



Gateway User Guide

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1) Process Transaction

1A) Overview:

The Process Transaction tab allows you to process credit card or ACH (check) transactions by entering a customer's payment information. Terminal (EMV) transactions are also supported. The virtual terminal enables you to take additional actions related to transactions, such as setting up recurring payments, adding a surcharge, configuring sales tax, saving or updating a customer profile, and more.

1B) Processing a credit card transaction:

- Navigate to the **Process Transaction** tab on the left panel.
- For new customers, enter the customer's name, the name on card, and the card details.
- For existing customers, begin typing the customer's name or customer number to receive system matches and make a selection.
- Enter the amount.
- Navigate to the bottom right corner of the page and click **Process Transaction**.



TIP! For a customer with more than one stored payment record, click the down arrow to the right of the Card Number field to choose between different cards.

1C) Processing an ACH/Check transaction:

- Click on the **Check** tab at the top of the **Process Transaction** page.
- For new customers, enter the customer's name, the name on the check, and check details.
- For existing customers, start typing the customer's name or customer number to receive system matches.
- Enter the amount.

• Click **Process Transaction** at the bottom right corner of the page.

Castoors Process Transaction				× Chur Form
buckes buckes buckers cuterers buckers buckers	Select or other a container sume Cathoner Jiteme at Others *	*	() Come	() Doat
Frand Contract Control Frand	Animan rigen	Armond Andrew *	Baddy America	
	Custom Fields Transaction Dehala			ې د
	Dilling and Shipping Info			э.
	Security Payment			
0				To create a new customer, enter a customer Total: \$0.00 Total: Content Total: Total: Total: Content Total: Conten

1D) Additional transaction data:

• Transaction details, such as the Invoice Number, PO Number, and Description, can be added by clicking on the **Transaction Details** banner.

Transaction Details			D
Involce Number	PO Nunter	Description	1

- Enter billing and shipping information by clicking on the **Billing and Shipping Info** banner.
- Shipping Info list same as billing by default. To enter separate values, uncheck the same as billing box.



• To create additional discretionary data fields, go to the **Control Panel** tab on the left panel, click on **Custom Fields**, and add up to 20 custom data fields with labels.

E Deshboard	Control Panel		
Process Transaction Batches	🗘 General Settings >>	2. User Maragement	
invoices	⊙ Back Sellings →	©: Source Monagement	
C Recording	Costan Fields.	🖲 Caulus Nonjus	
Payment Pages	C Invoke Settings	C Dight Water Serings	
Praud Controls Control Panel	🖧 Weldhoods >		

- Click the star until it turns purple to mark the field as required.
- Save

Custom Fields	
Process Instantion Post Inholds for Postson Telefor	
Banhos Control Folds will not be banner if filled out banne.	
Rivideas Control Receipt Labels for control fields must be offited separately in the Control Receipts page. To mark a field ps required, check the asterias to the left of the field. Marking a field as required only affects transactions on the Process Transaction page, not those coming via JPI.	
Castowers (8) Custow Field Name: (1) Track Number (2) Custow Field Name: (1)	
C Reams	
06 Custom Field Name: 1/2 08 Custom Field Name: 1/2 08 Custom Field Name: 1/2 09 Field Na	
© Control Fixed & Custom Field Name: 🖈 101 Custom Field Name: 🖈	
10 Coston Field Name: 🕁 12 Coston Field Name: 🕁	
10 Caston Field Name: 🛧 M Caston Field Name: 🛧	
in Lucan ren nere. S	
12 Coston Field Name: ģ	
10 Custom Field Name: 📩 20 Custom Field Name: 📩	

TIP! Custom fields can be added to Hosted Payment Pages and receipts and are visible within reporting.

• These fields will now appear under the **Custom Fields** banner in the **Process Transaction** tab.



22 Deshboard	Transaction Settin	ngs			
	CARD+ CHECK TERMINAL				
	General				
	Customer	Display			
C Recenting	Name on Card	Display			
Payment Pages	cw/cw3		Required		
Fraud Controls	AVS Street	Display			
Control Panel	AVS 25p	Otoplay			
	Surcharge	Display			
	12	Chiptay	Toqueod	Hele	
	True .	Display			
	Transaction Details Fields	Display			
		and the second se			
			100		
	Description	Display			
0					

2) Voiding/Refunding/Queuing/Recharging a transaction

2A) Overview:

Once a transaction has been processed, you can take several actions, such as voiding, queuing, adjusting, refunding, or recharging.

2B) Voiding/Refunding a transaction:

- A void can be attempted if the transaction is in an open batch. Once the batch has closed, a refund must be processed instead.
- To void or refund a transaction, navigate to the **Batches or Reports** tab on the left panel.
- Locate the transaction you wish to void or refund.



