11302920	\$10.50	TM531C	Pending
K Settings	Œ							
	G		Chuck Check	Sale	11302920	\$15.00	TM2526	Volded
			He there	Sale	456852369	\$1.00	TMA508	Volded

Step 2: A PDF print window will pop up on your web browser, click Print to print your PDF copy.

	:k Manager tros://www.st	R / Check Mana		inager/export?action=print&	ISAePay Par	tners %2E2	016%20-	62003%2F	31%2F20168	Satatives View%20AU&t	v_ 🗘 i
~	Print	aderacrossepatroout/2-	anage for an okina	ware	concret re	Check of the local division of the local div		92003/821	31/421/20104		1- 12 .
	Print					Check Man					
Customer	Total: 1 sheet	t of paper		10.0					ections in system)	action	is in syster
				Customer Jostfa Buvill	Type Sale	Account 123456789	Amount 85.00	Auth	Statue Pending		
lgotta Buyit Bill Melater		Carcel	Print	Dill Melatar	Sale	151009818	125.00	TMADOD	Pending	ng	
		Concerned and		Test T	Sale	11302920	3.33	TM65D0 TM9987	Voided	ng	
est			_	desdew	Sale	11302920	22.33	THDID2	Voidesi		
est .		Color 10 11 41	0	Inst test Druck Check	Sale	11302920	10.50	TM531C TM2526	Pending Voided	2	
lasdew	Destination	COIOF_10_11_41	.a.	The There	Sale	456852308	1.00	TMA508	Voided	a	
est test		C all official and		test	Sale	9900000002 11302938	236.82 20.00	THFEES	Voidesi Pending	79	
Chuck Check		Change		test revenie	Gredit	11302920	1.00	TMAB11	Pending	b	
le there				Brandon Dani ADNApprover	Sale Gredit	1234213523	135754.6	1M8627 TH7888	Vokled	4 4 4 6 6 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8	
est.	Destas	10.00		Dani ADMapprove	Sale	12346789	5.00	TM25F6	Voided	6	
est	Pages	a Al	_	Bani ADtApprove	Credit	12346789	5.00	11/2278	Pending	ing	
est reverse				Jerry Silva Jerry Silva	Sale	204734750 204734750	17.00	TH/5662	Pending	ng	
Srandon		0.07-5,811-13		testing ach	Sale	9900000002	3216.07	THUGAD	Pending	6	
Dani ACHApprove				Maria Hernardez 30 Retro	Sale	254734750 591791129	20.00	TM0243 TM2082	Voided Voided	b	
Dani ACHApprove				30 Fetra	Sale	591791129	65.00	THOAE9	Voideal.	bb	
ani ACHApprove	Copies	1 + -		3D Retro kovie test	Sale	591791129 895559674	65.00	TM9C7D TM9708	Pending	ng	
enny Silva	copies			kayta test	Sale	945212369	20000.00	THEF56	Pending	ng	
enny Silva				Dani ACHApprove Dani ManaperApproval	Sale	12346789	5.00	TH35CI TH3440	Pending	ng	
esting ach				Bani ManagerApproval	Sale	333333	0905.95	TMCJSD	On Huld	ng	
Aaria Hernandez	Layout	Portrait		Darii Manager#pproval Dani Manager#pproval	Sale Sale	333333	2.00	THISTE	Pending	0	
BD Retro			_	Dani AOlikoprove	Sale	12346789	5.00	TM/025	Pending	5	
3D Retro				Dani ACHApprove	Oredit	12346789	3.00	TMRSEO	Pending	d	
3D Retro	Options	Simplify page		Deni Manager&pproval Deni Manager&pproval	Sale	333333	9.00	THSEAF	Pending .	na	
käylä test				Dani ManagerApproval	Credit	333333	9.00	THESAA	Pending On Hold	ng	
kayla test		Two-sided		Dani ManagerApproval Dani ACNApprove	Sale	12346789	5.00	110387	Pending	Ing	
Dani ACHApprove			_	kayla test	Sele Credit	\$45213366 895556674	20000-00	THALAT THREE	Pending	ng	
Dani ManagerAppre	+ More se	and an and a second sec		3D Retro	Sale	591791129	65.00	TMP47C	Pending	ng	
Dani ManagerAppre	+ MORESS	conges.		30 Retro 30 Retro	Credit	591793129 501701120	65.00	1M0805 TH2677	Pending	bld	
Jani ManagerAppre			_	3D Netro Jenny Silva	Credit.	204734750	17.00	TM4C3#	Panding	na	
Dani ManagerAppre	Deles inter al	stem dialog (X36P)		testing ach	Sale	990000002	3216.87	THOAD	Pending	10	
Dani ACHApprove	Print Loang Sp	referris describini (il selle)								The second	
Dani ACHApprove	Open PDF in	Province									
Dani ManagerAppre	short we we									10	
Dani ManagerAppri											
Dani ManagerAppre				Number and support of	All Company of the	Committee of the		PLANA PROPERTY AND	The American Street	ng	
Dani ManagerAppri										and the second second	
Dani ACHApprove			Sale	12346789		5.00		-	M03B7	Pending	
cavia test			Sale	945212369		20000.00			MA1A7	Pending	
ayla test			Credit	895559674		23.00			M71D1	Pending	
3D Retro			Sale	591791129		65.00			MF47C	Pending	
ID Retro			Credit	591791129		65.00			M0806	Pending	
ID Retro			Sale	591791129		65.00			M7677	Pending	
lenny Silva			Credit	204734750		17.00			M4C38	Pending	
testing ach			Sale	990000002		3216.87			MOADE	Pending	

Email Check Manager Data

Step 1: To email a copy of your Check Manager data, click Coptions - then select 'Email' from the drop down menu.

Transactions	Œ						The second second
	1.25.1	3/01/2016 - 03/31/2016					Customize Table
Batches	•						La Export
Batch Manager		Y Customer	Туре	Account	Amount	Auth	⊖ Print
Queued		Igotta Buyit	Sale	123456789	\$85.00	TMABD1	🖾 Email 🔥
Check Manager							
Upload Manager	11	Bill Melater	Sale	151009818	\$125.00	TMADDD	Pending
Customers	•	test	Sale	11302920	\$3.33	TM65D0	Voidad
Products	•	test	Sale	11302920	\$10.00	TM9987	Volded
II Reports		dasdew	Sale	11302920	\$22.33	TMD1D2	Volded
Fraud Manager	⊕	test test	Sale	11302920	\$10.50	TM531C	Pending
Settings	•	Chuck Check	Sale	11302920	\$15.00	TM2526	Voided
	G	UNION UNDER	Gale	11002020		1112020	

Step 2: Fill in the following fields in the pop up window: 'Your Email', 'Email To', 'Subject', and 'Message'.

Check the Attach box, to attach a copy of the Check Manager data in the email.

Click Send Email to email your Check Manager data.

Your	Email:	B	
En	nail To:		
S	ubject:	Batch ID 221123	
Me	ssage:		
ttachmer	nt		
ttachmer			
ttachmer Attach		Name	Size

Search For A Transaction

Step 1: To search for a specific transaction, click on the ^a icon located at the top right hand side of your Check Manager page. A transaction can be search by typing in the customer's name, account number, amount, or authorization code.

		T NEW C	CONSOLE DEMO MERCHAN	т			Search	QEA
🖬 Dashboard			Check Manager			ि्री 🖄 Select Date	🖓 Type: View All	Status: View All Options
➡ Transactions ➡ Batches	•	₩ 03/	18/2016 - 04/01/2016	1		~		
Batch Manager		•	Customer	Туре	Account	Amount	Auth	Status
Queued Check Manager			lgotta Buyit	Sale	123456789	\$85.00	TMABD1	Pending
Upload Manager			Bill Melater	Sale	151009818	\$125.00	TMADDD	Pending
🖳 Customers	æ		test	Sale	11302920	\$3.33	TM65D0	Volded
Products	æ		test	Sale	11302920	\$10.00	TM9987	Voided
III Reports			dasdew	Sale	11302920	\$22.33	TMD1D2	Voided
Fraud Manager	æ		test test	Sale	11302920	\$10.50	TM531C	Pending

Step 2: Your page will automatically display all the transactions associated with the criteria you entered.

M Dashboard		Search			→ 🗎 Select	Date 🛛 Type: View All	Status: View All Options -
Stransactions	۲						
Batches							
Batch Manager		Customer	Туре	Account	Amount	Auth	Status
Queued		test	Sale	11302920	\$108.99	TMFD46	Pending
Check Manager Upload Manager		gdf	Sale	11302920	\$5.45	TMD722	Pending
Lustomers	۲	test	Sale	11302920	\$5.45	TM8808	Pending
Products	æ	test	Sale	11302920	\$10.90	TMBCC6	Pending
III Reports		TEST 2	Sale	11302920	\$5.45	TMBF9E	Pending
Fraud Manager	•	testing void	Sale	990000002	\$2315.64	TM2D22	Pending

You can also search for a transaction by Date, its Type, and Status:

Search By Date:

Step 1: Click select Date on upper right hand side of the Check Manager page.

	NEW CC	INSOLE DEMO MERCHANT				Search	QE
Dashboard	C C	neck Manager		C m Se	lect Date	View All 🛛 🔁 Status	: View All 🔹 Options
Transactions							
Batches	tt 03/0 €	1/2016 - 03/31/2016					
Batch Manager	• *	Customer	Туре	Account	Amount	Auth	Status
Queued		Igotta Buyit	Sale	123456789	\$85.00	TMABD1	Pending
Check Manager Upload Manager		Bill Melater	Sale	151009818	\$125.00	TMADDD	Pending
Customers		test	Sale	11302920	\$3.33	TM65D0	Voided
Products		test	Sale	11302920	\$10.00	TM9987	Volded
II Reports		dasdew	Sale	11302920	\$22.33	TMD1D2	Voided

Step 2: This feature lets you view transactions based on 'Today', the 'Last 7 days', 'The Previous Month', 'Quarter 1', 'Quarter 2, 'Quarter 3', 'Quarter 4', a 'Specific Date', and a specific 'Date Range'. Select the date(s) you want to view. Your page will automatically transactions for the selected time period.

	1.0												144	
Transactions	Ð	-		Today	Speci	fic Dat	e							
Batches	Θ	₩ 03/0	11/2	Last 7 days	<	Mar		0 2	016		3 >			
Batch Manager		• *	GL	Year to date	Su	Mo	Tu	We	Th	Fr	Sa	ount	Auth	Status
Queued			10	The previous Month			1	2	3	4	5	5.00	TMABD1	Pending
Check Manager			lge	Quarter 1	6	7	8	9	10	11	12	0.00	INABUT	rending
Upload Manager			Bil	Quarter 2	13	14	15	16	17	18	19	25.00	TMADDD	Pending
				Quarter 3	20	21	22	23	24	25	26			
Customers	Œ		tes	Quarter 4	27	28	29	30	31			33	TM65D0	Volded
Products	æ		te	Specific Date							Done	0.00	TM9987	Volded
III Reports				Date Range							Done			
			da	Date hange							_	2.33	TMD1D2	Volded
Fraud Manager	Œ		test	test	Sale		1	13029	20		5	10.50	TM531C	Pending
X Settings	œ													1.00
	G		Chu	uck Check	Sale		1	13029	20		\$	15.00	TM2526	Volded

Search by Type (Sale, Credit, or Refund):

The Check Manager lets you view the following options: View All, Refund, Sale, or Credit transactions. **Step 1:** Click Type: View All on upper right hand side of the Check Manager page.

	Check Manager		۹ 🖿	Select Date 🛛 🖓 Type:	View All	: View All Options
				View All	CO Refund	
*	Customer	Туре	Account	Sale 🗸	Credit	Status
	Igotta Buyit	Sale	123456789	\$85.00	TMABD1	Pending
	Bill Melater	Sale	151009818	\$125.00	TMADDD	Pending
	test	Sale	11302920	\$3.33	TM65D0	Volded

Step 2: Check the box of the type of transaction you want to see. For example, the image shown below that a merchant has selected 'Credit'. Once the 'Credit' box is selected, the page automatically lists all your credit transactions.

D 0	Check Manager		۹ 🗈	🖞 Select Date 🛛 📝 Type	e: Credit 🛛 🕗 Status	: View All 🗢 Options -
₩ 03/0	01/2016 - 03/31/2016				Refund	
•	Customer	Туре	Account	Sale 🗸 (Credit	Status
	test reverse	Credit	11302920	(\$1.00)	TMAB11	Pending
	Dani ACHApprove	Credit	12346789	\$5.00	TMFB8B	Volded
	Dani ACHApprove	Credit	12346789	(\$5.00)	TM707B	Pending

Search by Status:

The Check Manager allows you to view the status of the transaction: Submitted, Time-Out, Mgr Approval, Settled, Voided, Pending, and Returned.

Step 1: Click Status: View All on the upper right hand side of the Check Manager page.

Ch	neck Manager		٩	🛗 Select Date	🗗 Type: View All	Status: V	iew All 🗢 Options -
₩ 03/01	/2016 - 03/31/2016			View All	Submitted	Timed-	Out
•	Customer	Туре	Account	Mgr Approval	Settled Returned	Voided	s
	Igotta Buyit	Sale	123456785			- 111/100 1	ding
	Bill Melater	Sale	151009818	\$125.0	00	TMADDD	Pending

Step 2: Check the box of the type of transaction you want to see. For example, the image below shows that a merchant has selected 'Voided'. Once the 'Voided' box is selected, the page automatically lists all your voided transactions.

s=1) (Check Manager		٩	🛗 Select Date	☑ [™] Type: View All	Status: Void	🗢 Options 🗸
∰ 03/	01/2016 - 03/31/2016			View All	Submitted	Timed-Out	0
- *	Customer	Туре	Account	Mgr Approval	Settled	Voided	5
	test	Sale	11302920				berread
	test	Sale	11302920	\$10.00	TM	9987	Volded

View a Transaction's Details

In your Check Manager page, you can view a transaction's complete details by two methods: by rightclicking on the transaction then selecting 'Details' or by clicking on the transaction to be directed to the transaction detail page.

Step 1: To be directed to the transaction's detail page, click on the transaction from the table.

A Dashboard		1	Check Manager			Q. Market Date	Type: View All	Status: View All Options -
Transactions	æ	A 03/	01/2016 - 03/31/2016					
Batches	Θ	⊞ 03/	01/2016 - 03/31/2016					
Batch Manager			Customer	Туре	Account	Amount	Auth	Status
Queued Check Manager		(Igotta Buyit	Sale	123456789	\$85.00	TMABD1	Pending
Upload Manager			Bill Melater	Sale	151009818	\$125.00	TMADDD	Pending
🐣 Customers	œ		test	Sale	11302920	\$3.33	TM65D0	Voided
Products	æ		test	Sale	11302920	\$10.00	TM9987	Volded
III Reports			dasdew	Sale	11302920	\$22.33	TMD1D2	Voided

Step 2: Once you click the transaction from the table, you will be taken to a new page: the 'Transaction Detail' page as shown in the image below.

📓 Dashboard		Transaction Detail		×
Stransactions	æ			
Batches	Θ	Simple ACH Transactio	n Approved 03/31/16 08:46 am PDT	Options
Batch Manager				Print Receipt
Queued Check Manager		Inotto Duvit	¢ 05 00	 E-Mail Receipt
Upload Manager		Igotta Buyit	\$ 85.00	Import to Billing DB
👑 Customers	æ			Void Transaction
Products		Account: 123456789 Routing: 307070267	Customer Num 0	
Lill Reports		Rodding. 307070207	Auth# TMABD1	
 Fraud Manager 	œ		Ref# 105650046	Sale Actions
X Settings		Billing Address	Shipping Address	\$ Quick Sale
	G	N/A	N/A	S Quick Refund (credit)
		Transaction Results	<u></u>	
			<u></u>	
		Transaction ID:	105650046	
		Туре:	Simple ACH	
		Status:	Pending	
		Auth Code:	TMABD1	

This page displays the following information:

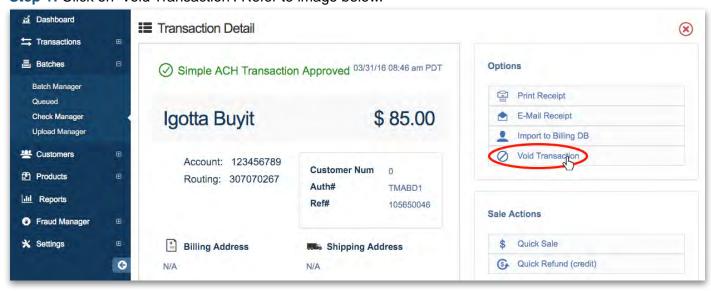
- Customer's name
- Amount of the transaction
- Customer ID number, the transaction's authorization code, and the reference number.
- Customer's account and routing number
- Customer's billing and shipping address
- Transaction Results: the transaction ID, type of transaction, status, and authorization code.
- Transaction Source: the user, source, Server IP, and Client IP.
- Check Details: the effective date, check format, customer's name, check number, account number, routing number, account type, tracking code, and transaction data.

Note: The Transaction Results, Transaction Source, and Check Details can be viewed by clicking on the drop down button.

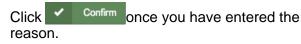
Void A Transaction

You can void a transaction and give the customer a refund from a transaction's detail page or from rightclicking the transaction from the Check Manager page.

Void a transaction from a transaction's detail page: Step 1: Click on 'Void Transaction'. Refer to image below.



Step 2: A pop up window will appear to confirm the void, prompting you to enter a reason for the void. This field is required.



ons					
want to void thi	is transaction?				
		×	Cancel	1	Confirm
			u want to void this transaction?	u want to void this transaction?	u want to void this transaction?

Void a transaction from the Check Manager homepage:

Step 1: From the Check Manager homepage, right click on the transaction you want to void.

		NEW C	ONSOLE DEMO MERCHAN	Τ 2			Search	QEL
🔬 Dashboard		C C	heck Manager			Q, 🛗 Select Date	Type: View All	Status: View All Options
Transactions	۲							
Batches	Θ	∰ 03/1	18/2016 - 04/01/2016					
Batch Manager		- *	Customer	Туре	Account	Amount	Auth	Status
Queued			Igotta Buyit	Sale	123456789	\$85.00	TMABD1	Pending
Check Manager Upload Manager			Bill Melater	Q Details	151009818	\$125.00	TMADDD	Pending
😤 Customers	Ð		test	R Quick Sale	11302920	\$3.33	TM65D0	Volded
Products	æ		test	C Quick Refund	11302920	\$10.00	TM9987	Voided
III Reports			dasdew	Sale	11302920	\$22.33	TMD1D2	Voldad

Step 2: A pop up window will appear to confirm the void, asking you to enter a reason for the void. This field is required.

Click Confirm once you have entered the reason.

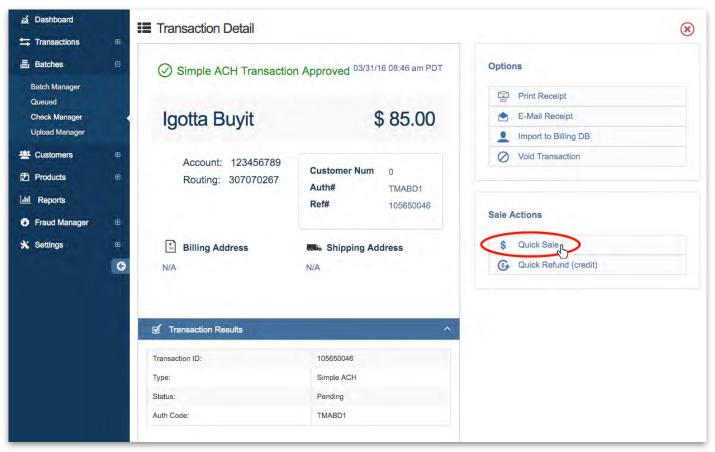
Are you sure you want to v	oid this transaction?	
Reason		

ACH Quick Sale

The Check Manager allows you to do a Quick Sale transaction through a transaction's detail page or the Check Manager homepage.

ACH Quick Sale From A Transaction's Detail Page:

Step 1: From a transaction's detail page, click on 'Quick Sale'. Refer to image below.



Step 2: The Quick Sale pop up window will appear. Fill out the following fields to process the sale: Charge Amount, Tax, Invoice, Order ID, PO#, Customer ID, and Description.

Note: The 'Charge Amount' field is the only required field to process the sale. The sale will use the same information (such as the customer's account number and routing number) to process the transaction.

Once you have completed the fields and if all the information is correct, click sale.

\$	Charge Amount	
\$	Тах	
	Invoice	
Î	Order ID	
	PO #	
Ľ.	Customer ID	
0	Description	

ACH Quick Sale from Check Manager Homepage:

Step 1: Right click on the transaction you want the transaction to associate with, then click 'Quick Sale'.

🖬 Dashboard		C	heck Manager			Q. 🛗 Select Date	Type: View All	Status: View All Options
Transactions	œ							
Batches	Θ	₩ 03/1	8/2016 - 04/01/2016					
Batch Manager		•	Customer	Туре	Account	Amount	Auth	Status
Queued Check Manager			Igotta Buyit	Sale	123456789	\$120.00	TMF64A	Pending
Upload Manager			Igotta Buyit	Sale	123456789	\$85.00	TMABD1	Pending
Customers	œ		Bill Melater	Q Details ➡ Void	151009818	\$125.00	TMADDD	Pending
Products	۵		test	R Quick Sale	11302920	\$3.33	TM65D0	Volded
III Reports			test	C Quick Refund	11302920	\$10.00	TM9987	Voided
Fraud Manager	æ		dasdew	Sale	11302920	\$22.33	TMD1D2	Volded
X Settings	æ		tort tort	Salo	11202020	\$10.50	TMERIC	Bandias

Step 2: The Quick Sale pop up window will appear.

Fill out the following fields to process the sale: Charge Amount, Tax, Invoice, Order ID, PO#, Customer ID, and Description.

Note: The 'Charge Amount' field is the only required field to process the sale. The system will use the same information (such as the customer's account number and routing number) to process the transaction.

Once you have completed the fields and if all the information is correct, click sale.

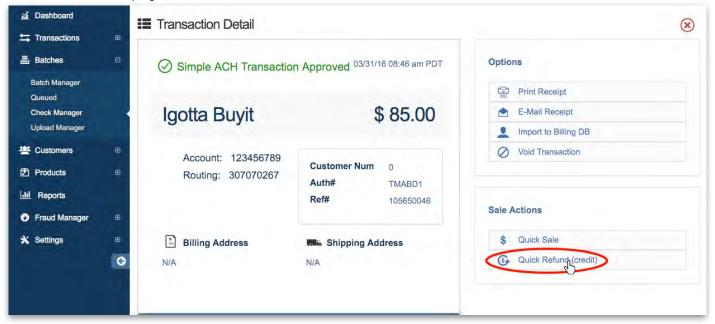
\$	Charge Amount	
\$	Тах	
	Invoice	
1	Order ID	
1	PO #	
ġ.	Customer ID	
0	Description	

Issue an ACH Quick Refund

Much like issuing a void, you can issue a Quick Refund from a transaction's detail page or from the Check Manager homepage.

ACH Quick Refund from a Transaction's Detail Page:

Step 1: Click on 'Quick Refund (credit)' in the Sale Actions section, on the right hand side of the Transaction Detail page.



Step 2: A pop up window will appear. Fill out the refund or credit information fields (Amount, Tax, Invoice, Order ID, PO#, Customer ID, and Description) to process the refund.

Once you have filled out the necessary information, click Sefund

Note: The Amount field is the only field required, all the other fields are optional. The system will use the same information (such as the customer's account number and routing number) to process the transaction.

\$ 120.00				
\$ Tax				
Invoice	2			
Order ID)			
🖹 PO #				
Custome	er ID	_		
Descript	ion			

ACH Refund from the Check Manager homepage:

Step 1: Right click on the transaction you wish to issue a refund to, then click 'Quick Refund'.

		NEW (CONSOLE DEMO MER	CHANT			Search	Q = 4 ?
🔬 Dashboard			Check Mana	ger		Q, 🛗 Select Date	Type: View All	Status: View All Options -
S Transactions								
Batches		曲 03/	18/2016 - 04/01/2	2016				
Batch Manager		- *	Customer	Туре	Account	Amount	Auth	Status
Queued			Igotta Buyit	Sale	123456789	\$120.00	TMF64A	Pending
Check Manager				Q Details				
Upload Manager			Igotta Buyit	✓ Void	123456789	\$85.00	TMABD1	Pending
😤 Customers			Bill Melater	T Quick Sale	151009818	\$125.00	TMADDD	Pending
Products			test	C Quick Refund	11302920	\$3.33	TM65D0	Volded
III Reports			test	Sale	11302920	\$10.00	TM9987	Volded
Fraud Manager			dasdew	Sale	11302920	\$22.33	TMD1D2	Volded
X Settings			dusden	000	11002020	422.00	THETEL	
	G		test test	Sale	11302920	\$10.50	TM531C	Pending

Step 2: A pop up window will appear. Fill out the refund or credit information fields (Amount, Tax, Invoice, Order ID, PO#, Customer ID, and Description) to process the refund.

Once you have filled out the necessary information, click 🧉 Refund

Note: The Amount field is the only field required, all the other fields are optional. The system will use the same information (such as the customer's account number and routing number) to process the transaction.

\$	120.00		
\$	Тах		
	Invoice		
2	Order ID		
	PO#		
Ľ.	Customer ID		
0	Description		

Upload Manager

The Upload Manager displays all of your uploaded credit card and check transactions.

Follow these steps to upload a new batch:

Step 1: From the Upload Manager homepage, click ^{L Upload New Batch} located on the upper right hand side of the page.

		NEW CONSOLE DEM	OMERCHANT				Search		Q = 4 ?
Dashboard		1 Upload Ma	anager						
Transactions	œ						Q. (11)	Select Date	2. Upload New Batch
Batches	Θ	-	515			- and the second	a marine		Alere.
Batch Manager		Date Cate	File	Status	Transactions	Remaining	Approved	Declined	Errors
Queued									
Check Manager									
Upload Manager									
Customers	œ								
Products	Œ								
III Reports									
Fraud Manager	œ								

Step 2: Choose The File: Select the file to import or drag and drop the file(s) into the drag & drop window. It is recommended that you use a comma separated text format for importing.

Note: If you are using Excel to create your batch field, make sure to set the cell format of the "CCNum" column to text before entering numbers. Switching the format after entering card numbers could corrupt the numbers.

1.Choose File	2.Golumn Mapping	3.Varity	4 (Jpland Processing)
ease note, if you are us		eld, make sure to	ke to import. It is recommended that you use a comma separated text format for importing set the cell format of the conum column to text before entering numbers. Switching the
			*
	1	Drag & I	Drop Files Here
			(or click)

Step 3: Column Mapping: Click on the - Select Field - + drop down to match fields for each column. Select the field descriptor that best describes the data in that column.

1.Choose File	2.Column Mapp	ing 3.Verily	4.Upload Processing			
The following is a pre	view of what will be importe	d. Please confirm the inform	ation and click Start upload to	o import your transactions.		
- Select Field -	- Select Field - 💠	- Select Field - 💠	- Select Field - 💠	- Select Field - 💠	- Select Field - 🜩	- 5
UMcard	UMexpir	UMamount	UMinvoice	UMname	UMstreet	UM
5403850025023540	1216	1	234	UPLOAD1	123 Main St.	900
	1216		234	UPLOAD2	123 Main St.	900

Once you have matched all the fields, click Next> . To make changes, click <Prev

Step 4: Verify: Verify the columns are tapped to the	L Upload New Batch							
correct field.	1.Choose File	2.Column Mapping	3.Verify	4.Upload Processing				
Click Next to continue to the next step.								
	Close				€Prev Next			

Step 5: Upload Processing: Your batch upload will process once you click Next. The pop up page will display if your batch is uploaded successfully, showing the number of imported transactions, skipped transactions, and remaining transactions.

1.Choose File	2.Column Mapping	3.Verify	4.Upload Processing	
⊘ Remaining	✓ Imported		Ø Skipped	
0	7		3	

Click Close to be directed to the Upload Manager homepage.

From the Upload Manager page, you can do the following:

- · View the upload status of the batch
- View the uploaded transaction and the remaining transactions to be uploaded from the batch.
- Check the amount of Approved, Declined, and Errors from the uploaded batch.
- Select any of the batches to view, view the upload status, review, email, import to your billing database, block a card, do a quick sale, and issue a quick refund for each transaction.

		NEW C	ONSOLE DEMO MERC	CHAN I				Search	C	
Dashboard		1.Up	load Manag	jer						
Transactions	Œ							Q, 1111	Select Date	Jpload New Bat
Batches	Ξ		Date	File	Status	Transactions	Remaining	Approved	Declined	Errors
Batch Manager Queued Check Manager Upload Manager			04/01/16 12:11	Batch Upload Template (test 16).csv	Uploading	Q 11	Q 11	0	0	0
Customers	Ð									
Products	Ð									
<u>III</u> Reports										
Fraud Manager	æ									
K Settings	Ð									
	G									

To view your uploaded or uploading batches, click Belect Date

You can view all your Pending Batches, Running Batches, Paused Batches, Completed Batches, a batch from a specific date, and batches from a specific date range.

Ճ Dashboard ➡ Transactions	æ	1 Up	oload Manag	ger			Q # 50	iect Date 🔔 L	pload New Ba
Batches	8	- *	Date	File	Status	Transactions	Pending Batches Running Batches	alined	Errors
Batch Manager			04/01/16 12:26	Batch Upload Template (test 16).csv	Uploading	Q 11	Paused Batches		0
Queued							Completed Batches	-	
Check Manager							Specific Date	э.	
Upload Manager							Date Range	F.	
Customers	æ								
Products	æ								
III Reports									
Fraud Manager	Ð								
K Settings	œ								

Customer Database

Set up and monitor recurring billing for multiple customers in the Customer Database. Recurring billing customers (active and inactive) and all customers imported to database (from 'New Order' tab and from Transaction Detail pages) are stored in the Customer Database. Recurring billing is the ability to bill a customer in specified intervals, including daily, weekly, monthly, or annually.

Note: Recurring billing can be processed through credit cards, ACH, and gift cards. To have recurring billing enabled, please contact your reseller.

To access the Customer Database, click on 'Customers' on the side menu bar. Click 'Customer Database' on the drop down menu.

		NEW C	ONSOLE DEMO ME	RCHANT		Search Q = 🔺
🖬 Dashboard		20	Customer [Database		
Transactions	Œ					Q 🗂 Select Date + Add Customer 🕹 Import 🖽 Grid Edit 😻 Option
Batches	æ		Customer ID	Company	Last Name	Billing Schedules
Lustomers	Θ		4785472	Some Co.	Testing	\$6.00 Every month on the twenty first day, in the amount of \$6.00, with 8 remaining payments and due next
Customer Database Billing History		E	4808878		Silva	on 2016-03-21.
Add Customer			4811881		u	
Products	•		4811956	Group Home	Kayla	
Reports Fraud Manager	Œ		4816504	OtherLLC	VISACust	\$6.00 Every week on Monday, in the amount of \$6.00, with 1 remaining payments and due next on 2016-03- 21.
K Settings	æ		4816507	TheBest	MASTCust	\$25.00 Every third month on the twenty first day and the twenty eighth day, in the amount of \$25.00, with 11 remaining payments and due next on 2016-03-21.
	G		4816510	TheWorst	SCHEDULE	\$215.23 Every month on the eighteenth day and the third Sunday, in the amount of \$215.23, with 0 remaining payments and due next on 2016-03-18.
			4816513	ThatCo	Ediscovercust	\$5.00 Every week on Monday and Tuesday, in the amount of \$5.00, with 50 remaining payments and due ne on 2016-03-21.

Rearrange Your Table

By default, the 'Customer Database' table is arranged from newest customer(most recent customer on record) to oldest (first customer on record). The table can also be rearranged based on the Customer ID, Company name, or Last Name. For example, to rearrange the table by the Customer ID click on 'Customer ID' on the top bar of the table.

-	Customer E)atabase		Q, 🗂 Select Date + Add Customer 🛓 Import Ⅲ Grid Edit & Options
- (Customer ID	Company	Last Name	Billing Schedules
	5028297	USAePay	Oganesyan	
	4885239		Three	\$0.01 Every week on Friday, in the amount of \$0.01, for an indefinite period and due next on 2016-04-01.
	4885233		Two	
	4830451		ц	
	4826464	USAePay	Silva	
	4820746		test	\$11.22 Every week on Monday, in the amount of \$11.22, with 5 remaining payments and due next on 2016-03- 21.
	4818661		ZipVerifierTest	\$1.22 Every year in Jan and Nov and Mar and May and Jul and Sep on the eighteenth day and the twenty first day, in the amount of \$1.22, with 36 remaining payments and due next on 2016-03-21.

As shown in the image above, the table is now arranged in descending order. Click on 'Customer ID' in the top bar again to arrange customers in ascending order.

Customize Your Table

By default, the table displays the Customer ID, Company, Last Name, and Billing Schedule fields. To add or remove customer fields from the table follow these steps:

Step 1: Click * Options	located at the top right hand side of the page, then click 'Customize Table' on th	ne
drop down menu.		

		HEN C	ONSOLE DEMO ME			Search	QED
Dashboard		2	Customer [Database			
Transactions	æ					Q 🗂 Select Date + Add Customer 🕹 Import 🌐	Grid Edit 🚺 🌣 Option
E Batches	۲		Customer ID	Company	Last Name	Billing Schedules	III Customize Table 1
Customers	٥		4785472	Some Co.	Testing	\$6.00 Every month on the twenty first day, in the amount of \$6.00, with 8 remaining on 2016-03-21.	Indusive Search
Billing History Add Customer		Ξ	4808878		Silva		Exclusive Search
Products	æ		4811881		u		⊖Print
II Reports			4811956 4816504	Group Home OtherLLC	Kayla VISACust	\$6.00 Every week on Monday, in the amount of \$6.00, with 1 remaining payments and	due port en 2016 02
Fraud Manager	æ		4810504	OtherLLC	VISACUSI	21.	due next on 2010-03-
Settings			4816507	TheBest	MASTCust	\$25.00 Every third month on the twenty first day and the twenty eighth day, in the ar remaining payments and due next on 2016-03-21.	nount of \$25.00, with 1
	G		4816510	TheWorst	SCHEDULE	\$215.23 Every month on the eighteenth day and the third Sunday, in the amount of \$2 payments and due next on 2016-03-18.	215.23, with 0 remainin
			4816513	ThatCo	Ediscovercust	\$5.00 Every week on Monday and Tuesday, in the amount of \$5.00, with 50 remaining on 2016-03-21.	payments and due ne
			4818661		ZipVerifierTest	\$1.22 Every year in Jan and Nov and Mar and May and Jul and Sep on the eighteenth first day, in the amount of \$1.22, with 36 remaining payments and due next on 2016-0	
			4820746		test	\$11.22 Every week on Monday, in the amount of \$11.22, with 5 remaining payments a 21.	nd due next on 2016-0

Step 2: The 'Table Options' pop up window will appear showing current and available fields.

'Current Fields' are the fields currently showing in the table.	Table Options Current Fields
'Available Fields' are the fields available to add to the table.	疆 Customer ID III Company III Last Narmi III Billing Scheitales
To add more columns into the Customer Database table, drag and drop a field button into the 'Current Field's' section.	Available Fields
To remove a specific field, click the unwanted field button and drag it to the 'Available Fields' section.	III Default Method Routing

Step 3: Once you have finished adding or deleting specific fields, click 🗸 🔍 . If you want to reset your Customer Database table to default, click ວ Reset Default

Edit Your Customers Using Grid Edit

Grid Edit allows the merchant to edit all customers at once.

Note: You can only edit the fields currently displayed in the table. To add or remove columns to the table, see page 58.

Step 1: To edit	γοι	ır cus	tomers' i	nformati	on, click	I Grid Edit
	1	NEW C	ONSOLE DEMO ME	RCHANT		Search Q = 2 ?
🖬 Dashboard		20	Customer [Database		
Stransactions	Œ					Q 🛗 Select Date + Add Customer 🛓 Impor 🗐 Grid Edit 🕽 & Options
Batches	æ		Customer ID	Company	Last Name	Billing Schedules
Lustomers	0		4785472	Some Co.	Testing	\$6.00 Every month on the twenty first day, in the amount of \$6.00, with 8 remaining payments and due next on 2016-03-21.
Billing History Add Customer			4808878		Silva	
Aud Customen			4811881		Li	

Step 2: All information can now be edited. As shown in the image below, the merchant is able to edit the Customer ID, Company name, and Last name for each customer.

Note: Billing Schedules cannot be edited using Grid Edit. To edit Billing Schedules, see page 63 - 65.

Step 3: Once you are done editing all the information, click Save. You will be taken back to your Customer Database homepage.

-	Customer D	atabase		
- ~	Customer ID	Company	Last Name	Billing Schedules
	5028297	USAePay	Oganesyan	
	4885239	TNB	Three	Every week on Friday, in the amount of \$0.01, for an indefinite period and due next on 2016-04-01.
	4885233	WBA	Two	
	4830451	USAePay	u	
	4826464	USAePay	Silva	
	4820746	IMC	test	Every week on Monday, in the amount of \$11.22, with 5 remaining payments and due next on 2016-03-21.
	4818661	Unlimited	ZipVerifierTest	Every year in Jan and Nov and Mar and May and Jul and Sep on the eighteenth day and the twenty first day, in the amount of \$1.22, with 36 remaining payments and due next on 2016-03-21.
	4816513	ThatCo	Ediscovercust	Every week on Monday and Tuesday, in the amount of \$5.00, with 50 remaining payments and due next on 2016-03-21.
	4816510	The Limited	SCHEDULE	Every month on the eighteenth day and the third Sunday, in the amount of \$215.23, with 0 remaining payments and due next o 2016-03-18.
	4816507	TheBest	MASTCust	Every third month on the twenty first day and the twenty eighth day, in the amount of \$25.00, with 100 remaining payments and due next on 2016-03-21.
	4816504	OtherLLC	VISACust	Every week on Monday, in the amount of \$6.00, with 1 remaining payments and due next on 2016-03-21.

Add Customers

There are two methods to set up recurring billing (see image below):

- 1. Click + Add Customer located at the top right hand side of the Customer Database page.
- 2. Click 'Customers' on the side menu bar, then click 'Add Customer' from the drop down menu.

	1	NEW C	ONSOLE DEMO ME	RCHANT		Search Q 🗏 🔺
拉 Dashboard		2	Customer [Database		#1
Transactions	æ					Q 🗂 Select Date + Add Customer 🕹 Import 🖩 Grid Edit 🗢 Optio
Batches	æ		Customer ID	Company	Last Name	Billing Schedules
Customers	Θ		4785472	USAePay	Testing	\$6.00 Every month on the twenty first day, in the amount of \$6.00, with 8 remaining payments and due next on 2016-03-
Customer Database						21.
Billing History		E.	4808878	TNC	Silva	
Add Customer	2					
	-		4811881	WBY	Li	
Products	⊕		4830451	TwoCompany	ü	
III Reports		4	4030431	wocompany	Li	
Fraud Manager	æ		4885233	TheLimitedCo	Two	
K Settings	Ð		4816507	TheBest	MASTCust	\$25.00 Every third month on the twenty first day and the twenty eighth day, in the amount of \$25.00, with 100 remaining payments and due next on 2016-03-21.
	G		4816510	Unlimited	Schmidt	\$215.23 Every month on the eighteenth day and the third Sunday, in the amount of \$215.23, with 0 remaining payments and due next on 2016-03-18.

Note: Both methods will take you to the same screen, ask for the same information, and give you the same result.

Use these steps to add a recurring billing customer using method #1:

Step 1: Enter General Information: Click + Add Customer located at the top right hand side of your Customer Database page. A pop up window will appear.

Sene	ral Payment Methods Billing Schedules Custom Fields Note	es
1	5034265	
۵	Kim	🛔 Castano
	Address	
۵	Address 2	
9	City State	♀ Zīp
9	Country	🚔 Company
c	Phone	😝 Fax
۲	Email	% Web Site

Enter the customer's general information on the blank fields. The Customer ID and the customer's First Name and Last Name are the required fields. All the other fields are optional.

Once you have entered the customer's information, click

Step 2: Add A Payment Method: To add a payment method, click the 'Payment Methods' tab, then click + Add New .

ieneral	Payment Methods	Billing Schedules	Custom Fields	Notes		
				Add New		
				F Add New		

Select the payment method to set up for recurring billing. The 'Payment Method' pop up window will display three options depending on what you are set up to accept: **Credit**, **Check**, or **Gift Cards**. <u>Note</u>: The credit payment method option is available for all merchants. To accept checks and gift cards for recurring billing, please call your merchant service provider.

Credit	Check	Giftcard	
-	5		1
Payment Name			
Default			
TEN Flouting #			
Account #			
Type:			
Checking			:
Format			
- Default -			
E Drivers License			
License State			

To select a payment method, click the payment's method corresponding tab icon:

<u>Credit</u>: Click the **t** tab to set up a customer's credit card for recurring billing.

Enter the customer's card number and the credit card's expiration date. All the other fields are optional.

Note: Check the 'Default' box, to save the customer's credit card information as their default recurring billing payment method.

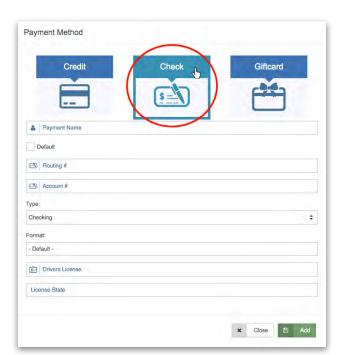
	Credit	Check	Giftcard
		5=	
4	Payment Name		
1	Default		
	Card Number		
m	Expiration Date		
	Dilling Object		
9	Billing Street		

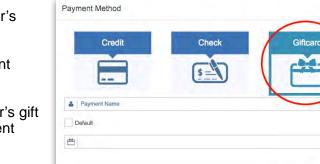


Check: Click the tab to set to set up a customer's checking account for recurring billing.

Enter the customer's Routing number and Account number. All the other fields are optional.

Note: Check the 'Default' box, to save the customer's account information as their default recurring billing payment method.





<u>Gift Cards</u>: Click the tab to set up a customer's gift card for recurring billing.

Enter the customer's gift card number. The 'Payment Name' field is optional.

Note: Check the 'Default' box, to save the customer's gift card number as their default recurring billing payment method.

Once you have selected the payment method and entered the necessary information, click 🕒 Add

You will be taken back to the 'Payment Methods' tab. Click ^{Apply} to apply the payment method to your customer's recurring billing setting then continue to Step 3.

L K GustNum: 45	lim Castano							
General	Payment Methods	Billing Schedules	Custom Fields	Notes				
	VISA XXXX	K 1111						
	Default	_						
				+ Add New				
					•	× Close	 Apply 	🖹 🖹 Save

Note: The 'Customer Database' can store more than one payment method for each customer, but only one can be classified as the 'Default Payment'.

× Close

Step 3: Add A Billing Schedule: To add a billing schedule, click on the 'Billing Schedules' tab then click

General Payment Method	s Billing Schedules	Custom Fields	Notes				
							(+
Next Payment	Amount	(Tax	Order ID	-	User	

The Billing Schedule pop up window will appear. Enter the payment amount on the 'Each Pmt Amt' field on the 'General' tab. The order ID and Tax are optional fields:

Order ID:	User:			Source Type:	
	(Auto)		+	Recurring	•
Each Pmt Amt		Tax			
44.99		0			
a ranking					
Enabled					

After entering the payment amount, click on the 'Schedule' tab:

		Date	Payments Remaining	Total Amount	Matched Rules
menuency:		Showing	1 ta U of Q entries.		
Select Schedule	+				H C > H
Number Of Payments:					
Every:					
1					

Enter the following information to set the billing schedule (refer to the image shown above):

• Starting Date: Click methods the icon, and choose the starting date for the recurring payments.

Note: This is not necessarily the first dat the customer will be billed. The first day of billing is the first date that obeys the billing schedule 'Rules' on or after the 'Starting Date'.

- *Frequency*: The merchant console gives you 3 frequency options for recurring billing payments: *Weekly, Monthly* and *Yearly*. Click the drop down arrows to select the recurring billing frequency.
- <u>Number of Payments</u>: Enter the total number of payments the customer should be charged. <u>Note</u>: The number entered corresponds with the selected 'Frequency'. For example, to bill a customer once a month for one year, select 'Monthly' in the 'Frequency' field and enter '12' into the 'Number of Payments' field.
- <u>Every</u>: Based on the previous example, enter the number of times you are billing your customer per month. If you want to charge the customer once per month enter "1" or twice per month, enter "2", and so on.
- <u>Rules</u>: Refer to the image shown below. Once you have entered the *Frequency*, *Number of Payments*, and *Every* for the billing schedule, you will be given the option to enter the rules. Based on the example, the merchant selected 'Second' and 'Monday' or the customer's recurring billing schedule. This means that the customer will be charged every second Monday of the month. Click Add Rule to apply the recurring billing schedule.