• To void the transaction, click the **Void** icon.

- For a settled transaction, click on the **Refund** icon.
- Enter the amount you wish to refund.
- Provide the CVV (if available).
- Add a description.
- Enter the customer's email address and check the box to send them a refund receipt.
- Click **Refund**.

BB Dashboard	Batches									
Process Transaction	CARD QUEUED CHECK									
Batches										
f Invoices	Batch 31101)	🖶 🖾 🌣 Customize	坐 🏦 Bat	tch Upload Card
Customers	NET PROCESSING				Refu	nd	\frown			
C Recurring	\$16.53			1	Please enter the amount for	refund.	\$16.52	\$0.00		
Reports				\$16.53	Amount Payment *		1 charges	0 credits		
9 Payment Pages	Processor First D *	Batch 1/16/2025 10	15 AM EST - »	Current Batch	3 10.03					
Fraud Controls				our out out of			_			
Control Panel				CAR			AVS RESULT			ACTIONS
	🔲 Jan 15, 2025	Chapman Floral	ABC CORP				Address: Match & 5 Digit Zip: Match	No response from association		o
						Cancel 🗸 Refund				
										a (1): \$16.53
										sd (0): \$0.00
										(1): \$0.00
										010100

2C) Queuing a transaction:

- If a transaction has not settled, you can queue the charge
- This is useful if you've run a transaction but are not yet ready to ship the product or provide the service and do not want the funds removed from the customer's account until a later date.
- Queuing a transaction will change its status to "authorized only."
- To queue a transaction, navigate to the **Batches or Reports** tab on the left panel.
- Locate the transaction you wish to queue.
- Click the **Queue** icon.

Dashboard	Batches
Process Transaction	CARD QUEUED CHECKS
Batches	
f Invoices	Current Batch 🕹 Customize 🔮 🛧 Batch Upload Card
Customers	NET PROCESSING
C Recurring	\$35.70
E Reports	Immaciona Z \$35.70 \$0.00 Average framework \$17.85 2 charges 0 credits
Payment Pages Fraud Controls	Processor: First D + Batch Current Batch + = Current Batch X Clear All
Control Panel	
	🗆 Jan 23, 2025 Charming Yows Sans Lee 🚉 +*** 6668 \$25.00 Address: Match & 5 Digit Zip: No CVV2/CVC data available f COLTINED 💉 🔕 🖉 🕦
	🗌 Jan 22, 2025 Alamo Industries John Tucker 📷 **** 1336 \$10.70 Address: Match & 5 Dight Zip: No CVV2/CVC data evailable f CLETURED 📝 🚫 🧿 🔢

- Once queued, a transaction will remain in the **Queued** tab found under **Batches** until you either **void**, **capture**, or the transaction expires.
- **Capturing** a transaction will return it to an open batch, and it will settle when the batch closes.

B Dashboard	Batches							
Process Transaction	CARD QUEUED CHECKS							
Batches Invoices	Auth Only							🎄 Customize 👱
🖨 Customers	Start 12/23/2024	End 01/23/2025					Sea	rch Q × Clear All
C Recurring								
E Reports								
Payment Pages	🗌 Jan 23, 2025	Charming Vows	Sara Lee	**** 6668	\$25.00	Auth		/ 0 0
Fraud Controls								
Control Panel								
								fotal Queued (1): \$25.00

• If no action is taken against the queued transaction, it will expire after a predetermined number of days.

TIP! You can set the number of days a queued transaction will remain valid before expiring in Control Panel> Batch Settings>Expire Auth After. Use the drop down menu to make a selection and Save changes.

2D) Adjusting a transaction:

- You can adjust the transaction amount if the batch has not yet closed.
- A transaction can only be adjusted once.
- To adjust a transaction, navigate to the **Batches Or Reports** tab on the left panel.
- Locate the transaction you wish to adjust.
- Click the Adjust icon.
- Enter the new amount and click Adjust.

88 Dashboard	Current Batch			Customiz	te 👱 🛧 Batch Uplo	ad Card
Process Transaction						
Batches	\$10.70	Adjust				
	Transactions Average Transaction	Adjusting a transaction to a higher amount is only permitted by the card brands in specific scenarios. It is the responsibility of the merchank to enforce this.	′0 ≅	\$0.00 0 credits		
Customers		Armo A transaction can only be adjusted once.				
C Recurring	Processor: First D Batch Current Batch	\$ 10.00				
E Reports		Tax Surcharge \$ 0.70 \$ 0.00	AT			
Payment Pages	Jan 22, 2025 Alamo Industries John Tucker		:: Match & 5 Digit Zip:	No CVV2/CVC data available f		
Fraud Controls		\$10.70				
Control Panel		X Cancel Adjust				
						\$10.70
	Close Batch					\$0.00
0						

TIP! Adjusting a transaction to a higher amount is only permitted by the card networks in specific scenarios. It is the merchant's responsibility to enforce this.