Note: The table, on the right hand side of the Billing Schedule pop up window, shows your future recurring billing charges. This table will automatically update when you click Add Rule .

Every n	onth c	n the s	econd	Monda	у.			1	And a second second	The second second	and the second second
Starting								Date	Payments Remaining	Total Amount	Matched Rules
盦 2	016-04	-04						04/28/2016	11	44.99	second Monday
Frequer	icy:							05/25/2016	10	89.98	second Monday
Monthly	/						+	00/20/2010	10	00.00	socond monday
Number	Of Pa	ments:						06/30/2016	9	134.97	second Monday
12								07/27/2016	8	179.96	second Monday
Every:								08/08/2016	7	224.95	second Monday
1							month(s)	09/29/2016	6	269.94	second Monday
On the:	2	3	4	5	6	7	Second ÷	10/26/2016	5	314.93	second Monday
8	9	10	11	12	13	14					
15	16	17	18	19	20	21	Monday ÷	12/01/2016	4	359.92	second Monday
22	23	24	25	26	27	28	Add Rule	01/26/2017	3	404.91	second Monday
Rules								03/02/2017	2	449.90	second Monday
On the	e secor	d Mono	lay.				Remove	04/27/2017	1	494.89	second Monday
								05/08/2017	end	539.88	second Monday
								Showing 1 to	12 of 12 entries		
											N 4 1 5 0
								Showing † lo	12 of 12 entries		N 3 1 5

Click 🗈 Add once you have set the customer's recurring billing payments.

You will be taken back to the 'Billing Schedules' tab. Click customer's recurring billing setting then proceed to Step 4.

Apply to apply the billing schedule to your

eneral Payment Methods	Billing Schedules	Custom Field	s Notes			
					+	Add Ne
lext Payment	Amount	Tax	Order ID	User		
14/28/2016	\$44.99	\$0.00		(Auto)	Every month on the second Monday.	

Step 4: Custom Fields: These fields can be customized to include additional information you would like to have in the customer's profile. As shown in the image below, the merchant can add the customer's birthdate, anniversary, age, maiden name, or other information in their billing profile. In order to add custom fields in a customer's billing profile, it must enabled in your Settings (See page 134 - Custom Fields).

General Payment Methods Billing Schedules	Custom Fields Notes	
Birthdate		
Anniversary		
Age		
Maiden Name		
置 Delele	× Close	An

Click 🗸

Apply when you are done entering information in your custom fields then proceed to Step 5.

Step 5: Notes: Click on the 'Notes' tab and enter any information you would like to take note of. When complete, click Apply then click Save. You will then be taken back to your Customer Database page.

General	Payment Methods	Billing Schedules	Custom Fields	Notes		
	- aymont moulous	Dining Collectures	Ouston (1) (Blus	110100		

View A Customer's Recurring Billing Profile

Step 1: From Customer Database page, click on the customer's name to view their recurring billing profile.

		NEW C	ONSOLE DEMO ME	ERCHANT			Search Q = 🔺
A Dashboard		2	Customer	Database			
Stransactions	œ						Q
Batches	æ		Customer ID	- Company	First Name	Last Name	Billing Schedules
Lustomers	Θ		5034265	USAePay	Kim	Castano	\$44.99 Every month on the second Monday, in the amount of \$44.99, with 12 remaining payments and due next on 2016-04-28.
Customer Database							and due next on 2016-04-26.
Billing History		E	5028297	USAePay	Ishkan	Oganesyan	
Add Customer	æ		4885239	US LLC	Test	Three	\$0.01 Every week on Friday, in the amount of \$0.01, for an indefinite period and due next on 2016-04 01.
Reports			4885233	TheLimitedCo	Test	Two	
Fraud Manager	æ		4830451	TwoCompany	Gera TEST	u	
X Settings	æ		4826464	USAePay	Jenny	Silva	
	G		4820746	USAePay	Brandon	test	\$11.22 Every week on Monday, in the amount of \$11.22, with 5 remaining payments and due next on 2016-03-21.

Step 2: The customer's profile pop up window will appear, where you can view or edit their *General* information, *Payment Methods*, *Billing Schedules*, *Custom Fields*, and *Notes*. See image below.

ener	al Payment Methods Billing Schedules Custom Fields	Notes
1	5034265	
4	Kim	Lastano
0	Address	
0	Address 2	
0	City State	9 Zip
0	Country	💼 USAePay
4	Phone	😝 Fax.
	Email	9 ₀ Web Site

Search by Name

Step 1: Refer to the image below. You can search for a customer or a customer's billing schedule by clicking the <u>c</u>icon.

. (Customer	Database			Q
•	Customer ID	- Company	First Name	Last Name	Billing Schedules
1	5034265	USAePay	Kim	Castano	\$44.99 Every month on the second Monday, in the amount of \$44.99, with 12 remaining payments and due next on 2016-04-28.
1	5028297	USAePay	Ishkan	Oganesyan	
1	4885239	USLLC	Test	Three	\$0.01 Every week on Friday, in the amount of \$0.01, for an indefinite period and due next on 2016-04 01.
	4885233	TheLimitedCo	Test	Two	

Step 2: To search for a specific customer, enter the customer's name, last name or company name.

earch					→
•	Customer ID	Company	First Name	Last Name	Billing Schedules
1	5034265	USAePay	Kim	Castano	\$44.99 Every month on the second Monday, in the amount of \$44.99, with 12 remaining payments and due next on 2016-04-28.
	5028297	USAePay	Ishkan	Oganesyan	
	4885239	US LLC	Test	Three	\$0.01 Every week on Friday, in the amount of \$0.01, for an indefinite period and due next on 2016-04 01.
	4885233	TheLimitedCo	Test	Two	
	4830451	TwoCompany	Gera TEST	LI	
1	4826464	USAePay	Jenny	Silva	

Search by Billing Schedule

Step 1: To search a customer by the date of their billing schedule, click Select Date

					٩	🗂 Se	lect D	ate) +	Add C	Custon	ner	🕹 Import 🖽 Grid Edit 🗳 Option
1¢	Customer ID	Company	First Name	Last Name	Billing Schedule	<		A	pril 20	16		>	
1	5034265	USAePay	Kim	Castano	\$44.00 Euger m	Su	Mo	Tu	We	Th	Fr	Sa	of \$44.00, with 42 semalaing neumanta
	0004200	USMEPay	NIII	Gastello	\$44.99 Every m and due next or	27	28	29	30	31	1	2	of \$44.99, with 12 remaining payments
1	5028297	USAePay	Ishkan	Oganesyan		3	4	5	6	7	8	9	
					and the second second	10	11	12	13	14	15	16	and the second sec
1	4885239	US LLC	Test	Three	\$0.01 Every we 01.	17	18	19	20	21	22	23	ndefinite period and due next on 2016-0
1	4885233	TheLimitedCo	Test	Two		24	25	26	27	28	29	30	1.1
	4000200	merimitedoo	leat	TWO		4	2	3	4	5	6	7	

Step 2: Select the date of the billing schedule you wish to view. The table will automatically show every customer with the selected recurring billing date.

Inclusive Search vs Exclusive Search

<u>Inclusive Search</u>: This type of search is an "and" search, meaning that the system will be searching in all fields associated with the word or value you have entered.

	3	NEW C	ONSOLE DEMO MI	ERCHANT			Search	QEA
🔬 Dashboard		20	Customer	Database				
Transactions	œ						Q 🗂 Select Date 🕇 Add Customer 🛓 Import 🖽	Grid Edil 🔅 Options
Batches	œ		Customer ID	- Company	First Name	Last Name	Billing Schedules	I Customize Table
🖳 Customers	Θ		5034265	USAePay	Kim	Castano	\$44.99 Every month on the second Monday, in the amount of \$44.99, with 12	Inclusive Search
Customer Database				and the			and due next on 2016-04-28.	Exclusive Search
Billing History			5028297	USAePay	Ishkan	Oganesyan		
Add Customer		-	1005000			-		La Export
Products	æ		4885239	US LLC	Test	Three	\$0.01 Every week on Friday, in the amount of \$0.01, for an indefinite period a 01.	⊖ Print
III Reports			4885233	TheLimitedCo	Test	Two		

Exclusive Search: This type of search is an "or" search. This type of search is more specific and case sensitive. The system will search for the exact word or value, you have entered.

		NEW C	ONSOLE DEMO ME	RCHANT			Search	QEE
M Dashboard		2	Customer I	Database				
Stransactions	œ						Q 🗂 Select Date + Add Customer 📥 Import 🔳 C	arid Edit 🗘 🗘 Option:
Batches	æ		Customer ID	- Company	First Name	Last Name	Billing Schedules	E Customize Table
Rustomers	Θ		5034265	USAePay	Kim	Castano	\$44.99 Every month on the second Monday, in the amount of \$44.99, with 12	Indusive Search
Customer Database							and due next on 2016-04-28.	Exclusive Search
Billing History			5028297	USAePay	Ishkan	Oganesyan		
Add Customer							Contractory of the second s	≛ Export
Products	œ		4885239	US LLC	Test	Three	\$0.01 Every week on Friday, in the amount of \$0.01, for an indefinite period a 01.	⊖Print
III Reports			4885233	TheLimitedCo	Test	Two		

Export Your Customer Database Data

Step 1: To export your customer data, click 'Export' from the drop down menu.

Options on the top right hand side of your page then select

	1	NEW C	ONSOLE DEMO M	ERCHANT			Search	QE
🔬 Dashboard		20	Customer	Database				
Transactions	Ð					Q, 🛗 Sele	ct Date 🕂 Add Customer 🛓 Import 🖽 (Grid Edit 🔅 Optio
Batches	æ		Customer ID	- Company	First Name	Last Name	Billing Schedules	I Customize Table
Customers	Θ		5034265	USAePay	Kim	Castano	\$44.99 Every month on the second Monday, in t	Inclusive Search
Customer Database							12 remaining payments and due next on 2016-0-	Exclusive Search
Billing History			5028297	USAePay	Ishkan	Oganesyan		-
Add Customer					1.00	-		La Export
Products	œ		4885239	US LLC	Test	Three	\$0.01 Every week on Friday, in the amount of \$0. period and due next on 2016-04-01.	⊖Print
III Reports			4885233	TheLimitedCo	Test	Two		
Fraud Manager	Ð		4830451	TwoCompany	Gera TEST	u		
K Settings	Ð	EI.	4826464	USAePay	Jenny	Silva		

Step 2: The Customer Database lets you export your data into CSV, TSV and JSON files. It is recommended, however, to export your data into a CSV file. Select the file format you want to export on the pop up window.

Under 'Select Files', check the box for the information you wish to include in the exported document: *Customers, Payment Methods,* or *Billing Schedules.* Check the *Combined* box to include all information.

Step 3: Click Export. The file will automatically download on your web browser.

Export Customer Data		
Select Format		
Select Files	Billing Schedules	
		Cancel Export

Import New Customers

Step 1: Choose File: Click ^{Import} located at the top right hand side of your Customer Database page.

		NEW C	ONSOLE DEMO ME	RCHANT			Search Q 🗏 🛎 1
🔬 Dashboard		20	Customer	Database			
➡ Transactions	Œ						Q 🗂 Select Date + Add Customer 🛃 Import 🖽 Grid Edit 🗢 Options
Batches			Customer ID	- Company	First Name	Last Name	Billing Schedules
Lustomers	•		5034265	USAePay	Kim	Castano	\$44.99 Every month on the second Monday, in the amount of \$44.99, with 12 remaining payments and due next on 2016-04-28.
Customer Database Billing History			5028297	USAePay	Ishkan	Oganesyan	
Add Customer	Ē		4885239	US LLC	Test	Three	\$0.01 Every week on Friday, in the amount of \$0.01, for an indefinite period and due next on 2016-04 01.
III Reports			4885233	TheLimitedCo	Test	Two	
Fraud Manager	œ		4830451	TwoCompany	Gera TEST	Li	

Drag and drop the file to import into the 'Drag & Drop Files Here' field.

As shown in the image below, you can also import a file containing specific information such as your customers' *General Information*, *Payment methods*, or *Billing Schedules*.

Note: It is recommended that you use comma separated text format for importing. You can save time by saving previously used import filters.

Click Next> to upload the file.

1.Choose File	2. Column Mapping	3.Verify	4.Upload Prac	essing
The first step in importing your seperated text format for impo below.				
Combined File (CSV, 7	rsv)			
		₽		
	Drag & I	Drop File	s Here	
		(or click)		
		OR		
Customer (CSV/ TSV)	Payme		e (CSV, TSV Billing	Schedule File (cs
Customer (CSK/15V)	Payme		e (CSV, TSV Billing	Schedule File (cs
Customer (CSV 159) Drag & Drop Fil Here				Schedule File (cs ag & Drop Files Here
Customer (CSH) TSM Drag & Drop Fil Here (or click)		nt Method Fil		rag & Drop Files

Step 2: Column Mapping: Match the fields to their corresponding field type or field name then click Next.

1.Choose File	2.Column Mapping	3.Verify	4.Upload Processing	
The following is a previe	ew of what will be imported. I	Please confirm the informa	tion and click Start upload b	utton to import yo
Customer Numbér 🧭	Customer ID 🕑	Company 🖙	First Name 🛛 🕞	Last Name
Customer Number	Customer ID	Company	First Name	Last Name
130575	NA	NA	test	simple 2
130576	NA	Noble Energy Inc	Glendora	Pourkaviani

Step 3: Verify: Verify the information and select the correct upload setting from the following options (See image below):

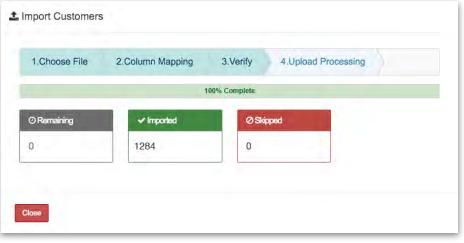
- Important All Records As New (Check this box to import ALL information as new including any duplicate information).
- Import New Records (Check this box to import all NEW customers).
- Update Existing Records (Check this box to update existing customers and import new customers).
- Delete ALL Records Before Import (Check this box to delete ALL records and replace it with new information. <u>Note</u>: *This cannot be reversed*).

Click when the upload information is verified then proceed to the next step.

1.Choose File	2.Colum	in Mapping	3.Verify	4.Upload Pi	rocessing	
Information	n	Fi	le Type: Combine	d File CSV File S	ize: 222.9k Tot	al Import: 1284
Import all records	s as new 💽 Imp	port new records	Update	e existing records	import Note: This	L records before will delete all ment methods and dules.
Gustomer Number	Customer ID	Company	First Name	Last Name	Address	Address 2
130575	NA	NA	test	simple 2	NA	NA
130576	NA	Noble Energy Inc	Glendora	Pourkaviani	666 No Entry Lane	NA
130577	NA	Noble Energy Inc	Glendora	Pourkaviani	666 No Entry Lane	NA

Step 4: Upload Processing: This window shows the status of your upload, confirming the number of remaining uploads, successfully imported data, and skipped data.

Click Close when you are done. You will then be taken back to your Customer Database.



Options

then select 'Print' from the drop down

Print Customer Database Data

Step 1: To print your Customer Database data, click menu.

New Console Demo Merchant QEA? Search 🖬 Dashboard Customer Database STransactions Q 🗂 Select Date + Add Customer .≛ Import Option: I Customize Table Batches Company Last Name Billing Schedules Customer ID Les Customers Inclusive Search 4785472 \$6.00 Every month on the twenty first day, in the amount of \$6.00, with 8 remaining pa Some Co. Testing on 2016-03-21. Exclusive Search Customer Database **Billing History** 4808878 Silva LExport Add Customer 4811881 Li ⊖ Print Products 4811956 Group Home Kayla dil Reports 4816504 OtherLLC VISACust \$6.00 Every week on Monday, in the amount of \$6.00, with 1 remaining payments and due next on 2016-03-Fraud Manager 21. X Settings 4816507 TheBest MASTCust \$25.00 Every third month on the twenty first day and the twenty eighth day, in the amount of \$25.00, with 100 remaining payments and due next on 2016-03-21. G 4816510 TheWorst SCHEDULE \$215.23 Every month on the eighteenth day and the third Sunday, in the amount of \$215.23, with 0 remaining

Step 2: A PDF print window will pop up on your web browser. Click Print to print your PDF copy.

Customer	Manager × @Customer Manager ×	<u> </u>	4
> C 🔒 https:/	//sandbox.usaepay.com/_console/customers#cust	comer-print/page/1	₽☆:
Customer ID Company 1234574 USAePay 1234573 The Best 1234572 Company 1234571 ABC Com	Cancel	912014 Commun Marger Clastormer II. Company Last Name Billing Schedules 1234574 USA47ay Cation 1234575 The Best Company Purchase 1234572 Company A Buylt 1234572 LAGC Company One 1234570 USA47ay Buylt 1234570 USA47ay Doe	
1234570 USAePay 1234569 USAePay 1234568 USAePay 1234567 USAePay	DestinationColor_10_11_41_9	1234568 USAePay Castano 1234567 USAePay Doe	
	Pages (a) All		
	Copies 1 + -		
	Layout Portrait 👻		
	Options Simplify page		
	+ More settings		
	Print using system dialog (N&P) Open PDF in Preview		
		https://www.inversion.com/ed/coverners/content	10

Billing History

All processed recurring billing payments are recorded in your Billing History page. To access your Billing History, click 'Customers' on the side menu bar then select 'Billing History' on the drop down menu.

		NEW CONSOLE DEM	IO MERCHANT					Search	QEA
넓 Dashboard		D Billing His	tory						
Transactions	Œ					Q All	✓ Approved	Ø Deci	ined X Errored & Option
Batches	Œ	Date 👻	Customer Num	Transaction ID	Company	Name	Amount	Result	Reason
Customers	Θ	04/05/16 09:50 am	5033773	105874951			\$3514.56	A	Approved
Customer Database Billing History		04/05/16 09:50 am	5033866	105874939			\$5.64	A	Approved
Add Customer		04/05/16 09:34 am	5033788	105874546			\$0.01	A	Approved
Products	Ð	04/05/16 09:13 am	5033776	105873922			\$0.13	A	Approved
III Reports		04/05/16 09:06 am	5033869	105873694			\$0.01	A	Approved
Fraud Manager Settings	± ا	04/05/16 08:13 am	5033353	105871606			\$10.00	A	Approved
	G	04/04/16 04:04 pm	5032015	105823369			\$22.20	A	Approved
		04/04/16 11:24 am	5031376	105814759			\$105.00	А	
		04/03/16 09:08 am	5028318	105757575			\$1.00	A	Approved

This page will show the following information:

- Date the transaction was processed
- Customer Number
- Transaction ID
- Company Name
- Amount of the transaction
- Result of the transaction: Approved (A), Declined (D), or Errored (E)
- Reason of the decline or error status

Filter transaction results by clicking the All, Approved, O Declined, or Errored buttons located at the top right hand side of the page.

For example, clicking on <a>Approved displays all your approved recurring billing transactions. See image below.

			O MERCHANT						Search Q 🗏 🔒
🔬 Dashboard		ා Billing His	tory						
Transactions	Ð							Q AII	Approved Ø Declined X Errored Ø Option
Batches	Ð	Date -	Customer Num	Transaction ID	Company	Name	Amount	Result	Reason
Lustomers	Θ	04/06/16 08:39 am	5036134	105921732	USAePay		\$0.10	A	Approved
Customer Database		04/06/16 08:37 am	5036130	105921714	USAePay		\$10.00	A	Approved
Billing History		04/00/10 00:07 am	0000100	105521714	USAeray		ψ10.00		Approved
Add Customer		04/06/16 08:10 am	5036128	105921046	USAePay	Ishkan Test	\$350.00	A	Approved
Products	Ð	04/06/16 07:33 am	5036292	105920376			\$1.11	A	Approved
III Reports		04/05/16 09:50 am	5033773	105874951			\$3514.56		
Fraud Manager	Ð	04/05/16 09:50 am	5033773	105874951			\$3514.56	A	Approved
🗙 Settings	Ð	04/05/16 09:50 am	5033866	105874939			\$5.64	A	Approved

Search For A Transaction In Billing History

Step 1: To search for a specific transaction, click the cicon located at the top right hand side of the page.

			MO MERCHANT							Search	Q	4 7
🔬 Dashboard		ා Billing His	tory									
Transactions	⊕							a, Ali	 Approved 	Ø Declined	× Errored	Option:
Batches	æ	Date 🗸	Customer Num	Transaction ID	Company	Name	Amount	Result	Reason	V		
Customers	8	04/06/16 08:39 am	5036134	105921732	USAePay		\$0.10	A	Approved	_		
Customer Database Billing History		04/06/16 08:37 am	5036130	105921714	USAePay		\$10.00	A	Approved			
Add Customer		04/06/16 08:10 am	5036128	105921046	USAePay	Ishkan Test	\$350.00	A	Approved			
Products	æ	04/06/16 07:33 am	5036292	105920376			\$1.11	A	Approved			
III Reports		04/05/16 09:50 am	5033773	105874951			\$3514.56	A	Approved			
Fraud Manager	Ð											
🗙 Settings	æ	04/05/16 09:50 am	5033866	105874939			\$5.64	A	Approved			

Step 2: When searching for a specific transaction, enter the customer's information such as the Customer's Number, Transaction ID, Company Name, or the Amount of the transaction.

Billing History					
Search	+ Ali	✓ Approved	Ø Declined	× Errored	Options

Your Billing History page will automatically update. For example, if you entered the customer's name 'John' on the search field. All the transactions with 'John' will be shown on your Billing History table.

Export Billing History Data

then select 'Export' from the drop down menu.

Step 1: To export your Billing History data, click Options (located on the top right hand side of your page)

					Q All	Approved	O Declined	× Errored 🔅 Option
Date	*	Customer Num	Transaction ID	Company	Name	Amount	Result	I Customize Table
04/06/16 08:39 am		5036134	105921732	USAePay		\$0.10	A	Inclusive Search
04/06/16 08:37 am		5036130	105921714	USAePay		\$10.00	A	Exclusive Search
04/06/16 08:10 am		5036128	105921046	USAePay	Ishkan Test	\$350.00	A	L'Export
04/06/16 07:33 am		5036292	105920376			\$1.11	А	Approveo
04/05/16 09:50 am		5033773	105874951			\$3514.56	А	Approved
04/05/16 09:50 am		5033866	105874939			\$5.64	А	Approved

Step 2: Select the format of the file you want your data to export as (CSV or TSV), then click Export

Your file will automatically download on your browser.

Export Billing History Data		
Select Format Comma-separated values (CSV)	Tab-separated values (TSV)	
		Cancel Export

Print Billing History Data

Step 1: To print your Billing History Data, click Options then select 'Print' from the drop down menu.

		NEW CONSOLE DEMO	MERCHANT				S	earch	QEA
ː Dashboard		3 Billing Histo	ory						
Transactions	Œ					Q AI	✓ Approved	Ø Declined	× Errored Optio
Batches	Œ	Date	Customer Num	Transaction ID	Company	Name	Amount	Result	I Customize Table
	8	04/06/16 08:39 am	5036134	105921732	USAePay		\$0.10	A	Inclusive Search
Customer Database Billing History		04/06/16 08:37 am	5036130	105921714	USAePay		\$10.00	A	Exclusive Search
Add Customer		04/06/16 08:10 am	5036128	105921046	USAePay	Ishkan Test	\$350.00	А	1 Export
Products	œ.	04/06/16 07:33 am	5036292	105920376			\$1.11	A	Approved
III Reports		04/05/16 09:50 am	5033773	105874951			\$3514.56	A	Approved
Fraud Manager	Œ	04/05/40 00:50	5000000	105874939			05.04		
X Settings	æ	04/05/16 09:50 am	5033866	105674939			\$5.64	A	Approved
	G	04/05/16 09:34 am	5033788	105874546			\$0.01	А	Approved

Step 2: A PDF print window will pop up on your web browser. Click **Print** to print your PDF copy.

C 🔒 ht	ttps://www-0	4.usaepay.com/_console/customers#b	illing-history-print/			\$
/16 03:08 pm /16 04:33 pm /16 04:03 pm /16 03:42 pm	Print Total: 1 sheet	t of paper Cancel Print	Str3bile Date Customer Nu 05/15/15 03.08 pm2313123 05/05/16 04.03 pm45723978 05/05/16 04.03 pm45572397 05/05/15 03.42 pm45572250 05/05/15 03.42 pm45572250	Commer Manager Im Transaction IDCompany Name AmountResultRessol 1141027828 test companykevin delgado538.00 A Approv 113080638 54.00 A 113080639 54.00 A 113080639 54.00 A 113080639 54.00 A 113080133 1120701318 51.23 A		
/16 01:56 pm	Destination Pages Copies Layout	Change Change All Contrait				
	Options + More se	Simplify page Two-sided				
	Print using sy Open PDF in	vstem dialog (∿\$8P) Preview	https://www.chi.aus.prg.com/_counded-aussianser	while shary grint	и	

Product Database

The merchant console allows you to add, edit, track, and manage all of your products through a single, easily customizable database.

		NEW C	ONSOLE DEMO MERC	HANT			Search	Q = 4
🖬 Dashboard		T P	roduct Data	base	Q I Grid Edit		+ Add Products	2 Import Products Option
	œ	-						
Batches	œ	- *	Product Id	Name	Price	Wholesale Price	List Price	Qty On Hand 🛦
Customers	Œ		123462	Bracelet	852.00	0.00	0.00	23
Products	Θ		123482	Brooch	0.50	0.00	0.00	25
Products Database			321	Chanel Bag	852.00	12000.00	1000.00	26
Add Product			321	Chanel Bag	852.00	12000.00	1000.00	23
III Reports			123464	Earrings	852.00	0.00	0.00	26
Fraud Manager	œ		123456	Galaxy	599.00	0.00	0.00	44
X Settings	œ		123468	Hoodie	10.00	0.00	0.00	80
	0			ipad	550.00	0.00	0.00	-3 🛕
				iPen	99.99	85.00	0.00	5
			ABC1234	iPhone	599.00	499.00	0.00	43
			123456	iPhone 7S	500.00	0.00	0.00	0

Rearrange Your Table

By default, your Product Database table is arranged in alphabetical order. The table can be sorted or rearranged by any of the listed fields, by clicking the title of the field in the header line. Click field in the header line again to rearrange the list from ascending to descending order and vice versa. The image below shows an example of a merchant sorting the table by highest price to lowest price.

		NEW C	ONSOLE DEMO MERO	CHANT			Search	QEL
M Dashboard		TP P	roduct Data	base	Q, III Grid Edit	≡ Categories ♀ Warehouses	+ Add Products	2 Import Products Option
Stransactions	æ							
Batches	æ		Product Id	Name	Price	Wholesale Price	List Price	Qty On Hand 🛦
Lustomers	Ð		321	Chanel Bag	852.00	12000.00	1000.00	26
Products	Θ		321	Chanel Bag	852.00	12000.00	1000.00	23
Products Database			123464	Earrings	852.00	0.00	0.00	26
Add Product			123462	Bracelet	852.00	0.00	0.00	23
III Reports			ABC1234	iPhone	599.00	499.00	0.00	43
Fraud Manager	æ		123456	Galaxy	599.00	0.00	0.00	44
X Settings	æ			ipad	550.00	0.00	0.00	-3 🛦
	G		123458	Razor	550.00	0.00	0.00	0 🔺
			123456	iPhone 7S	500.00	0.00	0.00	0
			123480	iPhone 7S	500.00	0.00	0.00	25
			123456	Jordan 11's gamma blue.	200.00	0.00	0.00	0
			123476	Sweater	200.00	0.00	0.00	26

Customize Your Table

By default, the Products Database table displays the following columns: *Product ID*, *Name*, *Price*, *Wholesale Price*, *List Price*, and the *Qty on Hand*. This table can be customized by adding and deleting specific fields.

Step 1: Click Coptions located at the top right hand side of the page, then select 'Customize Table' from the drop down menu.

	_	NEW C	ONSOLE DEMO MERC	HANT			Search		QE
🔬 Dashboard		T P	roduct Data	base	Q 🖽 Grid Edit		ises + Add Products	1 Import P	roducts 🗘 🗘 Option
Transactions	œ	_							E Customize Table
Batches	œ	- ~	Product Id	Name	Price	Wholesale Price	List Price	Qty	La Export
Customers	æ		123462	Bracelet	852.00	0.00	0.00	23	Hide Disabled
Products	Θ		123482	Brooch	0,50	0.00	0.00	25	🖶 Print
Products Database			321	Chanel Bag	852.00	12000.00	1000.00	26	
Add Product			321	Chanel Bag	852.00	12000.00	1000.00	23	
III Reports			123464	Earrings	852.00	0.00	0.00	26	
Fraud Manager	æ		123456	Galaxy	599.00	0.00	0.00	44	
X Settings	œ		123468	Hoodie	10.00	0.00	0.00	80	
	G			ipad	550.00	0.00	0.00	-3 🗛	

Step 2: The Table Options pop up window will appear showing your 'Current Fields' and 'Available Fields'. To add more columns into your Product Database table, drag and drop a field button into the 'Current Fields' section. To remove a specific a field, click the field button you want to remove and drag it onto the 'Available Fields' section.

Current Fields								
III Product Id	III Name	Price	III Wholesale Price	ce 🔡 List	Price III Qt	y On Hand		
Available Fields		ine Cummi Fial	Ids sector					
Ref. Product I	d 🔳 sku		Category	Model	🔳 Weight	I Ship Weight	📕 Manufacturer	Physical Good
🔛 Qty On Order	III Enabl	ed 🚺 Ta	xable 📔 Low S	tock Alert	III Image URL	E Create Date	Modified Date	
						c	Reset Default	× Cancel

To reset your Product Database Table to default, click C Reset Default

Edit Your Products Using Grid Edit

Much like the Customer Database, Grid Edit allows you edit all product information at once.

Note: You can only change information based on the displayed column fields. To add more field columns to your Product Database table, see page 76.

Step 1: To edit your products using Grid Edit, click Grid Edit

		NEW C	CONSOLE DEMO MERC	CHANT		Search	h)	QEA
Dashboard		T P	Product Data	base	Q (III Grid Edit)	E Categories 9 Warehous	es + Add Products	1 Import Products Option
Transactions	æ						- (
E Batches	Ð		Product Id	Name	Price	Wholesale Price	List Price	Qty On Hand 🛦
Customers	Ð		123462	Bracelet	852.00	0.00	0.00	23
Products	Θ		123482	Brooch	0.50	0.00	0.00	25
Products Database			321	Chanel Bag	852.00	12000.00	1000.00	26
Add Product			321	Chanel Bag	852.00	12000.00	1000.00	23
III Reports			123464	Earrings	852.00	0.00	0.00	25
Fraud Manager	•		123456	Galaxy	599.00	0.00	0.00	44
X Settings	Ð		123468	Hoodie	10.00	0.00	0.00	80
	0			ipad	550.00	0.00	0.00	-6 🛦

Step 2: Each column field then becomes editable. As shown in the image below, the merchant is able to edit the Product ID, Name, Price, Wholesale Price, and List Price. To edit Qty on Hand, see pages 83 - 86.

		Fo	orm in bulk edit mode behaves like an	excel excel spreadsheet 🕹		✓ Save	a X Cancel
		Product Databas	e	Q BG	rid Edit 📔 🗮 Categories 📔 🕈 M	Varehouses + Add Products	2 Import Products Option:
		Product Id	Name	Price	Wholesale Price	List Price	Qty On Hand A
		123462	Bracelet	852.00	0.00	0.00	23
	~	123482	Brooch	0.50	0.00	0.00	25
1		321	Chanel Bag	852.00	12000.00	1000.00	26
	~	321	Chanel Bag	852.00	12000.00	1000.00	23
	~	123464	Earrings	852.00	0.00	0.00	25
	~	123456	Galaxy	599.00	0.00	0.00	44
	~	123468	Hoodie	10.00	0.00	0.00	80

Step 3: Once you are done editing the fields, click

		F	orm in bulk edit mode behaves like an e	xcel excel spreadsheet 🕁		✓ Save	× Cancel
í	P P	roduct Databas	e	Q, (11)	Grid Edit	rehouses + Add Products	La Import Products Option
	•	Product Id	Name	Price	Wholesale Price	List Price	Qty On Hand 🛕
		123462	Bracelet	852.00	0.00	0.00	23
		123482	Brooch	0.50	0.00	0.00	25
1		321	Chanel Bag	852.00	12000.00	1000.00	26

Add A New Product

You can add a new products using one of the following two methods:

- 1. Click + Add Products located at the top right hand side of the Product Database page.
- 2. Click 'Products' from the side menu bar, then click 'Add Product' from the drop down.

Note: Both methods will take you to the same screen, ask for the same information, and give you the same result. You can also add a new product from the New Order Form, see page 3.

		NEW C	ONSOLE DEMO MERO	CHANT		Se	arch	#1 Q 🛛 🖸
M Dashboard		T P	roduct Data	base	Q 🗐 Grid Edit	≡ Categories		1 Import Products Optio
Transactions							\sim	
Batches	æ	- *	Product Id	Name	Price	Wholesale Price	List Price	Qty On Hand 🛦
🖳 Customers	œ		123462	Bracelet	852.00	0.00	0.00	23
Products	Θ		123482	Brooch	0.50	0.00	0.00	25
Products Database			321	Chanel Bag	852.00	12000.00	1000.00	26
Add Product	2		321	Chanel Bag	852.00	12000.00	1000.00	23
III Reports			123464	Earrings	852.00	0.00	0.00	25
Fraud Manager	æ		123456	Galaxy	599.00	0.00	0.00	44
X Settings	æ		123468	Hoodie	10.00	0.00	0.00	80
	G			ipad	550.00	0.00	0.00	-6 🛦

As an example, add a new product using method #1.

Step 1: Details: Click + Add Products located at the top right hand side of the page.

A pop up window will appear, as show in the image below. Enter the following information:

k info Picane nave yo	our product to ook inventories and image	m)			
otalis					
Product Name:	A Name		Weight:		
Manufacturer:	et Manufacturer		Ship Weight:		
roduct Model:	Product Model		Price:	\$	Taxable
roduct ID:	图)		Wholesale Price:	\$	
KU:			List Price:	5	
PC:			Date Available:	Select Date	
I Generale			Product Type:	Physical	
ategory:	- Setect One -	÷ě	Enabled:	Virtual	

- Product Name
- Product's Manufacturer
- Product Model Number
- Product ID: This is a user assigned product identification number.
- SKU: This is the product's Stock Keeping Unit number.

• **UPC:** This is the product's Universal Product Code. You can assign the product's UPC and generate a barcode. Enter up to 15 digits for the UPC number. Click to generate the barcode. Refer to image below.

i Info Please save y	rour product to add inventories and images			
Details				
Product Name:	Gold Leather iPhone 6 Plus Case	Weight:		
Manufacturer:	Apple	Ship Weight:		
Product Model:	123456	Price:	\$	Taxable
Product ID:	887953	Wholesale Price:	\$	
SKU:	12315849	List Price:	\$	
UPC:	018889759766587	Date Available:	Belect Date	
Il Generate		Product Type:	Physical	
	018889759766587	Enabled:	Virtual	
Category:	- Select One -			

- Category: Select a category from the drop down or add a new product category. To add a new
 product category, select 'Add New Category' at the bottom of the drop down menu. For further
 instructions to add a new product category, see page 86.
- Weight: This is the product's total weight.
- Ship Weight: This is the product's weight adjusted for packing and shipping purposes.
- Product **Price:** Click the 'Taxable' box to add tax to the product.
- Product's Wholesale Price
- List Price: The manufacturer's suggested retail price or MSRP.
- **Date Available:** The date the item will be available. Select the date when the product is available to sell. Leave this blank if you want the product to be available immediately.
- *Product Type:* Choose if the product is Physical (eg. a Hard cover book) or Virtual (eg. an eBook).

Note: Check the 'Enabled box', to make the product available to sell immediately.

Click Apply to save the entered information. New tabs (Inventories, Price Tiers, Description, and Images) will appear once you click Apply.

Step 2: Inventories: Click on the 'Inventories' tab. The inventories tab allows you to enter the quantity of each product as necessary. You may also assign each item a minimum quantity and break down the total inventory by warehouse to better track your stock.

To assign quantities to individual warehouses, choose a warehouse from the drop down menu, then enter the quantity of the product on hand and the quantity of the product on order. You may add as many warehouses as necessary.

Details	Inventories	Price Tiers	Description	Images	s		
Low	Stock Alert:		t				
Tota	I quantity on h	and;	0				
Tota	I quantity on c	order:	0				
Warel	house				Qty on Hand	Qty on Order	
	ect New)						
	Warehouse 2					1	
test	warehouse 3			-			
test	warehouse 4 ing						

Click < Apply to save the entered information and go to the next step.

Step 3: Price Tiers: Click on the 'Price Tiers' tab. The 'Price Tiers' tab allows you to put a specific product on discount or promotion.

To add a price tier, click + Add Price Tier

etails	Inventories	Price Tiers	Description	Images				
Qty					Price			
				0	+ Add Price T	er		
				N.				

The Qty and Price field will appear. As an example, a merchant placed the Gold Leather iPhone 6 Plus Case on promotion: Enter the value "3" for the Qty and enter "35.00" for the price. This means that if a customer buys 3 cases, the customer gets each case for \$35.00.

ails	Inventories	Price Tiers	Description	Images			
ty					Price		
3				and up	\$ 35	0	
				+	Add Price Tier		

Multiple price tiers can be added and deleted for each product.

Click (2) on the side of each price tier to delete a price tier.

Click + Add Price Tier to add another price tier.

Click Apply to save the information you entered then proceed to the next step.

Step 4: Description: Click on the 'Description' tab. This tab allows you to enter a description or additional information about the product. Once you have entered the description, click

ails Inventories Price Tiers Desc	ription Images		
Enter description here			

Step 5: Images: Click the 'Images' tab. The Images tab allows you do upload an image for the product. To upload an image, drag and drop the image on the 'Drag Image Here' box or click on 'Upload Files' as shown in the image below.

	ce Tiers	Description	Images						
efault Product Image	0							Photo	Galle
		Drop image I	nere or click	check mark b	utton to set de	fault image.			
Upload Files									

Note: The valid file formats are .jpg, .jpeg, .gif, .png; Maximum file size: 5 MB

Click Apply to save all the information you entered and click Save to return to the Products Database page.

Import New Products

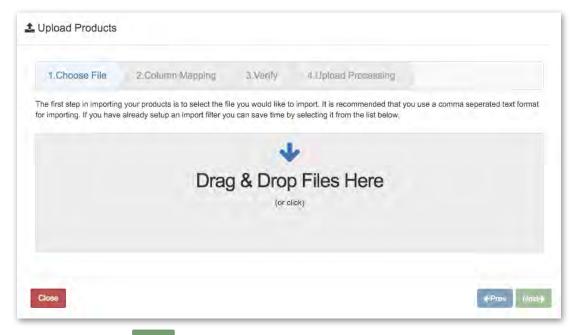
The Product Database allows you to import multiple products by uploading a CSV file.

Step 1: Click Import Products located at the top right hand side of your screen.

		NEW C	ONSOLE DEMO MER	CHANT			Search	QE
ː Dashboard		T P	roduct Data	abase 🔍 💷 d	Grid Edit 📃 Cate	gories 🛛 🛛 Warehouses	+ Add Products	1 Import Products
Transactions	æ	-						
Batches	Œ	- *	Product Id	Name	Price	Wholesale Price	List Price	Qty On Hand A
🖳 Customers	œ		887953	Gold Leather iPhone 6 Plus Case	45.00	25.00	35.00	15
Products	Θ		123462	Bracelet	852.00	0.00	0.00	23
Products Database	k		123482	Brooch	0.50	0.00	0.00	25
Add Product			321	Chanel Bag	852.00	12000.00	1000.00	26
III Reports			321	Chanel Bag	852.00	12000.00	1000.00	23
Fraud Manager	Œ		123464	Earrings	852.00	0.00	0.00	25
🗙 Settings	œ		123456	Galaxy	599.00	0.00	0.00	44
	G		123468	Hoodie	10.00	0.00	0.00	80

Step 2: Choose File: Select the file you would like to import by using the 'Drag & Drop Files Here' option. You can also import your file by clicking on the 'Drag & Drop Files Here' box and selecting the file from your computer.

Note: It is recommended that you use a comma separated text format for importing.



After selecting the file, click Next->

Step 3: Column Mapping: After uploading the file, make sure all the fields match their corresponding field type or name.

1.Choose File	2.Column Maj	pping 3.Verify	4. Uplond Processi	ng		
The following is a pre-	view of what will be impo	rted. Please confirm the in	formation and click Start uploa	ad button to import your f	file.	
Ref Product Id@	Product Id@	SKU@	Category Id2*	Category@	Name@	De
Ref Product Id	Product Id	SKU	Category Id	Category	Name	De
8728	1		31	Entr?e	Aqua Pana	
8729	2		31	Entr?e	Arancini con Sicilia	ano

Step 4: Verify: Verify the information. This step lets you update your current product database with your imported file. This step will allow you to do the following:

- Important all records as new (Checking this box will have all the information into imported file as new).
- Import new records (Checking this box will upload new products information).
- Update existing records (Checking this box will automatically update your existing and new records).
- Delete ALL records before import.

1.Choose File	le 2.Colur	nn Mapping	3.Verify	4.Upload F	rocessing	
Information	ion		File Type: Combin	ed File CSV File	Size: 222.9k Total Im	nport: 1284
	rds as new 🔽 Im	port new reco	rds 🛛 🗸 Updat	e existing records	Delete ALL re	cords before
Import all record	rds as new					
import all recon	ros as new 💽 Im	he die Process			import	
Import all recon	ros as new 💌 im				import Note: This will de existing payment billing schedules.	methods and
Import all record	Product Id	SKU	Category Id	Category	Note: This will de existing payment	methods and
		SKU	Category Id	Category Entr?e	Note: This will de existing payment billing schedules.	t methods and

Step 5: Upload Processing: This window shows you the status of your upload, confirming the number of remaining uploads, successfully imported data, and skipped data.

1.Choose File	2.Column Mapping	3.Verify	4.Upload Processing	
0 Remaining	✓ Imported	Ø Skip	red	
0	1284	0		

Click **Close** when you are done. You will be taken back to your Product Database page.

Search For A Product

Search the Product Database by the following methods:

- 1. Using the Open Search option
- 2. Search for a product by Category
- 3. Search for a product by Warehouse

Open Search:

Step 1: Click the located at the top right hand side of your page.

		T NEW C	CONSOLE DEMO MERCH.	ANT				Search Q = 4 ?
A Dashboard		T P	Product Datab	ase	Grid Edit	E Categories : Accessories	Varehouses + Ad	d Products 2 Import Products 4 Options
Transactions	œ							
Batches		- *	Product Id	Name	Price	Wholesale Price	List Price	Qty On Hand 🛕
🙁 Customers	œ		123462	Bracelet	852.00	0.00	0.00	23
Products	8		123482	Brooch	0.50	0.00	0.00	25
Products Database			321	Chanel Bag	852.00	12000.00	1000.00	26

Step 2: The Open Search bar will appear. Enter a specific word or information that is affiliated with the product you are searching for. As shown in the image below, the merchant is looking for a specific product name with the word "Gold". All product with the word "Gold" will then appear on your page.

		NEW CONSOLE DEMO MERCH	ANT			Search	Q = 4 ?
🔬 Dashboard		Gold				× + Add Products	Limport Products Options
Transactions	æ	\bigcirc					
Batches	œ	Product Id	Name	Price	Wholesale Price	List Price	Qty On Hand
Lustomers	æ	887953	Gold Leather iPhone 6 Plus Case	45.00	25.00	35.00	15
Products	8						
Products Database							

Search Product By Category:

Step 1: Click on **Example**, located at the top right hand side of your page.

A drop down menu will appear where you can view all your products by category. The drop down menu shows all your categories and the corresponding number products in that category. The image shown below shows that the merchant wants to search for a product from the 'Accessories' category.