2E) Recharging a transaction:

- To recharge a transaction, navigate to the **Batches or Reports** tab on the left panel.
- Locate the transaction you wish to recharge.
- Click the **Recharge** icon 🧐.
- Once selected you will be redirected to the Process Transaction tab to complete the transaction.

B Dashboard	Batches
Process Transaction	CARD QUEUED CHECKS
Batches	
f Invoices	Current Batch 🕹 Customize 👱 🛧 Batch Upload Card
🖨 Customers	NET PROCESSING
C Recurring	
E Reports	Average Transaction \$10,70 \$0,00 Average Transaction \$10,70 1 charges 0 credits
Payment Pages Fraud Controls	Processor: First D.,, * Batch Current Batch * > Current Batch X Gleer All
Control Panel	□ DATE ↓ CUSTOMER NAME ON CARD CARD TYPE CARD NAMEER TOTAL AMOUNT ANS RESULT CVV RESPONSE STATUS ACTIONS
	🗌 Jan 22, 2025 Alamo Industries John Tucker 🎫 **** 1338 \$10.70 Address: Match & S Digit Zip: No CVV2/CVC data available f 💓 🔗 🛞 🕕
	Check All

3) Batches

3A) Overview:

The **Batches** tab allows you to view the current batch as well as earlier batches for credit cards, checks, and terminals. From here, you can manually close a batch, export batch reports, and view queued (authorized) transactions. It is also where the **Batch Upload** feature is located.

3B) Batch Closures:

- Batch close time can be set by navigating to **Control Panel> Batch Settings** and utilizing the "Close Batches Every:" dropdown to make a selection.
- You can set up to three automatic batch closures daily by selecting specific times (EST/EDT) and clicking

BB Deshboard	Batch Settings							
 Process Transaction Batches 	Batch Settings							
	Specific Time (EST/EDT) ^	06:00 am) 12:05 pm	0*	06:30 pm		* 5 day	
	Never							
Customers								
C Recurring	6 Hours							
	12 Hours			Added emails:				
E Reports	24 Hours			holly@accept.blue ×				
Payment Pages	36 Hours							
Fraud Controls	48 Hours							
Control Panel	72 Hours Select the nexas to include in the emailed slatch keport:							
	🗹 Company Name	Description				Auth Number		

• Open batches can also be manually closed at any time by clicking the **Close Batch** button in the bottom left corner of the **Batches** screen.

BB Dashboard	Batches										
Process Transaction	CARD QUEUED CHE										
Batches											
f Involces	Current Batch							the Cu	stomize	1 Batch Up	bload Card
🖨 Customers											
C Recurring	\$10.70										
Reports				1 \$10.70			\$10.70 1 charges	\$0.00 o credits			
9 Payment Pages		_	_								
Fraud Controls	Frocesson First D *	Eaton Current Bat	ch 👻 🗠 Cur								
Control Panel											
	🔲 Jan 22, 2025	Alamo industries	John Tucker		•••• 1338	\$10.70	Address: Match & S Digit Zip: Match	No CVV2/CVC data available for transac			
	Batch will auto-close Jan 23, 2	025 12:59 PM									
	Close Batch										\$0.00
											\$10.70

3D) Batch Uploads:

- **Batch Uploads** allows you to use a template to generate a CSV file, which can be uploaded to automatically process many transactions at once, rather than processing each transaction manually.
- To upload a card batch, navigate to the Batches tab on the left panel and click the Batch Upload card button in the top right corner of the page.
 A pop-up will appear, giving you the option to download the card template with the required headers: Amount, Card Number, Expire Year, Expire Month, and additional optional data columns.

 A
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 1
 Card Mumber ExpireMonth ExpireMax
 ExpireMonth ExpireMax
 ExpireMonth ExpireMax
 Billing Street 2
 Billing Que Case
 Billin

- Once you have configured the CSV file with your card transactions, upload it to the gateway by clicking the Upload CSV button in the Batch Upload Card pop-up.
- Click **Process Transactions**, and the gateway will automatically process all transactions.