		NEW C	ONSOLE DEMO MERCH	ANT				5	Search Q E S
🖬 Dashboard		T P	roduct Datab	ase	٩	III Grid Ec		ouses + Add Pro	oducts 🔔 Import Products 🗘 Option
Transactions	۲						+ Add Category	1	
Batches	Ð	•	Product Id	Name	Price	Wholesa	(show All)	lst Price	Qty On Hand 🛆
Eustomers	•		123462	Bracelet	852.00	0.00	Accessories).00	23
Products	Θ		123482	Brooch	0.50	0.00	 (12) Apparel (12)	1.00	25
Products Database			321	Chanel Bag	852.00	12000.0	🕐 hello 🕼	000.00	26
Add Product			321	Chanel Bag	852.00	12000.0	 Phones <i>C</i> test test test <i>C</i> 	1000.00	23
III Reports			123464	Earrings	852.00	0.00	•	0.00	25
S Fraud Manager	۲		123456	Galaxy	599.00	0.00		0.00	44
X Settings	æ		887953	Gold Leather iPhone 6 Plus Case	45.00	25.00		35.00	15
	G		123468	Hoodie	10.00	0.00		0.00	80
				ipad	550.00	0.00		0.00	-6 🛕
				iPen	99.99	85.00		0.00	5

Step 2: Click the Category you want to view. Your page will automatically show all the products in the 'Accessories' category.

Search Product By Warehouse:

Step 1: Searching for a product by Warehouse is similar to searching for a product by Category. Click Warehouses, located at the top right hand side of your page.

A drop down menu will appear where you can view all your products by warehouse. The drop down menu shows all your categories and the corresponding number products in from that Warehouse. The image shown below shows that the merchant wants to search for a product from 'Warehouse 1'.

		NEW CONSOLE DEMO MERCH	ANT			Sea	irch Q = 4
🖬 Dashboard		Product Datab	ase	٩	⊞ Grid Edit	s (9 Warehouses) + Add Produ	cts 🛓 Import Products 🗘 Optio
Transactions	۲					+ Add Warehouse	
Batches	æ	Product Id	Name	Price	Wholesale Price	(show All)	Qty On Hand 🛦
Customers	œ	123462	Bracelet	852.00	0.00	(11) Warehouse 1	23
Products	۲	123482	Brooch	0.50	0.00	Warehouse 2 W Warehouse 3 W	25
Products Database		321	Chanel Bag	852.00	12000.00	Warehouse 4 C	26
Add Product		321	Chanel Bag	852.00	12000.00	1 Warehouse 5	23
III Reports		123464	Earrings	852.00	0.00	0.00	25
Fraud Manager	۲	123456	Galaxy	599.00	0.00	0.00	44
K Settings	æ	887953	Gold Leather iPhone 6 Plus Case	45.00	25.00	35.00	15
	G	123468	Hoodie	10.00	0.00	0.00	80
			ipad	550.00	0.00	0.00	-6 🛦

Step 2: Click the Warehouse you wish to view. Your page will automatically show all the products from the selected warehouse.

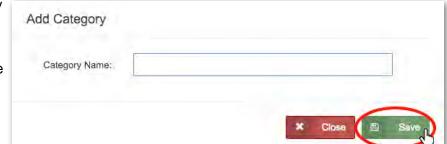
Add A New Category

Step 1: Click on **Categories** located at the top right hand side of the page.

Select '+ Add Category' from the drop down menu.

	1	NEW C	ONSOLE DEMO MER	CHANT			Search	QEE
최 Dashboard		T P	roduct Data	base	Q, El Grid Edit	≡ Categories) ♥ Warehouses	+ Add Products	1 Import Products Options
Transactions	(B)					+ Add Category		
Batches	`⊕'	- *	Product Id	Name	Price	(show All)	List Price	Qty On Hand 🛕
Rustomers	(123462	Bracelet	852.00	Accessories IP	0.00	23
Products	Θ		123482	Brooch	0.50	(12) Apparel C(13) asfvafv(14) C	0.00	25
Products Database			321	Chanel Bag	852.00	💿 hello 🗭	1000.00	26
Add Product			321	Chanel Bag	852.00	 6 Phones C 0 test test test 	1000.00	23
III Reports			123464	Earrings	852.00	0.00	0.00	25
Fraud Manager	æ		123456	Galaxy	599.00	0.00	0.00	44
X Settings	æ		887953	Gold Leather iPhone 6 Plus Case	45.00	25.00	35.00	15
	G		123468	Hoodie	10.00	0.00	0.00	80

Step 2: Enter the name of the category on the 'Category Name' field then click 🗸 Save



Your new category will automatically be added to your Category list.

Add A New Warehouse

Step 1: Click on **Warehouses**, located at the top right hand side of your page.

		NEW C	ONSOLE DEMO MERO	CHANT 2			Search	
1 Dashboard		T P	roduct Data	base	Q III Grid Edit	≡ Categories	Varehouses + Add Products	1 Import Products Option
Transactions	æ	_					+ Add Warehouse	
Batches	•	- *	Product Id	Name	Price	Wholesale I	(show All)	Qty On Hand 🛦
Customers	•		123462	Bracelet	852.00	0.00	1 Warehouse 1	23
Products	Ξ.		123482	Brooch	0.50	0.00	 Warehouse 2 Warehouse 3 	25
Products Database			321	Chanel Bag	852.00	12000.00	Warehouse 4 I	26
Add Product			321	Chanel Bag	852.00	12000.00	Warehouse 5 Image: State St	23
III Reports			123464	Earrings	852.00	0.00	0.00	25
Fraud Manager	•		123456	Galaxy	599.00	0.00	0.00	44
K Settings	æ		887953	Gold Leather iPhone 6 Plus Case	45.00	25.00	35.00	15
	G		123468	Hoodie	10.00	0.00	0.00	80

Step 2: Enter the name of the warehouse, the Warehouse ID, and the Description on the corresponding fields then click vave

Your new warehouse will automatically be added to your Warehouse list.

Name:	
Warehouse ID:	
Description:	
C Delete	🗙 Close 🖺 Save

Export Your Product Database Data

Step 1: To export your Product Database data, click Options located at the top right hand side of your page then click 'Export' from the drop down menu.

		NEW C	ONSOLE DEMO MERC	CHANT			Search		
Dashboard		TP P	roduct Data	base	Q, 🔠 Grid Edit		es + Add Products	2. Import i	Products 🗘 🗘 Optio
Transactions	Ð	í -			-				I Customize Table
Batches	Œ	•	Product Id	Name	Price	Wholesale Price	List Price	Qty	LExport
Lustomers			123462	Bracelet	852.00	0.00	0.00	23	Hide Disabled
Products	e		123482	Brooch	0.50	0.00	0.00	25	🖶 Print
Products Database			321	Chanel Bag	852.00	12000.00	1000.00	26	
Add Product			321	Chanel Bag	852.00	12000.00	1000.00	23	
III Reports			123464	Earrings	852.00	0.00	0.00	25	
Fraud Manager	Ð		123456	Galaxy	599.00	0.00	0.00	44	
X Settings	Œ		887953	Gold Leather iPhone 6 Plus Case	45.00	25.00	35.00	15	
	G		123468	Hoodie	10.00	0.00	0.00	80	
				ipad	550.00	0.00	0.00	-6 🛦	

Step 2: Select the file format you want your data to export as (a CSV, Tab Delimited, or JSON file).

You can select to export all fields by clicking the 'Export All Fields' off and on switch icon.



Your file will automatically download on your web browser.

4	Export Product Database	
rt	Select Format CSV Tab Delimited JSON	
	Export all fields	
		Cancel Export

Print Your Product Database Data

Step 1: To print your Product database data, click

* Options then select 'Print' from the drop down menu.

		NEW C	ONSOLE DEMO MERC	HANT			Search		QEE
M Dashboard		T P	roduct Data	base	Q, I Grid Edit		es + Add Products	🛓 Import P	roducts Optio
Transactions	Œ	-	_					1	E Customize Tabl
Batches	œ	- *	Product Id	Name	Price	Wholesale Price	List Price	Qty	🕹 Export
Customers	Œ		123462	Bracelet	852.00	0.00	0.00	23	Hide Disabled
Products	Θ		123482	Brooch	0.50	0.00	0.00	25	🖶 Print
Products Database			321	Chanel Bag	852.00	12000.00	1000.00	26	
Add Product			321	Chanel Bag	852.00	12000.00	1000.00	23	

Step 2: Once you select 'Print', a PDF print window will pop up on your web browser. Click Print to print your PDF copy.

	Print		4/7/2016		Products Databa						
	Total: 1 sheet	of paper		Produc	cts Datab	base	(20.00	oducts in system)		(29 products	in system)
Product Id	iotal. I sheet	or paper	Product Id	Name	Price		List Price	Qty On Hand		Qty On Hand	
123,462		Cancel Print	123,462 123,482	Bracelet	852.00		0.00	23 25		23	
123,482		Gancer	321	Chanel Bag	852.00	12000.00	1000.00	26		25	
321				Chanel Bag Earrings	852.00	12000.00	1000.00	23 25		26	
321			123,456	Galaxy	599.00	0.00	0.00	44		23	
123,464	Destination	Color_10_11_41_9	887,953 123,468	Gold Leather iPhone 6 Plus Case Hoodie	45.00		35.00	15 80		25	
123,456				ipad iPen	550.00 99.99		0.00	-6 5		44	
887,953		Change		iPhone	599.00	499.00	0.00	43		15	
123,468				iPhone 75 iPhone 75	500.00		0.00	25		80	
and the second	Pages	 All 		Jacket	25.00	22.00	24.00	45		-6	
	rayes	(a) Ail		Jordan 11's gamma blue. Leggings	200.00	0.00	0.00	70		5	
122.400		Q e.g. 1-5, 8, 11-13		Necklace	99.99	0.00	0.00	5		43 25	
123,480 123,456		0 8.0. 1-5, 8, 11-13	123,458	Pants Bazor	10.00		8.00	71		25	
123,450			123,456	Shirt	5.00	3.00	4.00	129		45	
123,456		and the second se	123,470 123,476	Skirt Sweater	25.00 200.00	0.00	0.00	45 26		45	
123,456	Copies	1 + -	12,345	Tablet	150.00	0.00	0.00	-5		70	
123,460			123,472	Tank Top test new item	5.00 20.00	0.00	0.00	36		5	
123,400			11,223,344			0.00	0.00	50		71	
123,458	Layout	Portrait 👻	11,223,344	test test test	70.00	0.00	0.00			11	
123,456	1000	1.0000	123,474	Tube Top	5.00	0.00	0.00	24		129	
123,470				Key: Enabled	Disabled	ow Inventory				45	
123,476	Options	Simplify page		Rey. Chables	Distored	Low moundary				26	
12,345										-5	
123,472		Two-sided								36	
11,223,344	+ More set	ttings									
11,223,344										50	
123,474	Print using sys	stem dialog (\C#\$P)								24	
	Open PDF in I	Description									
	Open FDF III I	review									
			here the best second	and considering the fact that the second	the second fixed by	St Completions		antistableteler 10			
					A. S. S. S.				10 C		
					-		-				

REPORTS

The merchant console allows you to view a wide range of reports related to the transactions processed in your account.

From your Dashboard, you can access these reports by clicking 'Reports' on the side menu bar. This page displays all your pre-made reports types: *Pre-Made Credit Card*, *Pre-Made Check*, *Pre-Made Customer Report*, *Pre-Made Gift Card Reports*, *Pre-Made Point of Sale*, and *Pre-Made Other*.

		NEW CONSOLE DEMO MERCHANT	Search	Q = 4 ?
<u>ដ</u> í Dashboard	1.00	II Reports	N	ew Report Report Categories
Stransactions	Œ			
Batches	Œ	Search Reports	Q	
Lustomers	æ			
Products	œ			
Lill Reports		Pre-Made Credit Card		
Fraud Manager	•	Transaction Summary Credit Card	Transaction Summary by Card Type	-
X Settings		All transactions by Card type	Batches by Date	
	G	Sales by Cardtype	Sales by Users	
		Sales by Date	Errors by User	
		Errors by Cardtype	Errors by Date	
		Errors by Reason	Declines by Date	
		Declines by Cardtype	Declines by User	
		Declines by Reason		
		Pre-Made Check		
		Check Transaction Summary	All Transactions	
		Settled by Date	Settled by User	
		Returns by Date	Returns by User	
		Returns by Reason	Errors by Date	
		Errors by Reason	Errors by User	
		Declines by User	Declines by Reason	
		Declines by Date		

Choose from one of the pre-made reports to retrieve the data you need.

Pre-Made Credit Card

Pre-made credit card reports are broken down into three (3) categories Errors, Declines, and Sales. Each Category is broken down into four (4) sections: User, Reason, Card Type and Date.

- Transaction by Summary Credit Card
- Transaction by Summary Card Type
- All Transactions by Card Type
- Batches by Date
- Errors by User
- Errors by Reason
- Errors by Card Type
- Errors by Date

- Declines by User
- Declines by Reason
- Declines by Card Type
- Declines by Date
- Sales by User
- Sales by Card Type
- · Sales by Date

REPORTS

Note: Errors v. Declines

An **error** received during a transaction usually indicates that there was something wrong with the transaction itself, but not necessarily with the credit card or e-check. The most common errors are an invalid card number (not 13-16 digits long), or invalid amount (\$0.00).

A **decline** occurs when the credit card or e-check is declined by the processor. The most common reason for a Card Decline, is that the card is over its credit limit or is no longer in good standing. While transactions resulting in errors can be corrected and re-ran, most declines cannot be so easily remedied.

Pre-Made Check

The pre-made check reports provided are similar to the pre-made credit card reports. The following reports are provided:

- Check Transaction Summary
- · Declines by Date
- Settled by User
- Settled by Date
- Returns by User
- Returns by Reason Returns by Date
- Errors by DateDeclines by User
- Declines by Reason

All Transactions

Errors by UserErrors by Reason

Pre-Made Customer Reports

This pre-made report type includes a *Customers Transactions by Date* report to help you track your customer's recurring billing information and payments.

Pre-Made Gift Card Reports

The pre-made gift card reports are00 similar to credit card and check reports. Pre-made gift card reports are broken down into three (3) categories Errors, Declines, and Sales. Each Category is broken down into three (3) sections: User, Reason, and Date.

- Gift Card History (by Date)
- Errors by User
- Errors by Reason
- · Errors by Date
- Declines by User
- Declines by Reason
- Declines by Date
- Sales by Date
- Sales by User

Pre-Made Point of Sale

- · Sales by Product Category
- Line Item Details
- Cash Sales by User
- Cash Sales by Date

Pre-Made Other

- Products Approved Transactions
- Today's Transactions
- Customers Transactions
- Transactions by Date, Type, Status & Results

The Fraud Manager of the merchant console lets you view, edit, manage all your Fraud Modules and Credit Card Block list.

Fraud Modules

To access your Fraud Modules, click on 'Fraud Manager' on the side menu bar from your Dashboard then select 'Fraud Modules' from the drop down menu.

	New CONSOLE DEMO MERCHANT	Search Q = 2 ?
a Dashboard	Ø Fraud Modules	
Transactions	Universal Fraud Module	
Batches	·	
Lustomers	O Universal Fraud Module	
Products		
LIII Reports		
Fraud Manager	No Modules Found for Universal Fraud Module	
Fraud Modules Credit Card Block List		
🗙 Settings	ADD MODULE	
	 Universal Fraud Module VTerminal No Modules Found for vTerminal + ADD MODULE 	
	Email Support Privacy Policy License Report Bug	Powered By US DPAY

The Fraud Module Center, as shown in the image above, allows you view an change the settings of each transaction source key in order to control various security aspects and prevent credit card fraud from occurring in your account.

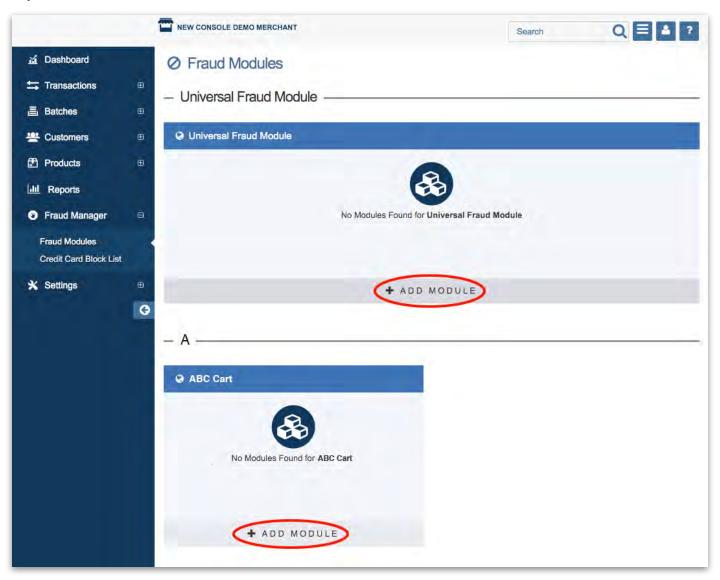
Note: A **transaction source key** is a 16 alphanumeric digit that allows merchants to integrate with shopping carts and 3rd party softwares. Such source keys are generated from your payments forms, API keys, or application keys.

For example: When you create a payment form, the source key of that payment form will automatically be in your Fraud Module Center. This allows you to add specific fraud modules into that payment form's source key to be able to process payments securely.

Adding A Fraud Module

In the Fraud Module Center, you can set Universal Fraud Modules or set each source key's fraud modules separately.

Step 1: To add a Fraud Module, click **+** ADD MODULE on the Universal Fraud Module table or in each source key table. See image below. **Note**: Setting a Universal Fraud Module affects all of your sources keys used to conduct transactions.



Step 2: A pop up window will appear where you can select modules to add and apply to your Fraud Modules. This pop up window will display a slider where you can view and navigate through all the fraud modules available.

Available Fraud Modules:

- AVS Response
- Bin Ranges
- Bin Type Blocker
- Card Level Results
- Card Type
- Card ID Checker
- Duplicate Detection
- Email Blocker
- Fraud Profiler

- Block By Host or IP
- Country Blocker
- Multiple Credit Cards
- Transaction Amount
- Zip Code Verifier

a				6
AVS Response	Bin Ranges	Bin Type Blocker	Card Level Results	
+ SELECT	+ SELECT	+ SELECT	+ SELECT	
AV	S Response			
that	module allows you to select which trar you will accept. All others will be declin lect	nsactions to accept based on the address red.	s verification system response. Check	the respons

Click on < or 🔊 to navigate and select through the Fraud Module slider menu.

Step 3: To select the fraud module you wish to add to a specific source key, you can do one of the following:

- **1.** Člick **+ SELECT** on the bottom of the fraud module type tab.
- 2. Click **Select** located under the description of the fraud module.
- 3. Click the tab then click \rightarrow Next located at the lower right hand side of the pop up window.

/S Response				6
AVS Respo #1	nse Bin Ranges	Bin Type Blocker	Card Level Results	
+ SELE	T + SELECT	+ SELECT	+ SELECT	
~	AVS Response			
	This module allows you to select response. Check the responses			system
	Select			

AVS Response

From the fraud module slider menu, select 'AVS Response'. The AVS Response module allows you to select which transactions to accept based on the address verification system response.

A pop up window will appear giving a list of all the possible AVS responses. The first four AVS codes or responses (YYY, YYX, NYW, and NYZ) are enabled by default.

AVS Code	Allow	Description
YYY	(ON	Address: Match & 5 Digit Zip: Match
YYX	(ON)	Address: Match & 9 Digit Zip: Match
NYZ	(ON	Address: No Match & 5 Digit Zip: Match
NYW	(MQ	Address: No Match & 9 Digit Zip: Match
YNA	OFF .	Address: Match & 5 Digit Zip: No Match
NNN	OFE .	Address: No Match & 5 Digit Zip: No Match
xxw	OFF	Card Number Not On File
xxu	OFF .	Address Information not verified for domestic transaction
XXR	OFF .	Retry / System Unavailable
xxs	OFE .	Service Not Supported
XXE	OFF	Address Verification Not Allowed For Card Type
XXG	OFF	Global Non-AVS participant
YYG	OFF	International Address: Match & Postal: Not Compatible
GGG	OFE 🜒	International Address: Match & Postal: Match
YGG	OFE	International Address: No Compatible & Postal: Match
NNC	OFF .	International Address: Address not verified
NA	OFF .	No AVS response (Typically no AVS data sent or swiped transaction)
	OFF .	Precheck AVS Response Before Authorization* *This feature might not be supported by your merchant account type.

To enable an AVS response, switch the button to \bigcirc

To disable an AVS response, switch it back to OFF .

Note: All disabled AVS response will be erred by the system.

Click Save to apply the fraud module setting to the source key.

Bin Ranges

From the fraud module slider menu, select 'Bin Ranges'. The Bin Ranges module allows you to block transactions based on the credit card number's Bin. The **BIN** or **Bank Identification Number** is used to identify the bank that issued the credit card. This can be determined by looking at the first 6 digits of the credit card number. By blocking specific BINs, you can block cards from certain countries or card types (such as gift or reward cards).

Enter the BIN Range Number on the field, as shown in the image below. Enter each bin range on its own line.

ource, Universal Fraud Mödüle	
nter Range Number(s) Below	
ttär each bin range on its own line.	
	🗴 Cancel 🗲 Previous 当 Sa

Click when you have entered the Bin Range number(s) to apply the fraud module setting to the source key.

Bin Type Blocker

From the fraud module slider menu, select 'Bin Type Blocker'. The BIN is the first few digits of a credit card which identifies that type of the card. The BIN Type Blocker module lets the system review the type of the card or block the card based on whether the card is a credit or debit card. This review is done before the card is authorized for the charge amount.

You may choose to the option of selecting which card types to accept OR which card types (credit or debit) to decline. Only one of these options may be selected. By default, the 'Accept All Cards Except For' option is enabled. To switch to the 'Decline All Cards Except For' by clicking off to turn that option on.

Accept All Cards Except For:			ON)					
Decline All Cards Except For:			OFF					
Visa		MasterCard			Amex		Discover	
Credit	OFF	Credit		OFF	Credit	DFF	Debit	OFF O
Debit	OFF 8	Debit		QFF 8				
Unknown	OFF	Unknown		(DFF				
Decline Message:								

As you can see from the image above, your different card types for VISA, MasterCard, Amex, and Discover to accept or decline. You may also enter a decline message on the 'Decline Message' field for when a disabled card type is used.

When complete, click Save . This will apply the fraud module setting to the source key.

Card Level Results

From the fraud module slider menu, select 'Card Level Results'. The Card Level Results module allows you to select which card level result to accept.

To enable card level response, switch the button to • for that specific card level response. All responses that are • will be declined. See image below.

Code	Allow	Description	
	(DN)	Visa Traditional	
3	(Visa Traditional Rewards	
3		Visa Signature	
5	(Visa Signature Preferred	
		Proprietary ATM	
	(ON)	Visa Classic	
3	(ON)	Visa Business	
4	(ON)	Visa Consumer Check Card	
	(ON)	Visa Infinite	
í.	(ON)	Reserved	
<	(ON)	Visa Corporate	
	(ON)	Electron	
vi	(ON)	MasterCard/EuroCard	
N	(ON)	Visa Platinum	
o	(ON)	Reserved	
2	(ON)	Private Label	
2	(ON)	Proprietary	
S	(ON)	Visa Purchasing	
г	(ON)	Reserved/Interlink	
u.	(ON)	Visa TravelMoney	
v	(ON)	V Pay	
G1	(DN)	Visa Signature Business	
G2	(ON)	Visa Business Check Card	
G3	(ON)	Visa Business Enhanced	
J1	(8 ON)	Visa General Prepaid	
J2	(ON)	Visa Prepaid Gift Card	
J3	(0 ON)	Visa Healthcare	
J4	(. ON)	Visa Prepaid Commercial	
K1	(0 ON)	Visa GSA Corporate T&E	
Q1	(ON)	Private Label Prepaid	
S1	(ON)	Visa Purchasing with Fleet	
S2	(ON	Visa GSA Purchasing	
S3	ON)	Visa GSA Purchasing with Fleet	
S 4	(ON)	Goverment Services Loan	
\$5	(ON	Commercial Transport EBT	
S6	(_ ON)	Business Loan	
\$7	(NO)	Visa Distribution	
AX	(ON)	American Express	
DN	(ON	Diners	
DI	(ON	Discover	
JC:	(ON	JCB	
NA	OFF .	No Card Level Result Returned/Available	

After selecting the response(s) you want to accept or decline, click Save. This will apply the fraud module setting to the source key.

Card Type

From the fraud module slider menu, select 'Card Type'. The Card Type module only accepts the credit card types listed. Transactions that are not listed or enabled will be blocked.

Note: This does not affect whether your merchant account has support for a specific card type. If you allow a transaction in this fraud module but you do not have support for it, the transaction will still be declined by the processor. Please check with your reseller for more information on which card types you may accept.

As shown in the image below, you have a list of all the possible card types you can accept. Anything you are enabling, the card type must be switched ••••. Anything that you are disabling, the card type must be switched ••••.

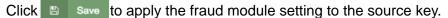
Card Type	Allow
American Express	
Visa	(ON)
Master Card	(ON)
Discover	(ON)
JCB	OFF O
enRoute	OFF .
Diners Club	OFF .

Click Save to apply the fraud module setting to the source key.

Card ID Checker

From the fraud module slider menu, select 'Card ID Checker'. The Card ID Checker module allows you to select which transactions to accept based on the result of the card ID verification (CVV2, CID, etc).

Code Allow Description	
M ON Match	
N OFF No Match	
P ON Not Proces	sed
S OFF Should be	on card but not so indicated
U Issuer Not	Dertified
X No respons	e from association
na No CVV2/C	VC data available for transaction



Duplicate Detection

From the fraud module slider menu, select 'Duplicate ID Detection'. This module detects and blocks duplicate transactions. This is useful for shopping carts that do not catch when a user has (accidentally) double clicked on the "order" button. The system uses the last 4 digits of the card number, the transaction amount and the invoice number to determine if a duplicate transaction has been submitted.

ouroa, Universal Fraud Module							
Time Period:	00	(minutes)					
Ignore Invoice #	OFF						
Enable Support Trace	OFP						
			 Cancel	_	Previous	_	Bave

You must specify the length of time (in minutes) the system will check back for a duplicate transaction. You have the option to ignore the invoice number. If the invoice does not match, it will still catch it as a duplicate. By enabling 'Enable Support Trace', the system will be able to track the transaction from the back end.

Once you have entered the duplicate detection time period, click Save . This will apply the fraud module setting to the source key.

Email Blocker

From the fraud module slider menu, select 'Email Blocker'. The Email Blocker module blocks transactions coming from free webmail servers such as Hotmail and Yahoo! It can also be configured to allow or block specific email addresses or domains. You may add a single email address or multiple email addresses to be blocked or allowed. Enter the email address on the corresponding fields.

Email Blocker					
ocked Emails					
ter each email address on its own line. block from all yahoo domains you cou			om yahoo.cor	m you would enter	"*@yanoo.con
					-
owed Emails	 				
er each email or domain on its own lir			from yahoo.co	om you would ente	er "*@yahoo.ci
er each email or domain on its own lir allow from all yahoo domains you cou			from yahoo.co	om you would ente	ar "*@yahoo.ci
er each email or domain on its own lir allow from all yahoo domains you cou			from yahoo.ci	om you would ente	ar **@yahoo.co
er each email or domain on its own lir allow from all yahoo domains you cou			from yahoo.ci	om you would ente	ar **@yahoo.o
owed Emails er each email or domain on its own lir allow from all yahoo domains you cou			from yahoo.cr	om you would entr	ar ™@yahoo ¢i

Once you have entered the emails, click Save. This will apply the fraud module setting to the source key.

Fraud Profiler

From the fraud module slider menu, select 'Fraud Profiler'. The Fraud Profiler module performs a real time fraud risk assessment of transactions. If the resulting score is over a set threshold, the transaction is blocked. The risk assessment is a combination of automated and human traffic pattern analysis. Any sudden charges in the number of transactions, the dollar amounts, the countries of the customers or decline rate received by a merchant are flagged and used to build a blacklist of customers by IP address.

You have the ability to pick the percentage of the threshold you wish to set.	Sounce: Universal Fraud Module
You can choose the option to skip the module for sources secured by pin and to enter a decline message. Click Save to apply the fraud module setting to the source key.	Threshold: 0% OFF Skip module for sources secured by pin Decline Message: X Cancel Y Previous Save

Block by Host or IP

From the fraud module slider menu, select 'Block by Host or IP'. The Block by Host or IP module will block transactions based on a single IP address (192.0.0.1), a range of IPs (192.0.0.0-192.0.0.255), a host address (hacker.fraud.com) or an entire tld (*.jp), domain (*.fraud.jp) or subdomain (*.more.fraud.jp).

To use this module, your shopping cart software must pass the client IP correctly. To check if your cart is passing the client IP, view the details on a transaction. If an IP is listed next to "Client IP" then you will be able to use this module.

Enter each IP or host to block on its own line. To block an entire network, you may enter just the class-c or class-b. For example, to block "192.168.1.0" you would enter "192.168.1.*". To block the domain "domain.com", you would enter "domain.com".

Block By Host or IP	
"192.168.1.0" you would enter "192.168.1.*". To bloc	ck an entire network you may enter just the class-c or class-b. For example, to block ck the domain "domain.com" you would enter ""domain.com". Please note that as this lookup will add significant time to each transaction.

Note: Blocking on host or domain is strongly discouraged, as this lookup will add significant time to each transaction.

Once you have entered the host or IP Address, click Save . This will apply the fraud module setting to the source key.

Country Blocker

From the fraud module slider menu, select 'Country Blocker'. The Country Blocker module blocks or allows transactions based on what country they originate in. The location of the customer is based on their IP address, which is checked against the system's GeoIP database. To use this module, your shopping cart must pass the IP address to the gateway. You have a few options in terms of checking the IP Address, you can detect your:

- Client IP automatically: IP detected automatically (select if not certain which setting to choose).
- Local Client IP: Customers connecting directly to the gateway such as a payment form.
- Remote Client IP: Customers connecting to a third party software such as a shopping cart.

If the country is unknown you have the option to deny it by check the "Deny if country is unknown" box.

You also have the option to select which countries to accept or deny.

Click Save to apply the fraud module setting to the source key.

Block by:		
OFF Client IP (Auto)		
IP detected automatically, use if not sure		
OFF Local Client IP		
Customer connecting directly to gateway, ie		
payment form		
ON Remote Client IP		
Customer connecting to third party server, ie		
shopping cart		
Deny if country is unknown		
DENY All Except		
Canada		
United States		
United States United States Minor Outlying Islands		
United States Minor Outlying Islands		
United States Minor Outlying Islands Afghanistan		
United States Minor Outlying Islands Afghanistan Albania		
United States Minor Outlying Islands Afghanistan		
United States Minor Outlying Islands Afghanistan Albania Algeria		
United States Minor Outlying Islands Afghanistan Albania Algeria American Samoa		

Credit Card Blocker

From the fraud module slider menu, select 'Credit Card Blocker'. The Credit Card Blocker module checks the credit card number against a list of bad cards or use the system provided list.

rce: Universal Fraud Module		
Use System List All Except		
rror Message:		
Merchant does not accept this card, try a different card.		
Q View/Edit Block List		
Q View/Edit Block List		
Q View/Edit Block List		

If you wish to add to your credit card block list, click View/Edit Block List Card Block List page (See page # for further instructions).

To use the system provided list, the 'Use System List All Except' switch must be enabled or • • • . You may also add an error message on the 'Error Message' field. Click save to apply the fraud module setting to the source key. Multiple Credit Cards

Merchant Console User Guide

From the fraud module slider menu, select 'Multiple Credit Cards'. The 'Multiple Credit Cards' module blocks transactions where more than a specified number of different card numbers are attempted on the same order number or from the same IP address. This module is useful for blocking people from using your merchant account with stolen credit card numbers.

Time Period:	00	(minutes)
Number of Cards:	0	
Number of Declines:	0	(per card)
Block by:	OFF	Invoice #
	OFF	Order ID
		Client IP (Auto) automatically, use if not sure
		Local Client IP crimecting directly to galaway, lie payment form
	_	Remote Client IP
		crimecting to third party server, is shopping and

Enter the 'Time Period', 'Number of Cards', and the 'Number of Declines per card'. You may also choose the option of blocking the transaction by Invoice Number, Order ID, Client IP, Local Client IP, or Remote Client IP. Refer to the image above.

Click Save to apply the fraud module setting to the source key.

Transaction Amount

From the fraud module slider menu, select 'Transaction Amount'. The 'Transaction Amount' module allows the merchant to define allowable transaction amounts. Any transactions that are not within the defined amounts are blocked.

To specify a minimum but no maximum, enter a * in the maximum field. To specify a maximum but no minimum, enter a * in the minimum field.

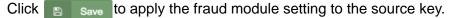
\$ 0				
\$ 0				

After the minimum and maximum amount have been entered, click Save to apply the fraud module setting to the source key. Zip Code Verifier

From the fraud module slider menu, select 'Zip Code Verifier'. The 'Zip Code Verifier' module verifies that the billing and/ or shipping zip code matches the state, city, and/or area code entered. This will block any garbage data and force customers to enter accurate address information.

To verify against the billing and shipping zip code State, City or Area code switch the button to even with zip code that is not in your database (ex. A non-US postal code).

Verify Billing Zipcode Against	Verify Shipping Zipcode Against	
OFF State	OFF State	
OFF City	OFF City	
OFF Area Code	OFF Code	
OFF CCCEpt transactions w	h zipcode not in database (ie non-us postal codes)	
OFF Accept transactions w	n zipcode not in database (le non-us postal codes)	



Credit Card Block List

The Credit Card Block List section of the merchant console allows you to block credits cards that have been processed in your account. This allows the Fraud Manager to block or stop a credit card from any unusual activities.

To access your Credit Card Block List, click on 'Fraud Manager' on the side menu bar from your Dashboard then select 'Credit Card Block List' from the drop down menu.

		New New	w Console Demo Merchant		Search Q 0
1 Dashboard					
Transactions	Ð	Blocker	Credit Card Block I	list	
Batches	Ð				+ Add Card 📩 Import From File
Customers	æ		Date Added	Card Number	Note
P Products	æ		2016-05-12	411111xxxxxx1111	VISA1
III Reports			2016-05-12	510510xxxxxx5100	MASTERCARD2
Fraud Manager	Θ		2016-05-12	555555xxxxx4444	MASTERCARD1
Fraud Modules Credit Card Block List	5		2016-05-12	356600xxxxxx0505	JCB2
K Settings			2016-05-12	353011xxxxxx0000	JCB1
	G		2016-05-12	601100xxxxx9424	DISCOVER2
			2016-05-12	601111xxxxxx1117	DISCOVER1
			2016-05-12	371449xxxxx8431	AMEX2
			2016-05-12	378282xxxxx0005	AMEX1

Add A Card

A 44 0---

Step 1: Click on + Add Card located at the top right hand side of the Credit Card Block List Table. A pop up window will appear.

Step 2: Manually enter the credit card number on the 'Card Number' field. If desired, enter a note in the 'Optional Note' field.

Card Number		
Optional Note		
Copy to all merchants		

Step 3: Check the 'Copy to all merchants' box to apply this to all of your merchant console account users then click save.

The merchant console allows you to set up, customize, and monitor your settings in the following pages:

- General Settings
- Users
- Receipts
- Payment Forms
- API Keys
- Application Keys
- Custom Fields

General Settings

You can establish and edit the basic settings for your account in your General Settings. The General Settings page is divided into five sections:

- System Settings
- Receipt Settings
- Customer Database and Recurring Billing
- Product Database
- Batch Settings

To access your General Settings, click 'Settings' from your side menu bar then click 'General' on the drop down menu.

	Now Console Demo Merchant	Search Q = 4 ?
మౖ Dashboard ≒ Transactions జ	General Settings	
≣ Batches ⊡	Ø System Settings	Receipt Settings
💾 Customers 🗉	Merchant Email	S Email From
Products 😐	Rows Returned per Page	🖌 Email To
Lul Reports ● Fraud Manager	5100 rows 100 rows 5 0 5 100 rows 5	•
X Settings		
General	😤 Customer Database and Recurring Billing	Product Database
Users Receipts	D 0 C \$ 0.05	im Lat
Payment Forms API Keys Applications	△ 11:00 PM 0	
Custom Fields	E, Batch Settings	and the second
G	Specific Time Specific Time	Satch Error Email
	At Select time Ø	
	+ Add another time Expire Auths After 0 days	30 days 30
	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	1 1 1 1 1 1 1 1 1 1 1 1 1 20 24 28

System Settings

The System Settings has two basic features: a default **Merchant Email** and the **Rows Returned Per Page**.

The email entered in the 'Merchant Email' field will be the email where a receipt is sent automatically after every transaction. **Note:** To add multiple emails in the 'Merchant Email' field, separate each email with a comma.

The Rows Returned Per Page sets the number of rows that will appear by default in every table available in the merchant console. Choose the numbers of rows from the slider or enter a specific value on the number field.

Merchan	it Email		
ows Return	ed per Page		
0 rows	31 rows	100 rows	T

Receipt Settings

The Receipt Settings allows you to configure the header of a customer's email receipt.

- Email From field: Enter the email address you would like to appear in the 'Email From' section of the customer's emailed receipt. Entering an email address in this field will prevent the customer from receiving an emailed receipt from an unfamiliar email address. <u>Note:</u> You may only enter ONE email address in this field.
- Email To field: Enter the email address you would like your customers to reply to, if they have any questions or concerns regarding their order. <u>Note:</u> You may only enter ONE email address in this field.
- **Subject Prefix** field: This setting allows you to add a prefix to the automated subject of the email receipt. Use something simple, such as your company name (eg. ABC Company Customer Receipt 12345), so that your customers can easily identify the origin of the email receipt.

\geq	Email From	
1	Email To	
	Subject Prefix	

Customer Database and Recurring Billing

The Customer Database and Recurring Billing setting in the merchant console allows you to set up the following:

- **Retry Count:** This is the number of attempts the system can process a recurring billing payment from a credit card if the first attempt results in a decline or an error. Choose the number of retry attempts from the 'Retry Count' drop down. **Note:** The max number of retry attempts is 5. The customer's recurring billing account will be disabled after the max number of attempts is reached. Contact your customer if this happens.
- API Verify Amount: This setting allows the system to verify a customer's card by charging a specific amount. Once the card is verified, the funds go back to the customer's card. Note: You must enter a value greater than or equal to 0.05 for the API Verify Amount.
- Run Billing Time For Credit Cards: This setting determines the time at which the recurring transaction for credit cards will begin processing (based on the date it is scheduled to run). Enter the time you would like your recurring billing to start running on the 'Select time for Credit Cards' field.
- Run Billing Time For Checks: This setting determines the time at which the recurring transaction for checks will begin processing (based on the date it is scheduled to run). Enter the time you would like your recurring billing to start running on the 'Select time for Checks' field.

Retry Count field		API Verify Amount fle	
5 0 4	\$	\$ 0.05	
A Select time for Credit Cards	0	C Select time for Checks	0

Product Database

The Product Database setting allows you to set your Barcode Prefix and Barcode Sequence.

- The Barcode Prefix will be first 3 numbers in a UPC (Universal Product Code) barcode. The first 3 numbers in a UPC barcode usually indicates the country the company is based in (eg. The prefix for the United States is 000-019).
- The Barcode Sequence is the following numbers after the barcode prefix. You may choose to enter any sequence for the barcode sequence of your products. **Note**: Your prefix and sequence must add up to a total of 11 digits. Using this setting will automatically update and apply all your products in your Product Database.



Batch Settings

The Batch Settings allows you to set the following:

Specific Time Auto Close Batch Every field ÷	Batch Email	E1 Batch Error Email
At		
Select time	0	
+ Add another time		
Expire Auths After		
0 days		30 days 30

 A specific amount of time or how often you want your batches to automatically close (auto-close). Choose from the 'Auto Close Batch Every' drop down menu: Specific time, Every 6 hours, 12 hours, 24 hours, 48 hours, 72 hours, or Never.

Note: Choosing 'Never' means that you would have to close your transaction batches manually. If you do not close your batch, you would not be able to receive the funds into your account because your merchant service provider did not receive it.

When you choose 'Specific Time' from the 'Auto Close Batch Every' down down menu, you will be given the option to set a specific time (in Pacific Standard Time) for when you want your batches to auto-close. You may also set multiple number of times for when you want your batches to auto-close by clicking + Add another time.

- Send Batch Reports To: Enter the email address(es) you would like to have your Batch Reports sent to. To enter multiple email addresses, separate each email with a comma.
- Send Batch Errors To: Enter the email address(es) you would like to have your Batch Errors sent to. To enter multiple email addresses, separate each email with a comma.

Note: It is important to set these email notification preferences if you have set your batch to auto-close. If an error occurs, receiving these emails allows you to immediately take the necessary steps to correct it. Contact customer support or your reseller to further assist you with any issues.

• Expire Auth Only Transactions: When an Auth Only transaction is processed, it is placed in your Queued Transactions page to await Post-Authorization. Enter the number of days you want your Auth Only transactions to remain in your Queued Transactions by choosing it from the slider or entering the value in the given field.

Note: Most AuthOnly transactions will expire in 7 to 10 business days, depending on the customer's service bank. Once a card has passed its AuthOnly expiration, you will no longer be able to run the Post-Authorization and complete the transaction. While you are unable to control the expiration dates for these transactions, this setting determines how long these AuthOnly transactions remain in your Queue. The maximum length of time that AuthOnly transactions may remain in your Queue is 30 days, but we recommend keeping this setting at 10 days.

Once you are done configuring your General Settings, click R Save

Users (User Manager)

The User Manager allows you to control how many users are permitted to process transactions, close batches, and print reports in the merchant console.

To access the User Manager page, click on 'Settings' on the side menu bar, then select 'Users' from the drop down menu.

		NEW CONSOLE DEMO MERC	HANT	Search	QEA
ː Dashboard		User Manager	6		+ Add New Use
Transactions	•	Y User	Email	Master Account	Last Login
Batches	•	andrewtesting	andrewf@usaepay.com		2016-03-08 12:52:56
Customers	Ð	charlietest	charlie@usaepay.com		2016-04-08 15:06:20
Products	•				
III Reports		danitest	danielle.dartnell@usaepay.com	· ·	2016-03-22 04:06:32
Fraud Manager	Ð	dkimmcastano	kim@usaepay.com		
X Settings	Θ	dulcetest	dulce@usaepay.com		2016-03-09 09:58:57
General	E	ishkantest	ishkan@usaepay.com	~	2016-04-13 09:31:00
Users Receipts		ishkantest2	ishkan@usaepay.com		2016-04-10 14:09:22
Payment Forms API Keys		kaylatest	kayla.hillery@usaepay.com	*	
Applications		kevin_test_16	kevin@usaepay.com		
Custom Fields		mrnewuser	kevin@usaepay.com	~	2016-03-30 09:01:34
	G	newconsole		~	2016-04-14 08:20:42

The master (primary) account of has access to all aspects of the Merchant Console including creating a new user, deleting users, assigning user rights and console permissions, and restricting IP Access.

Note: While it is possible to have more than one Master Account, we recommend that you maintain only one and create separate accounts for other users that do not include all of the privileges of the Master Account.

Add New User

Click + Add New User located at the top right hand side of your User Manager page.

Step 1: User Info: On the 'New User' pop up window, you will be asked to enter the following information on the 'User Info' tab:

- **Username**: The username must contain a minimum of 5 characters.
- Email address: The email address of the account user. This field is optional.
- Password: The password must contain a minimum of 8 characters. <u>Note</u>: All users must reset their passwords every 90 days.
- **Start page:** This is the user's home page. Choose from the following pages on the drop down menu: New Order, Simple Charge, Refund, Open Refund, Voice Auth, Customer Database, Product Database, Batch Manager, Queued Transactions, Check Manager or Upload Manager.

 Allowed IP address(es): When adding a new user, you can enter specific IP addresses from which the user can access the system and conduct transactions. To allow a user to access the system from any IP address, leave the space empty.

Once you have entered all the user's information, go to the next step.

Note: Clicking ^{Rt Save} will exit you out of the 'New User' window pop up.

User Info General Settings	
🕄 User Info	
User	🛓 johndoe
Email	☐ johndoe@domain.com
Password:	@
Retype Password:	۵ ······
Start Page:	Dashboard Panel ÷
Allowed IP's:	

Step 2: General Settings: This tab allows you to enable or disable the following settings:

Ceneral Settings	
Master Account	(ON
This grants the user master permissions.	
Allow Password Change	ON ON
	0 days. If you do not give a user permission to change their password, thay will still be void this, make sure to change their password once per 90 days.
External Software	(ON
Includes mobile payment terminals for iPhone, And	roid, Blackberry, etc that allow user login.

- Master Account: Turning this e ov grants the user master permissions. When this is er en ermissions' tab will appear. (See Step 3: Console Permissions). This tab will allow you to give users permission to view, manage, or use specific sections of the merchant console.
- Allow Password Change: Turning this • give users permission to change their password. All users must change their passwords once every 90 days. If you do not give a user permission to change their password, they will still be able to change their password if it has expired.
- External Software: Turning this will allow the user to login from iOS and Android devices.

To enable a setting, switch the button to (M. To disable a setting, switch the button to .