Process Transaction Out O Out VID CHECKS Card Batch Upload Current Batch Outrent Batch	
Current Batch	
Chronicas Required Headers:	ch Upload Card
Catemany Net Processive Net	
Treactions 1) Check that any Velocity Control 70 \$0.00 in faud models are configured to allow the number of transactions in the	
Poyneam Ringes upload. Processor First D + Back Current Batch + I current 8 Processor First D + Back Current Batch + I current 8 Processor Procesor Process	
© Control fund DATE-5 Outstrates NAME (IN CASH) Cash could be to be come completed. evymation of a local, in the project of a local manual state of a local manual manual manual manual state of a local manual manua manual manual manual manual manual manual manual manua	
Jan 22, 2025 Alemo leduates John Tucker Surcharge Procent cytuani, If both are this 5 Bight 2go Match No CVV2(CVC data available for transac OLITURED // filled, chart surcharges will be applied to the base amount.	
Chock AP	
Batch will ador-close Jan 23, 2025 17:59 PM Total Charge	
Tela Noder	
Trêd Ceptur	

- You can view details and status of transactions in the **Reports** tab, just as you would for regularly processed transactions.
- To upload a batch of ACH/Check transactions, navigate to the **Batches** tab on the left panel, click on the **Checks** tab at the top of the page, and then select **Batch Upload ACH**.
- Follow the instructions as detailed for a card batch upload.
- The required headers for a check upload are: Amount, Account Number, Account Type, Routing Number, SEC Code, and Name.

B	C	D	E	F	G	н	1	J	K	L	M	N	0	P	Q	R	S	Т	U	V
1 Account Type	Routing Numbe	er SEC Code	e Company	Name	Customer Receip	t Email	Invoice Number	Amount	t Tax Percen	Surcharge Fee	Surcharge Percent	Billing First Name	Billing Last Name	Billing Street	Billing Street2	Billing City	Billing State	Billing Zip Code	Billing Phone	Billing Count
2																				
88 Dashboard		Ratcho																		
		Jatone	-5						_	_										
			EUED CHE	cxs					A1	'H Batch Llr	head									
Batches			\rightarrow						~	on batch of	noau									
		Checks														Customize		Batch Uniond ACH		
								Require	d Headers:											
							Voided Dec													
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		tart 12/23/					Ċ	inpa	ion of soccessi	a oprouo									4	
								1)	Check that	any Velocity C	ontrol									
								the	number of	transactions in	the									
								2) \	ad. When using E	xcel to create o	r edit									
						ndustries		the	CSV file,	insure all cells	are									
								can	atted as text. cause data to	become corrupte	atting id.									
								3) Sure	The templa	te contains bo	th a									
								Surc	harge Percer	t column. If bol	h are									
								filled the t	, both surcha	rges will be appl	ied to									
																			ю	
								Ų De	wnload ACH Ter	nplate 🏦 Uple	ad CSV								10	
																			10	
												_							10	
											 Process Transai 	tions							10	
																			ю	

TIP! Please check the Velocity Control settings, located in the Fraud Modules, to ensure the settings allow for batch uploads. If there are too many transactions, the gateway may block them, assuming card testing is taking place. Make sure the parameters set are higher than the number of transactions being processed.

4) Recurring and Scheduled Payments

4A) Overview:

Recurring Payments allow you to set up a schedule for transactions to run automatically according to a specified frequency. You can edit or modify the schedule at any time.

4B) Creating a Recurring/Scheduled Payment:

- To create a recurring or scheduled payment, navigate to the **Process Transaction** tab in the left panel.
- Enter the customer and card or check details as instructed in **1A**) **Processing a transaction**.
- Scroll to the bottom of the page and click the banner labeled **Recurring Payment.**
- Check the **Create recurring schedule** checkbox.
- Enter a title for this schedule in **Payment Title** field.
- Choose when the schedule should begin using the First Run (EST) calendar.
- Select a frequency for the schedule (daily, weekly, biweekly, monthly, bi monthly, quarterly, biannually, annually.)
- Enter the number of times this transaction should run or select ongoing to auto-bill until the plan is manually turned off.
- Click Process Transaction.

	ADDR Passar		
BB Dashboard	123	12345	
Process Transaction			
- Patribut	Payment Details		
() talona			
f invoices	s 150.00 0 % 0 % \$150.00		
Customers			
C Recurring		Email Customer Receipt	
17			
E resports	Custom Fields		
Payment Pages			
Fraud Controls	Transaction Details		
Control Panel			
	Billing and Shipping Info		
	Construction of the second s		
	Recurring Payment		^
	Create recurring schedule		
	Payment Title * Storage Rental #854	First Nux (IST) * Frequency *	
	Repeat this transaction: 12 Time(a) * O Onocina	Bit first transaction today (besides number of times specified)	
	0.11		
		Customer uill be undstad and Decurine Schedule uill be constant Tatal	
8		Customer will be updated and vectoring Schloute will be created. Total:	allocot Process Inantaction

TIP! If you choose a future date for the First Run, the transaction will NOT process when you click Process Transaction. It will be processed on the specified First Run date.

If you choose a future date for the First Run, the Bill First Transaction Today checkbox (beside the number of times specified) will give you the option to process a transaction today in addition to the scheduled transactions.

4C) Modifying a Recurring/Scheduled Payment:

- To modify a recurring schedule, navigate to the **Recurring** tab on the left panel.
- Locate and click the schedule you wish to edit.
- Edit schedule as desired.
- Click Update.

B Dashboard	Recurring												
 Process Transaction Batches 												۹ 👱	× Clear Filters
f invoices													
Customers	Lewis_Rental	Chapman Floral	monthly	Jan 09, 2025	02/27/2025	06/27/2025	1 of 6	\$16.53	** 2153	12 / 2043		Turn Off	
Reports	Payment Title * Lewis_Rental		Payment Me	ethod * 53				Repeat this transaction		Times () Ongo	ing		
Payment Pages Fraud Controls	Amount * \$ 15.00		Surcharge					monthly		Next Run (EST)			
 Control Panel 	тота. \$16.53											ustomer Receipt	
							l	✓ Update					
	Jan 09, 2025				++++ 2153			\$16.53					
	Showing 1 to 1 items												

TIP! Manage the number of reattempts for failed transactions and set the processing time for recurring billing transactions by navigating to Control Panel> General Settings> Recurring billing

5) Invoicing

5A) Overview:

The **Invoicing** tool allows you to send an email or text message directly from the virtual terminal to your customer. The email can include a PDF attachment with the invoice details you entered, along with any additional attachments you choose. Both the email and text message will contain a secure link to a payment form.

The payment form will display the invoice along with payment fields, allowing the customer to enter credit card, ACH (if enabled), or digital wallet details. They can also electronically sign and pay the invoice.

As part of the invoicing tool, the **Products** tab lets you store products or services with preset descriptions, prices, and other details, making it easier to add items to your invoices.

5B) Designing your invoice:

- Before creating an invoice, navigate to the **Control Panel** tab on the left panel.
- Click on Invoice Settings.
- Upload your company logo.
- Adjust how the company name, address, and contact information will be displayed on the customer's invoice.
- You can also set several defaults and configurations for your invoices, including:

-Default **Due Date** and payment terms.

-Invoice Number, which allows invoices to auto-increment from the set number.

-**Custom notifications**, your customers will be notified via email prior to, on, and/or after the due date.

-Set tax amount.

-Set a default **surcharge** (along with a surcharge label) to be applied to each invoice.

-Set **subject** and **content** of emailed invoices.

-Mandate AVS Street and/or Zip for customer entry.

• Click Save Changes.

E Destaurs	Invoice Settings						· Refer Drink
 Process transaction Balances 	Merchant Info			Couper, tess			
Contenant	* d			6793 Larson Radat		oy Research	
C Rearing				5p. Com 88480		lana) Postog ME - Maliw	
Payment Pages				None 800-123-4587		trui Import@CDNRC.com	
Control Parcel	Additional Settings				Notifications Presence		
					Enders the Concellent S Days		
	Dimpire Art Street	D Reper 275.78			Default Due Date		
	Default Surcharge						
	Net 33 Payment required on or before due date						
	Invoice Email Templates						
	Invoice from Holly's Test Account						
	Thank you for your bushness. Payment is due within thirty (30) days from the date	e ef invoice. Any discrepancies should be reporte	el willhin lourieen (14) days of receipt."				
							2.00

5C) Creating and sending an invoice:

- **Invoices** allows you to send an email or text message to a customer containing a secure link to a payment form where they can view and pay the invoice.
- To create an invoice, navigate to the **Invoices** tab on the left panel.
- Click on the **New Invoice** button in the top right corner of the page.

BB Dashboard	Invoices					the Products	+ N	ew Invoice
Process Transaction Batches	\$1,186.06	\$2,610.75			TOTAL OVERONE \$2,909.55			
Customers	All Invoices							- 2
C Recurring								
			02/08/2025	\$88.81				2
			01/18/2025	\$26.75				× 0
			ov/18/2025 (0)	\$42.80				× Z
			12/19/2024 🕘	\$10.70				× 2
			12/08/2024 (0)	\$53.50				× ×
			1\123/2024	\$55.64				
			1915/2024	\$16.05				× 2
			11/14/2024 🛞	\$10.70				* ×
			11/03/2024	\$58.85				
			19092024 🛞	\$10.70				2
								Total: \$0.00

- Enter the customer details and any additional information you wish to include.
- Enter line items:

-Add an existing product or manually enter new product details (unit cost is mandatory).