Click Save once you are done configuring the General Settings for the new user. If you have chosen to disable the 'Master Account' option, go to **Step 3: Console Permissions**.

Step 3: Console Permissions: You can choose to give permissions throughout different sections of merchant console such as the Dashboard, Transactions, Batches, Customers, Products, Reports, Fraud Manager, and Settings.

For example, as shown in the image below, you can choose different functions of the Transaction section.

Check the function you want to give the user permission to.

You may also select different categories within each function by turning the Advances Permission

ser Info General Settings	Console Permissions	
E Console Permissions		Advance Permissions ROFF
Dashboard	Transaction Permissions	
Transactions	New Order	Refund
Batches	Auth Only	Simple Charge
Customers	ACH	Gift Card Tools
Products	Voice Authorization	
Reports		
Fraud Manager		
Settings		

The 'Advance Permissions' button is located on the top right hand side of the Console Permissions table.

Check the subcategories you want to give the user permission to use.

Step 4: Save: Once you are done configuring the Console Permissions settings, click R Save

You will be taken back to your User Manager page, confirming that the new user has been saved.

E Console Permissions		Advance Permissions 🛛 🐼 🔗
Dashboard	Transaction Permissions	
Transactions	New Order	Refund
Batches	Order Form Settings	View Transactions
	Add Line Item	Open Refund
Customers	Save Product	Process Void
Products	Pull Existing Customer	Process Refund
	Save Customer	Transaction Details
Reports	Credit Card	
raud Manager	Authorize Only	
raud wanager	Check	
Settings	GiftCard	
	Cash	
	Auth Only	Simple Charge
	Process Auth Only	Process Simple Charge
	ACH	Gift Card Tools
	Process Simple ACH	Set Gift Card
	Process Reverse ACH	Activate Gift Card
	Process Noveral April	View Gift Transactions
		Add Funds
		Transfer Balances
		Transaction Details
	Voice Authonization	
	Process Voice Auth	

Edit A User's Information or Settings

Step 1: You can edit a user's information using one of the following methods:

1. By clicking on the user from the User Manager page

2. By right-clicking on the user from the User Manager page, and selecting 'Edit'. Both methods result in the same steps.

•	User	Email	Master Account	Last Login
[andrewtesting	andrewf@usaepay.com		2016-03-08 12:52:56
	charlietest	charlie@usaepay.com	*	2016-04-08 15:06:20
	danitest	danielle.dartnell@usaepay.com	*	2016-03-22 04:06:32
	dkimmcastano	kim@usaepay.com		
	dulcetest	dulce@usaepay.com		2016-03-09 09:58:57
	ishkantest	ishkan@usaepay.com	~	2016-04-13 09:31:00
	ishkantest2	ishkan@usaepay.com		2016-04-10 14:09:22
	kaylatest	kayla.hillery@usaepay.com	~	
	kevin_test_16	kevin@usaepay.com		
	mmewuser	kevin@usaepay.com	*	2016-03-30 09:01:34
	newconsole	#1	*	2016-04-14 08:20:42
	johndoe	johndoe@domain.com #		
ving	1 to 12 of 12 entries.		Password	

Step 2: The user's pop up window will appear where you can edit the User's Information, General Settings and Console Permissions.

O User Info	
User:	a johndoe
Email:	덛 johndoe@domain.com
Security Profile:	Configured (empty)
Allow Password Resets:	(ON
Start Page:	Dashboard Panel
Allowed IP's:	
	Leave blank tri allow user to login from all Pis Your current IP address to
	🗶 Close 🗸 Apply Hi Sa

Change User Password

A user with a master account can change any user's password at any time.

Step 1: To change a user's password, right click on the user from your User Manager page then select 'Change Password'.

		NEW C	ONSOLE DEMO MERC	CHANT	Search	Q = 4 ?
🔬 Dashboard		👗 U:	ser Manage	r		+ Add New User
S Transactions	æ	- *	User	Email	Master Account	Last Login
Batches	æ		andrewtesting	andrewf@usaepay.com		2016-03-08 12:52:56
🙁 Customers	æ		john doe	johndoe@domain.com	~	2016-04-08 15:06:20
Products	Œ		danitest	danielle.dartnel	-	2016-03-22 04:06:32
III Reports			dkimmcastano	د Change Passwor kim@usaepay.c		
Fraud Manager	Ð					
X Settings	Θ		dulcetest	dulce@usaepay.com		2016-03-09 09:58:57
General Users			ishkantest	ishkan@usaepay.com	~	2016-04-13 09:31:00
Receipte			ishkantest2	ishkan@usaepay.com		2016-04-10 14:09:22

Step 2: The 'Change Password' pop up window, as shown in the image below, will appear. Enter the user's new password on the 'Password' field. Enter the new password again on the 'Confirm Password field.

Jsername: johndoe					
Due to Visa/Mastercard	regulations,	the followin	ig requiremen	nts must be n	net for account
passwords: Passwords must	he at least 8	characters	long		
Must include at le					
Can not be the s				ords used.	
Passwords must	be change a	t least once	e per 90 days	2	
Password:	6				
	1 - 1				
Confirm Password:	â				

Note: Due to VISA and MasterCard's regulations, all account passwords must conform to the following guidelines:

- Must be at least 8 characters long.
- Must include at least one letter and one number.
- Cannot be the same as any of the previous 4 passwords used.
- Must be changed at least once every 90 days.

Step 3: Click Change Password when you're done entering the new password. You will be taken back to your User Manager page.

Delete User

Step 1: From your User Manager page, right click on the user you wish to delete then select 'Delete'.

		NEW C	ONSOLE DEMO MERO	CHANT	Search	Q = 4 ?
🔬 Dashboard		🔒 Us	ser Manage	r		+ Add New User
Transactions	Œ		User	Email	Master Account	Last Login
Batches	æ		andrewtesting	andrewf@usaepay.com		2016-03-08 12:52:56
Lustomers	æ		john doe	johndoe@domain.com	~	2016-04-08 15:06:20
Products	æ		danitest	danielle dartnell@us		2016-03-22 04:06:32
III Reports				→ Chan	ge Password	2010-03-22 04.00.32
Fraud Manager	æ		dkimmcastano	kim@usaepay.com	0	
* Settings	Θ		dulcetest	dulce@usaepay.com		2016-03-09 09:58:57
General Users			ishkantest	ishkan@usaepay.com	~	2016-04-13 09:31:00
Receipte			ishkantest2	ishkan@usaepay.com		2016-04-10 14:09:22

Step 2: A pop up window will appear to confirm the delete. Click **Confirm Delete** to continue.

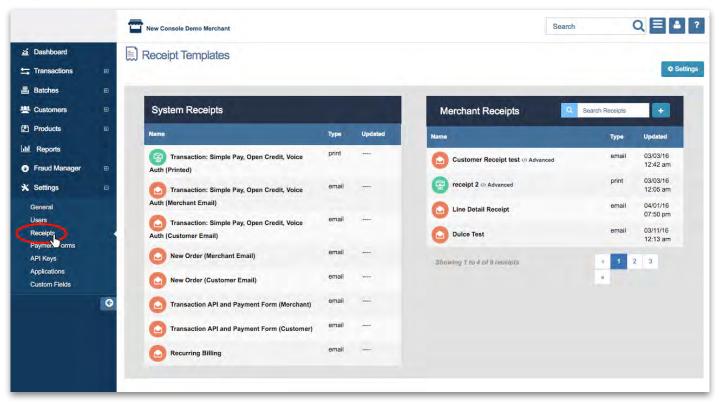
Click **D** Cancel to cancel the deleting the user.

Delete User	
You are about to delete user: johndoe. S Delete" to delete the user.	elect "Cancel" to cancel this action or "Confirm

Receipts (Receipt Templates)

The Merchant Console allows you to create and choose templates to send out to your customers every time a transaction is processed. Customized (Merchant Receipts) and default (System Receipts) receipt templates can be accessed in your Receipt Templates settings.

To access Receipt Templates, click on 'Settings' from the side menu bar then select 'Receipts' from the drop down menu.



System Receipts

System Receipts are default receipt templates included in your merchant account. You can edit and customize each system receipt's information and content.

Note: You cannot delete system receipts. The System Receipts table show all your default receipt templates included your merchant account, the type of the receipt (an email receipt or a print receipt), and the date it was last updated.

Edit and Customize a System Receipt

Step 1: Select Receipt: Click the receipt you wish to edit from the System Receipts table. For example, as shown in the image, a merchant chose to edit the 'New Order (Customer Email)'.

A window pop up will appear where you can edit the receipt's information, styling, and content.

me	Туре	Updated
Transaction: Simple Pay, Open Credit, Voice th (Printed)	print	
Transaction: Simple Pay, Open Credit, Voice the Marchant Email)	email	
Transaction: Simple Pay, Open Credit, Voice th (Customer Email)	email	
New Order (Merchant Email)	email	
New Order (Customer Email)	email	-
Transaction API and Payment Form (Merchant)	email	-
Transaction API and Payment Form (Customer)	email	-
Recurring Billing	email	

Step 2: Information: This tab lets you view and edit the receipt's information: Name and Email Subject. Enter your email address in the 'Sign Up With Your Email' field. The Receipt Name and Email Subject are named for you by default.

Change the type of the receipt by switching the (email	button to	print (). The	'Styling' tab	will not appear
when you choose to switch the receipt type to 'P	rint'.					

Receipt Information Image: New Order (Customer Email) 		3
Sign Up With Your Email		
	Your[if transaction	n.ischeck=N] card[/if][if =Y] checking account[/if]
Z Customer Receipt Email Subject		by [merchant.company].
Type email	Entry is your	i si solo di si
	Tota	al \$685.80
	Details Information	
	Merchant	(merchant.company)
	Туре	[transaction.type]
	Invoice	[transaction.invoice]
	Card Information	

Click **Apply** and proceed to **Step 3**.

Step 3: Styling: Edit the style of your email receipt template by customizing its Background, Foreground, and Accent Color. To edit the color for each, click the color field. A color guide window will appear, as shown in the image below.

Foreground Color	Colors		
Accent Color		transaction.ischeck=Y]	scheck=N] card[/if][if checking account[/if] ha merchant.company].
	*		685.80
		Details Information	
		Merchant Type	[merchant.company]
	31	Invoice	[transaction.invoice
		Card Information	

Step 4: Content: Enter your Company Name, Receipt Title, and the fields that will appear in your receipt. To add a field, click on the field button. This field will automatically be added to your receipt template. Refer to the image below.

eceipt Content			÷
Company Name			
Receipt Title		Total	685.80
		Details Information	
elds		Merchant	[merchant.company]
Credit Card	Card Number	Туре	[transaction.type]
Check	Card Holder	Invoice	[transaction.invoice]
Gift Card	Expiration Date	Card Information	
Billing	AVS Street	Customer	[transaction.customer]
Shipping	AVS Zip Code	Credit Card #	[transaction.ccnum4]
Details	AVS Result	Check Information	

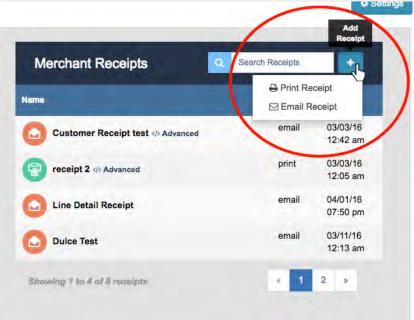
Step 5: Save Once you are done configuring the receipt template's information and settings, click save. You will be taken back to your Receipt Templates page.

Merchant Receipts

The merchant console allows all merchants to create their own merchant receipt templates.

Add A New Merchant Receipt

Step 1: The image shown below show a merchant's receipt templates. Click the ⁺ button on your 'Merchant Receipts' table. Select the type of receipt template you want to create: *Print Receipt* or *Email Receipt*.



Step 2: Information: This tab lets you enter the receipt's information: Name, Email Address, and Email Subject. The right side of this tab shows a preview of your receipt. Click Apply and proceed to Step 3.	C Email Receipt new Information Styling Content Receipt Information Receipt Name Email Email Subject Type X Cooc		Total \$685.80
ADVANCED EDITOR: To use Editing' feature to customize y template, click on Advanced Edition Advanced Edition A pop up window will appear to you want to continue. Click to continue.	our receipt	You are about to mi of your receipt. Onc the drag and drop e	move to the advanced editor which allows you to directly access the HTML noc you begin editing within this editor, you will not be allowed to return to be editor. Clicking "Cancel" will return you to the drag and drop editor. ed Editor" will send you to the advanced editor.

You will then be taken to the HTML editor window. **Note:** Once you begin editing within the Advanced Editor, you will no longer be allowed to return to the drag and drop editor. Using this editor, is optional.

cstyle>	
	.backgroundcolor{
	background: #f4f4f4;
) foregroundcolor{
	background: #/fffff ;
)
	accentolor
	color: #dddddd;
	cdiv class="row defaultreceipt backgroundcolor" style=""> <div class="col-sm-8 col-sm-offsel-2 foregroundcolor"> <div class="row"></div></div>
	 div class="col-md-12">
	<div id="receipts-header"></div>
	the algo - and a contraction of the

Once you are done editing with the Advanced Editor, click Save. You will be taken back to your Receipt Templates page. If you choose to use this advance editing feature, you DO NOT need to continue to **Steps 3 to 5**.

Step 3: Styling: Edit the style of your email receipt template by customizing its Background, Foreground, and accent color. To edit the color for each, click the color field. A color guide window will appear, as shown in the image below.

Background Color		
Foreground Color	Colors	
-	Color Wheel	Total \$685.80
Accent Color		
	31	

Click < Apply and proceed to Step 4.

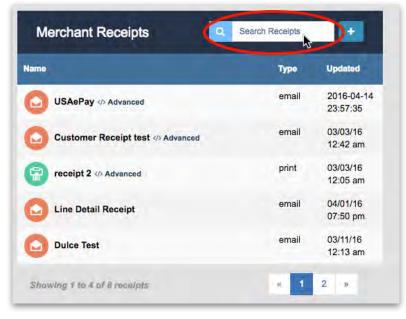
Step 4: Content: Enter your Company Name, Receipt Title, and the fields that will appear in your receipt. To add a field, click on the field button. This field will automatically be added to your receipt template. Refer to the image shown below.

nformation Styling Con	tent		
Receipt Content			
Company Name			-
Receipt Title			LAMA A. AK.
		Tot	al \$685.80
		Card Information	
Fields		Credit Card #	[transaction.ccnum4]
Credit Card	Customer ID	Customer	[transaction.customer]
Check	First Name	Expiration Date	[transaction.ccexp]
Gift Card	Last Name	Billing Information	
Billing	Сотралу	First Name	[transaction.billing_fname]
Shipping	Address	Last Name	[transaction.billing_Iname]
Details	Address 2		

Step 5: Save: Once you are done configuring the receipt template's information and settings, click Rave. You will be taken back to your Receipt Templates page.

Search For A Receipt

To search for a specific receipt template, enter the receipt template name on the 'Search Receipts' field then hit 'Enter' on your keyboard. The Merchant Receipts table will automatically update with the receipt(s) that match the criteria entered.



Receipt Settings

The Receipt Settings allows you to configure the header of a customer's email receipt.

Click Click

- *Email From* field: Enter the email address you would like to appear in the 'Email From' section of the customer's emailed receipt. Entering an email address in this field will prevent the customer from receiving an emailed receipt from an unfamiliar email address. <u>Note</u>: You may only enter ONE email address in this field.
- *Email To* field: Enter the email address you would like your customers to reply to, in the event that they have any questions or concerns regarding their order. <u>Note</u>: You may only enter ONE email address in this field.
- **Subject Prefix** field: This setting allows you to add a prefix to your automated subject of the email, in order to clearly identify the receipt for your customers. It is

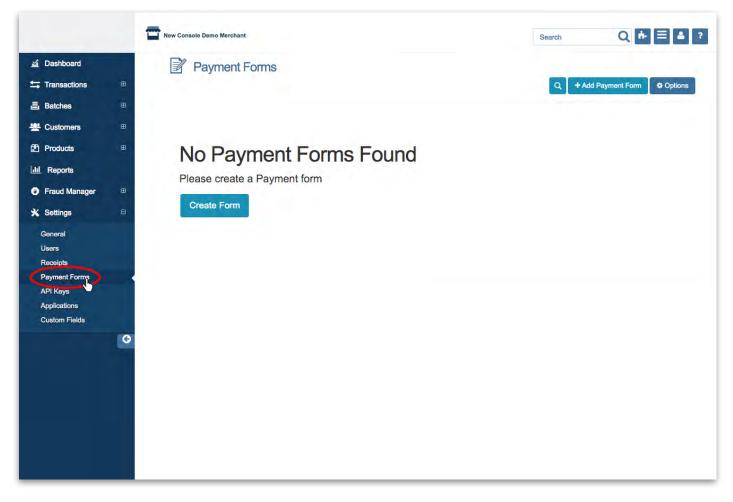
anna an				
Receipts Emailed From				
Email From				
Email Receipts To				
A Email To				
Subject Prefix				
•				
and a state of the state of the				
Rows Returned per Page				15 rovs
				a money
	te un et	i i i i	D. I.	15
	le un el	i j i i		

recommended that you use something simple, such as your company name (eg. ABC Company Customer Receipt 12345), so that customers can easily identify the origin of the email receipt.

• The *Rows Returned Per Page* sets the number of rows that will appear by default in your *System Receipts* and *Merchant Receipts* tables. You can choose the numbers of rows from the slider or by entering a specific value on the number field.

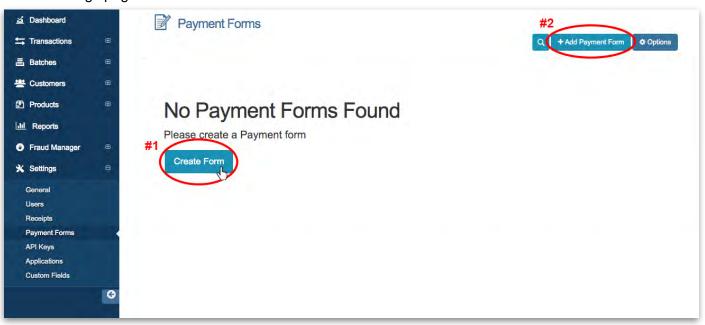
Payment Forms

The Payment Form Settings allows your customers to process secure credit card payments on your website.



Add A New Payment Form

Step 1: Create: To add a new payment form, click Create Form or + Add Payment Form from your Payment Forms settings page.



Step 2: Form Details: Choose your payment form preset type from the 'New Payment Form' pop up window: *Donation, Single Item, Multiple Items, Membership,* or *New Form.*

Enter the payment form's details: *Form Name*, and your *Email* address.

Select forn	n preset type				
	Donation	Single Item	Multiple Item	Membership	New Form
rm Details	5				
ğΞ Form N	lame				
Email					
More De	etails				
0					

Click on OMORE Details, as shown in the image above, to add the following details and settings:

- *Transaction Result* Click on the drop down menu then select the transaction result.
- **Approved URL** Enter the complete URL of the page to which the customer should be redirected once their successful transaction has received approval from the gateway.
- **Declined URL -** Enter the complete URL of the page to which the customer should be redirected if their transaction result in a decline.
- Homepage URL Enter the complete URL of the homepage of your existing website.
- Duplicate Transaction Handling -This setting allows you to prevent fraud by catching similar or identical transactions occurring within a set period of time. Note: If you are using the Duplicate Detection fraud module, you must set the Source Duplicate Transaction Handling to 'None'.

Select form preset type			
Donation Single	Item Mult	ple item Member	ship New Form
ů (3	•
orm Details			
ge Form Name			
🖭 Email			
O More Details			
Transaction Result		Allowed IPs	
Display Result	÷	& Allowed IPs - leave	e blank to allow for all IPs
Approved URL			
Approved URL		Payment Methods	
Declined URL		VISA	
Q Declined URL		100	
Homepage URL		Accepted Commands	
Homepage URL		Add Accepted Cor	mmands
Duplicate Transaction Handling			
None ÷	O Time Limit		

- Allowed IPs This allows you to restrict the number of computers on which this source key can be used. Leave this field blank to allow all IP addresses to run transactions.
- Payment Methods These methods are the payment options available through the Payment Form. The default payment options are Visa, MasterCard, American Express, Discover, Diner's Club, JCB, and electronic checks.
- Accepted Commands Choose the specific commands you want to accept in the drop down menu. These commands include the following: Credit Cards (Sale, Credit, Auth Only, Post Auth, Capture, and Void), Checks (Sale and Credit), and Point of Sale (Cash, Cash Credit, External Check, External Credit Card, and External Gift Card).

Click Next once you have filled all the necessary details for your payment form, and proceed to the next step.

Step 3: Customize: This page is where you can customize the **style** and **content** of your payment form, Approved Screen, and Declined Screen's appearance.

<u>Style</u>

Choose a custom palette available in the 'Palettes' section of the page or build your own palette by choosing specific colors for the payment form's:

- Page Background
- Header Background
- Section Header Background
- Form Background
- Text Color
- Header Text Color
- Link Color

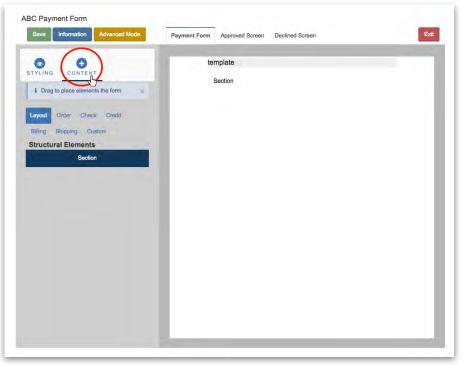
Choose a specific color by clicking the color preview box then select the desired color from the color guide.

Save Information Advanced Mode	Payment Form	Approved Screen	Declined Screen	Exit
	te	mplate		_
		Section		
PALETTES				
Goldfish				
Pugalici 🔴 🔴				
CUSTOMIZE COLORS	-			
Page Background		Colors		
Header Background	[•] 🔰 🔾 📰 🗄	1 📥 🛄		
Section Header Background				
Form Background		¢		
Text Color				
Header Text Color	1 L			
Header Text Color				

<u>Content</u>

Select the elements you want to include in your Payment Form, Approved Screen, and Declined Screen template. To add a content element, drag and drop the element button to the preview field:

- Layout: Section.
- Order: *Tip*, *Discount Code*, or *Amount*.
- Check: Account Holder Name, Routing Number, Check Number, Account Type Selector, Check Format Selector, SSN, Driver's License, Driver's License State, Check Image (Front) Uploader, or Check Image (Back) Uploader.
- Credit: Card Holder Name, Card Billing Address, Card Billing Zip Code, Card Number, Card Expiration, or CVV2/ CID Number.
- Billing: Company, First Name, Last Name, Billing Address, Billing Address 2, Billing Zip Code, Country, Email, Fax, or Website.