• You can apply a **tax**, **surcharge** or **discount**.

• You can adjust the **required amount** (allowing the customer to pay in two installments).

Click **Send** at the bottom of the page to send the invoice immediately or click **Save** to save it as a draft and send it later.



- Once you click Send, a window will pop up, allowing you to enter additional email addresses and/or cell phone numbers, customize the subject line and content, and attach files/system generated PDF to be sent by email with the invoice.
- Click **Send Invoice** at the bottom of the pop-up window.

Send Invoice				
Please enter email addresses.				
Audrey@chapmanflorat.com X				
Please enter phone numbers.				
1234567891 X 1234567892 X				
Invoice Subject				
Invoice from Chill Experts				
Invoice Message				
Chill Experts HVAC sent you an invoice (60) for \$25.00 that's due on January 24, 2025				
Thank you for your business. Payment is due within thinty (30) days from the date of invoice. Any discrepancies should be reported within fourteen (14) days of receipt.*				
To pay the Invoice please follow the link				
Best Regards, Chill Experts HVAC				
Attachments				
Add Files Attach System Invoice				
X Cancel Send >				

TIP! If you add an additional email address or cell phone number, press tab after typing it to save the address/number.

By default, every emailed invoice includes a PDF file attachment of the invoice unless you uncheck the "Attach System PDF" checkbox. The Add File button allows you to attach additional files.

5D) Post invoice actions:

- There are several options available once an invoice is sent.
- In the **Invoices** tab on the left panel, you'll find a listing of all invoices.
- On the right side of each invoice (under Actions), up to five action options will appear.

BB Deshboard	Invoices					de Products + New Invoice
	\$1,186.06	\$2,610.75			\$2,909.55	1
Invoices						
	All Invoices					Search Q 🛱 Filters 🗸 👱
						ACTIONS
Reports			02/08/2025	\$88.61		5 D Z
Fraud Centrols			01/18/2025	\$26.75		> \$ / B
			01/18/2025 (0)	\$42.80		> 5 × 2
	56		12/19/2024 (0)	\$10.70		D S X Z
	-		12000/2024 (0)	\$13.50		
	54		1923/2024	\$55.64		
			19/15/2024 🛞	\$16.05		> 6 × 2
	52		11/14/2024 📵	\$10,70		
			1\03/2024	\$58.85		
			11/01/2024 💿	\$10.70		\$ Þ /
	Showing 1 to 10 of 55 Jama		Remainer capacity			
						Tost
						\$0.00

- You can **Resend** an invoice, this will resend the invoice to the customer via email or text message.
- Clicking on the **Pay** icon will allow you to either pay on behalf of the customer using stored or new payment methods or mark the invoice as paid without running a transaction (e.g., paid by cash).

Pyrnert Mathda CAM OrfCX CAB natase	
01/23/2025	
Year connext	
	Payment Amount *

• If you choose the **Cash** option, you can enter a partial amount and mark the invoice as **partially paid**.



- The **Cancel** icon isables the link in the emailed invoice sent to the customer, effectively canceling the invoice.
- The **Delete** icon eletes the invoice entirely (automatically disabling the link as well).
- The **Edit** Invoice icon allows you to make changes to an existing open invoice.

Additional options can be accessed by clicking the invoice you wish to select. In the upper-right corner, you can choose from the following menu options: **Edit Invoice**, **Pay**, **Resend**, **Duplicate**, **Cancel Invoice**, **Print**, or **Copy Link**.



5E) Products and Inventory:

- You can create and store products for easy recall and addition to an invoice.
- Navigate to the **Invoices** tab on your left panel.

- Click on the **Products** button at the top-right corner of the page.
- You can create categories and sub-categories before adding products by selecting the associated tabs, or you can do this from within the + New Product tab.
- Enter as many details as you wish for the product (Product Name and Amount are mandatory).

Click **Create Product** at the bottom of the page.

BB Dashboard	< New Product			
Process Transaction				
Batches	Z Enable			
f Invoices				
🖨 Customers				
C Recurring				
🗎 Reports				
Payment Pages				
Fraud Controls				
Control Panel				
			Date Australiable	
				+ Add New
		Ship Weight		
	Millenum Quantity für order		🛃 Unlimited	
				X Cancel Create Product

6) Customers

6A) Overview:

The **Customers** tab is where all your customer information, including payment methods, is securely stored. Creating and storing customer profiles allows you to easily select existing customers when processing transactions, creating invoices, etc., so that all relevant details are prefilled.

It also provides an easy way to view and manage the transaction history and additional details for each specific customer.

6B) Storing Customer Information:

- The **Customers** tab on the left panel is where your customers and their information, including payment methods, are securely stored.
- For each stored customer, there are 5 tabs: Info, Wallet, History, Invoicing, and Recurring.

88 Dashboard	Customers		Customer Upload
 Process Transaction Batches 			
f Invoices	Alamo Industries John Tucker	NFO MALLET HISTORY INVOLONO RECUSRING	
Customers		Wallet	+ Add
C Recurring		Patrick	
Reports		(Nack	
Payment Peges			
Fraud Controls			
Control Panel		ACIA	
		12(4)	

- Info stores general contact, shipping, and billing information.
- Wallet securely stores the customer's payment methods.
- Once a credit card or ACH is entered/saved, only the last four digits are visible.
- To mark a payment method as the default, click the heart icon on the specific card.
- History records the transaction history of this customer.
- Invoicing tracks all invoices sent to this customer.
- **Recurring** records all recurring schedules associated with this customer.

TIP! Under the Wallet tab, you can view the transaction history for a specific card or ACH by clicking on the payment method and then selecting the History button. Transactions can also be processed from the wallet by selecting the card and clicking Charge or, if enabled, Authorize/Credit.



6C) Creating a new customer

When processing a transaction:

- Enter the customer's name, the name on the card, and the card details.
- Check the **Create a new customer** checkbox at the bottom of the page.



- Click Process Transaction.
- The transaction will be processed, and the customer profile will be automatically saved in the Customer vault.

Without Processing a Transaction:

- Navigate to the **Customers** tab in the left panel.
- Click on the Create New button in the upper right corner.
- Enter the customer details.
- Click Save.

22 Dashboard	Customers					1 Customer Upboad
Process Transaction Batches			Create	Customer		
1 tovoices						
Customers		Alamo Industries Created: 05/23/2024 Updated: 19/04/2024	Centeral Information			
C Recurring					Contact Information	
Reports			First Name		Enal	
Payment Pages			feed		Vielair -	Add Website
Fraud Controls			C. Mar		Ahersallye Phone	4806518282
Control Pinel			Website			
			Phone number			
			Note		Shipping Mfo Frid Name	
					LastNew	
			-		Server 1 Sorves 2	202 Bruce Wilage Suite 285
			Billing Info		City	
			Shipping Info 🔲 Same as Bill	ing ~	Try Code	
					Sale / Hovince	
				X Cancel Zone	Prov	
0						

- Next, locate the customer you just created.
- Click on the **Wallet** tab.
- Click on the **Add** button on the far-right side of the page.

- Fill in the credit card or check details.
- Click Add Payment Method.



TIP! An option to merge records can be found on the customer's info tab. This will bring up a list of customers for you to select which records to combine.

Once a customer is saved, their details will automatically populate all customer and transaction fields as you begin typing the customer's name.

6D) Creating a customer post-transaction:

- If a transaction was processed without saving the customer profile (e.g., the Create a new customer checkbox was not checked, or the transaction was processed outside of the virtual terminal), you can create a customer profile from the transaction.
- Click the transaction processed for this customer in the **Reports** tab on the left panel.
- Select the **Create Customer** button.
- Link to Customer allows you to associate the information with an existing customer.



6E) Customer Upload:

- **Customer Upload** allows you to upload a CSV file to the gateway with multiple customer profiles, rather than manually creating each one separately.
- To upload a customer file, navigate to the **Customers** tab on the left panel, and click on the **Customer Upload** button in the top right corner of the page.
- A pop-up will give you the option to **Download the customer template** with the required header: **Identifier / Company**.
- Fields can be left blank unless otherwise specified in the requirements.

TIP! When using Excel to create or edit the CSV file, ensure all cells are formatted as text. Default formatting can cause data to become corrupted.

88 Dashboard	Customers				2 Customer Upload
 Process Transaction Batches 			Customer Upload		
🖆 Annolones		NGO WALLET HISTO			
Customers		Alamo Industries Created: 05/23/2024 Updated: 01/24/2025	Tips for a successful upload		
C Recurring		General Information	Required Fields: Identifier / Company	Contact Information	
Reports		Customer	Required fields for card payment methods: Card Number, Expiry Month, Expiry Year	Enal .	
Payment Pages		Pi ol Rome	Required fields for check payment methods:	Weisle Role	
Freud Controls		Cuidumer ID	Account Number, Account Type, SEC Code	Atendalise Protec	
Control Panel		Customer #	Times Remaining (* for ongoing), Subtotal Amount		
		Billing Info	The default formatting can cause data to become corrupted.	Shipping indo Frai Name	
		Last Norma		Lord Name	
		Screet 2	recurring schedule will be created using the Card data. Surcharpe for recurring hilling is calculated	Sheet 1 Sheet 2	202 Bruce Village Suite 265
		City	as a fixed dollar amount added to the Subtotal.	City.	
		Zip Code Country	T Download Customer Template	2 gi Code Country	
		State Pypolines		Sum / Privince	
		Prote	X Cancel Vpload Customers	Poor.	