- Shipping: Company, First Name, Last Name, Shipping Address, Shipping Address 2, State, Zip Code, Country, or Phone.
- Custom: Input, Input with Button, Text Area, Select, Radio Buttons, Checkboxes, Static Detail, Static Text Block, or Image.

Edit the details of the element by clicking on the element input on the preview field. The 'Details' tab will appear, as shown in the image below. This tab allows you to do the following:

- Edit the Label/Name.
- Select to show or hide the label.
- Insert a Help Text: This serves as extra instructions that appear below the element.
- Select the Input Type: Number, Text, Telephone, URL, Color, Week, Date, Month, Datetime, Datetime Local, Email, or Hidden.
- Set a **Default Value**.
- Enter a Placeholder.

To delete an element input, click

STYLING CONTENT	ter	mplate		
STYLING CONTENT DETAILS		Section		
Name		Name	Name	
Hide Label				
Help Text				
Extra instructions that appear below the element.				
Input Type				
Text \$				
Default Value				
Value				
Placeholder				

From the same page, you may also edit the payment form's details (shown in **Step 2**) by clicking located at the top left hand side of the page.

ADVANCED MODE: To edit your payment form template using Advanced Mode, click on Advanced Mode

A pop up window will appear to confirm that you want to continue. To continue to the Advanced Editor, click

Nove to Advanced Ed	litor		
	n. After moving to the	e advanced ed	ou will be able to edit all of the ditor, you will no longer be able
to edit this form in the drag editor once you have chose	the second s	further edits m	ust be made in the advanced

You will then be taken to an HTML editor window. **Note:** Once you begin editing your payment form, Approved Screen or Declined Screen template with the Advanced Editor, you will no longer be allowed to return to the drag and drop editor.

	Approved Screen	Declined Screen	
DOCTYP</td <td>'E html></td> <th></th> <td></td>	'E html>		
<html lang="</td"><td>="en-us"></td><th></th><td></td></html>	="en-us">		
<head></head>			
	charset="utf-8">		
		https://maxedn.hootstrapedn.com	m/bootstrap/3.3.1/css/bootstrap.min.css">
			; } a, a:hover, a:active, a:visited {color: #000000} #formheader{ background-color:
			eft; } #form-body{ background-color: #FFFFF; } .section-header{ background-color:
		ox; text-align: left; }	
<body></body>			
	lass="row">		
	<pre>v class="hidden-xs hid v class="col-md-8"></pre>	den-sm col-md-2">	
<01	<pre><header <="" id="formheader" pre=""></header></pre>	ader">	
		tle"> template	
		lock header-description"> <td>1></td>	1>
	<div class="form-horizontal" id="form-conten</td><th></th><td></td></tr><tr><td></td><td></td><th>tform"><td></td></div>		
	<input <="" td="" type="hidden"/> <th>' name="UMsubmit" value="1"></th> <td></td>	' name="UMsubmit" value="1">	

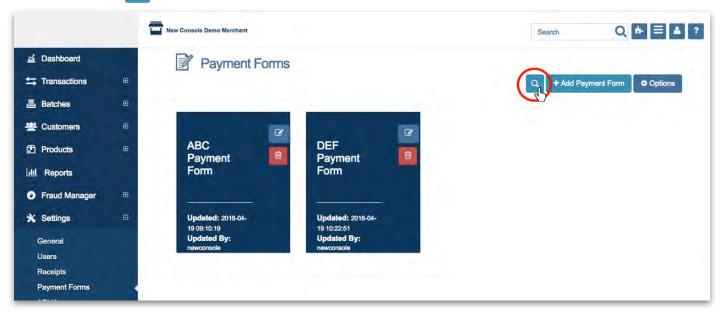
Step 4: Save: Click K when customizing your payment form is complete. Click Exit to go to your Payment Forms home page.

The Exit Editor pop up window will appear once you click **Exit**. From this window you can return to the Layout Editor, Save and Exit, or Exit the Layout Editor without saving.

	Dr				
You are a	bout to	leave the Layout Ed	itor.		

Search For A Payment Form

Step 1: Click the cicon located at the right hand side of your Payment Forms homepage.



Step 2: Enter the payment form name you want to view or edit on the open search field. Your page will automatically update once you start typing the payment form's name.

+ Add Payment Form	Options
	+ Add Payment Form

View and Edit Your Payment Form Template

You view or edit your payment form details and layout using two methods. Refer to the image shown below:

Method #1:

Step 1: Click Clocated on the payment form icon box.

		New Console Demo Merchant	Search Q 👬 🗏 🛎 ?
🔏 Dashboard		Payment Forms	
Stransactions	æ		Q + Add Payment Form Options
🗐 Batches	œ		
🐣 Customers	œ		
Products	œ	ABC Payment	
Lill Reports		Form	
Fraud Manager	œ	the second s	
🗙 Settings	Θ	Updated: 2016-04-18 15:23:41	
General		Updated By: newconsole	
Users			
Receipts Payment Forms			
API Keys			

Step 2: You will be taken to the payment form's layout page.

Edit the necessary information, details, or appearance then click Ft Save

Click to go to your Payment Forms home page.

Save Information Advanced Mode	Payment Form	Approved Screen	Declined Screen			Exit
STYLING CONTENT		mplate Section				
PALETTES		Order Number	[[UMinvoice]]			
Default		Order Description:	[[UMdescriptio	in]]		
Goldfish						
		Name	SKU	Cost	Quantity	Taxable
Pugalicir 🔴 🔴		UMline1name	UMline1sku	UMline1cost	UMline1qty	UMline'
		UMline2name	UMline2sku	UMline2cost	UMline2qty	UMline
CUSTOMIZE COLORS		UMline3name	UMline3sku	UMline3cost	UMline3qty	UMline:
Page Background	E) (E					1
Header Background		Order Date	[[UMorderdate	0		
		Order Amount	[[UMamount]]			
Section Header Background		Tax Amount	[[UMtax]]			
Form Background		Section				
		Name	[[UMname]]			
Text Color		Card Number	[[UMcard]]			
Header Text Color	-	Card	[[UMexpir]]			
Link Color		Expiration Date				
		C (10/	III IMma/911			

Method #2:

Step 1: Click on the payment form's icon box you want to edit. The payment form's pop up window will appear, as shown in the image below.

	PIN	Email Receipts To
Payment Form Approved Screen	a, 0	
Declined Screen	Transaction Result	
Preview	Display Result	Duplicate Transaction Handling
template Section	Approved URL	None
Order Number [LM/invoice]]	Approved URL	Allowed IPs
Order Description: (UMdescription)	Declined URL	allowed IPs - leave blank to allow for all IPs
Order Date	Q Declined URL	
[[LIMordendate]]	Homepage URL	Disabled Test Mode
(UMamount)	Homepage URL	
Tax Amount UM/tax	Payment Methods	
Section Name	VISA	
(UMname) Card Namber		
[UMcard]] Card Expiration Date	0	
II (Marriel)	Accepted Commands	
	Credit Card Sale 😗 Void 😗 Cash 😋	
	External Credit Card	
Delete		X Glose + Apply 🖺 Se

Step 2: Edit the necessary information or details on this window then click R Save

To edit your payment form Layout, click dit Layout . You will then be directed to the payment form's Layout page.

Edit the necessary information, details, or appearance then click	R	Save	. Click	Exit	o go to your	
Payment Forms home page.			'			

Save Information Advanced	Mode Payment Form	Approved Screen	Declined Screer			Exi
0 0	te	mplate				
STYLING CONTENT		Section				
PALETTES		Order Number	[[UMinvoice]]			
Default						
Delaut		Order Description:	[[UMdescription	11		
••		besonption.				
Goldfish 🔴 🥚			_			
		Name	SKU	Cost	Quantity	Taxa
Pugalici		UMline1name	UMline1sku	UMline1cost	UMline1qty	UMI
		UMline2name	UMline2sku	UMline2cost	UMline2qty	UMI
CUSTOMIZE COLORS		UMline3name	UMline3sku	UMline3cost	UMline3qty	UMI
Page Background						
		Order Date	[[UMorderdate]]	16 ¹		
Header Background		Order Amount	[[UMamount]]			
Section Header Background		Tax Amount	[[UMtax]]			
Form Background		Section				
		Name	[[UMname]]			
Text Color	-	Card Number	[[UMcard]]			
Header Text Color		Card	[[UMexpir]]			
		Expiration				
Link Color		Date	III IMeno 20			

The Exit Editor pop up window will appear once you click

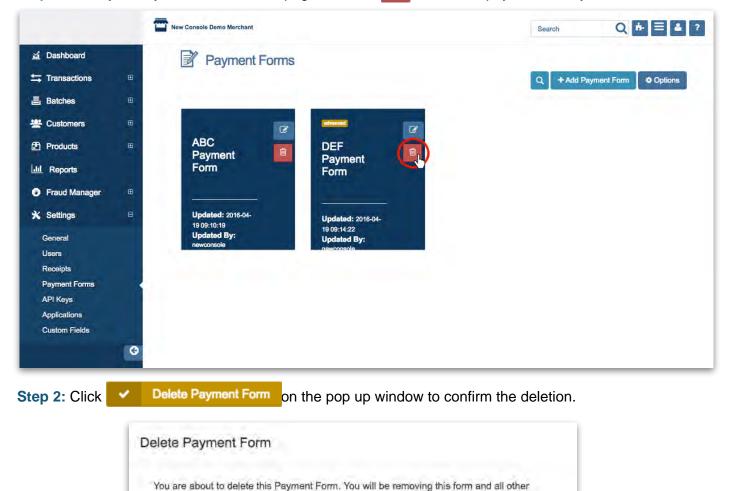
From this window you can return to the Layout Editor, Save and Exit, or Exit the Layout Editor without saving. Selecting 'Save and Exit' and 'Exit without Saving' will take you back to the payment form's pop up window.

xit Edito	Dr				
in the second	bout to	leave the Layout Ec	litor		
You are a	about to	icave ine cayour ce	ino).		
You are a	about to	leave the Layour Le	110).		

Delete A Payment Form

Step 1: From you Payment Forms home page, click the

icon on the payment form you want to delete.



3

Cancel

Delete Payment Porm

versions associated upon deletion. Do you wish to continue?

API Keys

View and edit all of the different sources that connect to your console from your API Keys Settings page, along with each API key's status, PIN, and transaction result. These sources include all internal and external system sources such as POS systems, shopping carts, eStore or payment forms. To access your API Keys, click on 'Settings' from menu side bar, the select 'API Keys' on the drop down menu.

Transactions	Ð					+ Add API K
Batches		Name +	API Key	Disabled	PIN	Dupe Folding
Customers		GeraMaster1	_8AVPLC4kT2od4syL25q06HRERQnB665	No	100	N
Products	.					
Reports		Ishkan	_MoHud0rwP26K2PXQn91joGqDws7h2n0	No	654654	N
Fraud Manager		Jenny	_q58x4s2678ju31N7h0tC49tblB9u7KX	No		N
Settings	Showi	ng 1 to 3 of 3 entries	5.			
General						
Users						
Receipts						
Payment Forms						
API Keys Applications						
Custom Fields						
	G					

An **API Key** determines the source of the transaction. Each API key is assigned a unique key used to identify the source of each transaction when it is processed through the gateway.

Rearrange Your Table

Your API Keys home page displays a list of your API Keys with the following details:

					+ Add API
*	Name	АРІ Кеу	Disabled	PIN (Dupe Folding
	GeraMaster1	_8AVPLC4kT2od4syL25q06HRERQnB665	No		F
	Jenny	_q58x4s2678ju31N7h0tC49tblB9u7KX	No		F
	Ishkan	_MoHud0rwP26K2PXQn91joGqDws7h2n0	No	654654	N
	Kim	_h2MKs5903EtGgr9fD7L5hlWY78r6FPD	Yes		N
	May	_F3Y34fRnkddj7el0hihnG1YCNoIrACO	No		N

- Name
- Assigned API Key
- Status: Disabled or Test Mode
- PIN
- Duplicate Transaction Handling Status: Fold duplicate if ALL transaction data matches (F), None (N), Fold duplicate if card # and amount matches (M), Fold duplicate if card #, amount, order ID, and source matches (O)

By Default, you API Keys are arrange by name in alphabetical order. If desired, you can rearrange this table the name of the API Key, API unique key, status: Disabled or Test Mode, PIN, or the Duplicate Transaction Handling status. As an example, to rearrange the table by the Duplicate Transaction Handling, click on 'Dupe Folding' at the top bar of the table. See image below.

Add A New API Key

Api Keys			
Name			Email Merchant Receipt To
PIN			
optional			Note: Please separate multiple email addresses with commas.
API Key			Allowed IPs
Currency			
- No Default -		ŧ	Note: Enter a whitelist of allowed IP's, each IP on its own line. Leave blank to allow all.
Disabled	Test Mode		Duplicate Transaction Handling
Allowed commands			None
Sale	Credit	Void	Time Limit (minutes)
Auth Only	Post Auth	Capture	
Check Sale	Check Credit	Payment Form	Note: You must choose "None" if you are using the Duplicate Detection fraud module
Cash Sale	Cash Credit		
			Transaction Timeout (seconds)
Payment Methods			
Visa	Mastercard	American	
Discover	JCB	Express	Expired Authorizations
Diners		E-Check	Ignore expiration and capture original auth
			Note: Your account is configured to expire authorizations after 10 days. This c be changed on the general settings page.

Step 2: Enter the following information on the pop up window:

- Name Enter the name of your source. We recommend that you use something descriptive and easy to remember.
- **PIN** This is optional. Enter the PIN number, if any.

- *Currency* If you prefer to use a default currency for the API key, select the currency type in the drop down menu. Otherwise, select 'No Default Currency'.
- **Disabled or Test Mode** Check the box 'Disabled' if you want the API key to be disabled. Check the 'Test Mode' box if you want the API key to run on test mode.
- Allowed Commands Select the commands the API key will be permitted to process. Your allowed commands should be based on who will be using the source, how public it is, and the specific fraud modules you plan to add. <u>Available commands</u>: Sale, Auth Only, Check Sale, Cash Sale, Credit, Post Auth, Check Credit, Cash Credit, Void, Capture, and Payment Form.
- **Payment Methods** Select the payment methods the API key will be permitted to process. <u>Available</u> <u>Payment Methods</u>: Visa, Discover, MasterCard, Diners, JCB, American Express, and e-Check.
- **Allowed IP's** Enter a whitelist of the allowed IP addresses, with each IP address on its own line. To allow all IP addresses, leave the field blank.
- **Duplicate Transaction Handling** This setting allows you to prevent fraud by catching similar or identical transactions occurring within a set period of time. <u>Note</u>: *If you are using the Duplicate Detection fraud module, select 'None' on the drop down menu.*
- Time Limit Enter the time limit in minutes.
- Transaction Timeout Enter the number of seconds for when the transaction times out
- **Expired Authorizations** Select from the drop down menu on what actions to take for expired authorizations.

Step 3: Click Apply or Save .<u>Note</u>: The API Key will automatically be generated by the system once you have completed filling the information and click Apply or Save .

View An API Key's Settings

Step 1: To view and edit a API Key's information or settings, click on the API key on your table.

		Nev	v Console Demo Me	rchant	Search	Q	* = 4	?
A Dashboard		🗗 A	pi Keys					
Transactions	æ						+ Add AF	PI Key
Batches	æ		Name	API Key	Disabled	PIN	Dupe Folding	
Customers	Ð	H			Contrast Contra	PIN		
Products	Ð		GeraMaster1	_8AVPLC4kT2od4syL25q06HRERQnB665	No		F	
III Reports			Jenny L	q58x4s2678ju31N7h0tC49tblB9u7KX	No		F	
			Ishkan	_MoHud0rwP26K2PXQn91joGqDws7h2n0	No	654654	N	
Fraud Manager	æ		Kim	_h2MKs5903EtGgr9fD7L5hlWY78r6FPD	No	123456	N	
K Settings	Θ		Мау	F3Y34fRnkddj7el0hihnG1YCNoIrACO	No		N	
General			indy					
Users		Showing	1 to 5 of 5 entrie	s.				
Receipts								
Payment Forms								
API Keys								

Step 2: You will be taken to that API Key's page where you can configure that API key's settings.

Name			Email Merchant Receipt To
Jenny			
PIN			
optional			Note: Please separate multiple email addresses with commas.
API Key			
	31N7h0tC49tblB9u7KX		Allowed IPs
Currency			
- No Default -		+	Note: Enter a whitelist of allowed IP's, each IP on its own line. Leave blank to allow all:
Disabled	Test Mode		Duplicate Transaction Handling
1. 2. 2. 1. 1. 1.			Fold duplicate if ALL transaction data matches
Allowed comma			Time Limit (minutes)
Sale	Credit	Void	5
Auth Only	Post Auth	Capture	Note: You must choose "None" if you are using the Duplicate Detection
Check Sale	Check Credit	Payment Form	fraud module
Cash Sale	Cash Credit	, on	
			Transaction Timeout (seconds)
1.2053.000	1		60
Payment Metho			
Visa	Mastercard	American Express	Expired Authorizations
Discover Diners	JCB	E-Check	Ignore expiration and capture original auth
			Note: Your account is configured to expire authorizations after 10 days.

Click **x** Close to return to your API Keys homepage.

Application Keys

The Application Keys page on your merchant console displays the source key of every transaction processed from a mobile application device, vTerminal, QuickSale, and an ePay Charge software. Your list will automatically be updated, whenever you use process transactions from a different application.

To access your Application Keys, click on 'Settings' from your side menu bar then select 'Applications' on the drop down menu.

	1	New Console Demo Merchant				Search	Q 👫 🗏 🛔 ?
교 Dashboard	2	Application Keys					
Transactions		Vame	 Application Key 	Disabled	PIN	Dupe Folding	
Batches	•				PIN	and a second	
😤 Customers	Œ	test	LS6GQM9oE3Es9U170X8pk81qrCZxg4vq	Yes		N	
Products	Œ	Test	by8APf94O2gUi9ABEti1Bm92K87m0x3T	Yes		N	
III Reports		test.	_D1Do796GiO0B02m6YOv22knc3U0L9Ew	No		N	
Fraud Manager	D Sh	howing 1 to 3 of 3 entries.					
X Settings	Θ						
General							
Users Receipts							
Payment Forms							
API Keys							
Applications Custom Fields							
	G						

Your API Keys home page displays a list of your Application Keys with the following details:

- Name
- Assigned Application Key
- Status: Disabled or Test Mode
- PIN
- Duplicate Transaction Handling Status: Fold duplicate if ALL transaction data matches (F), None (N), Fold duplicate if card # and amount matches (M), Fold duplicate if card #, amount, order ID, and source matches (O)

Rearrange Your Table

By Default, your Application Keys are arrange by name in alphabetical order. If desired, you can rearrange this table the name of the Application Key, its unique key, status: Disabled or Test Mode, PIN, or the Duplicate Transaction Handling status. As an example, to rearrange the table by the Duplicate Transaction Handling, click on 'Dupe Folding' at the top bar of the table. See image below.

Transactions	Œ	-	Sec. 10	-	A second state of the seco		
Batches	œ	- *	Name		Application Key	Disabled	PIN Dupe Folding
Customers	æ		test		LS6GQM9oE3Es9U170X8pk81qrCZxg4vq	Yes	N
Products	æ		Test		by8APf94O2gUi9ABEti1Bm92K87m0x3T	Yes	N
I Reports			test		_D1Do796GiO0B02m6YOv22knc3U0L9Ew	No	N

Custom Fields

The merchant console allows you to create custom fields to add in your customers' recurring billing profiles. To access your custom fields settings, click on 'Settings' from your side menu bar then select 'Custom Fields' from the drop down menu.

		T NEW CONSOLE DEMO MERCHANT 2	Search	
🖬 Dashboard		I≡ Custom Fields		
Transactions	Œ	Field Name	Searchable	
Batches	æ	+Add Enter a new field name here		
😤 Customers	Ð	Birthdate	OFF	
Products	Ð	Anniversary		
Lill Reports			OFF •	
Fraud Manager		Age	OFF ●	
X Settings		Maiden Name	OFF ●	
General Users		Mobile Number	OFF ●	
Receipts				
Payment Forms API Keys				
Applications				
Custom Fields				
	G			

Your Custom Flelds, as shown in the image above, is arranged by the date it was added (oldest to newest).

Add A Custom Field

To add a custom field, enter the name of the custom field on the open search field.

Once you enter the name of the custom field, click +Add. The new custom field will automatically be added on your list.

Note: The custom field will automatically be available in your 'Custom Fields' tab when adding a new customer or editing a customer's information.

Fleid Name	Searchable
+Add Mobile Number I	
Birthdate	OFF
Anniversary	(OFF •)
Age	OFF
Maiden Name	OFF

Make A Custom Field Searchable

To make a custom field searchable, switch the OFF • button to • • . See image below.

Note: If a custom field is searchable, you should be able to search it anywhere from an open search field in your merchant console.

Searchable		
OFF ●		
OFF ●		
OFF		
OFF		

Rename a Custom Field

Step 1: To rename a custom field, right click on the custom field you want to edit on your list then select 'Edit' as shown in the image below.

Field Name	Searchable	
+Add Enter	a new field name here	
Birthdate		OFF @
Anniversary	Telete	OFF
Age	Q	OFF
Maiden Name		OFF @
Mobile Number		OFF

Note: You can also rename a custom field by simply clicking on it. Both methods gives you the same result (see **Step 2**).



Step 2: Enter the new name of the custom field. then click the volume button to save it.

Field Name	Searchable
+Add Enter a new field name here	
Birthdate	OFF •
Anniversary	OFF
Age	OFF
Maiden Name	OFF .
Mobile Number	OFF

Delete A Custom Field

Step 1: To delete a custom field from your list, right click on that field then select 'Delete'. See image below.

Field Name	Searchable
+Add Enter a new field name here	
Birthdate	OFF
Anniversary	OFF
Age	OFF ●
Maiden Name	OFF
Mobile Number	OFF
Delete	
⊡ Edit	

Step 2: A confirmation pop up window will appear. To confirm the deletion, click Confirm

Delete Field				
Are you sure you want to delete the field Birthdate?				
	×	Cancel	â	Confirm



Technical Support: (800) 966-5520 - Option 3