7) Reports

7A) Overview:

The **Reports** tab allows you to view a database of all transactions in a userfriendly format. With various search and filter options, you can quickly find the transaction(s) you need. You can also download, print, and email custom reports at any time.

7B) Search and Filter Reports:

- The Reports tab on the left panel is a comprehensive database of all transactions processed through this gateway account, whether they were processed within the virtual terminal or through an external source (such as a payment page, website, or software integration/plugin).
- To locate specific transactions, navigate to the **Reports** tab on the left panel.
- Use one of the 5 filters (Status, Transaction Type, Payment Type, Processors, and Date Range) to narrow down the results, or use the search bar to find transactions by specific details, such as customer name or the last four digits of the card or check.
- You can also use the **"Group By"** filter to group transactions by one of the following: **Date, Batch, Source,** or **Card Type**. When using this filter, you will have the option to display a summary of transactions.
- You can customize the amount of information displayed for each transaction by choosing the number of columns shown in reports.
- Click on the **Columns** button on the right side of the screen and select the columns you want to display.
- The button allows you to save your preferred number of columns, or you can click **Reset** to restore the default number of columns.



7C) Exporting Reports:

- You can export a custom report at any time by emailing, printing, or downloading the reports.
- To email a report, click on the *Email* icon on the right side of your screen.
- To print a report, click on the <u>Print</u> icon.
- To download a report, click on the <u>download</u> button
 The exported report will only contain the columns of data you've selected to display.



7D) Multi-MID Reporting:

- If you have access to more than one **Merchant Account**/gateway account, you can view consolidated reports from within a single account, eliminating the need to visit each **MID** separately.
- From the **Reports** tab on the left panel, click on the purple **Select Merchants** button on the right side of the screen.
- Select the accounts from which you wish to view transactions.
- Downloaded reports will include transactions from all selected accounts.



TIP! Access to multiple accounts is enabled at the user level, allowing you to access all linked accounts with a single set of login credentials.

Contact your Merchant Service Provider for assistance with linking access.

8) Fraud Center

8A) Overview:

Your **Fraud Center** provides the most advanced fraud protection tools in the payment industry. Each of the eleven modules allows you to set parameters and rules to control which transactions are accepted in your account, helping to restrict potentially fraudulent transactions.

You can set **Fraud Controls** under the **Universal Fraud Modules**. Any configured controls here will apply to all payment sources connected to the merchant account.

Additionally, you can set fraud controls for specific sources, such as payments from a **Shopping Cart** or **Hosted Payment Page**. These controls will only affect transactions from the selected source and will not impact other sources (e.g., transactions processed within the virtual terminal).

器 Dashboard	Fraud Controls		
 Process Transaction Batches 			
C Invoices	Hosted Payment Page Example	() Shapping Cart	
C Recurring	Process transaction	Invoking	
Reports	€ Recurring	🕐 Equinor Standatone	
Fraud Controls Control Panel			

88 Dashboard	Shopping Cart
Process Transaction	
Batches	
f Invoices	
Customers	P Bocker
C Recurring	CVV Response
E Reports	Courty Bicker
Payment Pages	upperature uneterno fundi Beckar
Fraud Controls	
 Control Panel 	

8B) AVS Response:

- The AVS Response module allows you to choose which transactions to accept or decline based on the Address Verification System (AVS) response.
- **Check** the responses that you will accept.
- All unchecked responses will result in declined transactions.
- Cardholders will be able to see the authorization, and merchants can choose to unblock transactions until the batch closes.
- Once the batch closes, **blocked transactions will be voided** automatically.

8C) BIN Blocker:

- The BIN Blocker module allows you to block transactions based on the first 6 digits of the card number, known as the Bank Identification Number (BIN).
- You can block transactions by: A specific **BIN** (e.g., 411111) / A **BIN range** (e.g., 411111-422222)
- This module also enables you to block cards by type, including:
 - Credit cards
 - Debit cards
 - Prepaid cards
- The review is performed prior to authorization using the BIN.
- You can limit these blocks to specific card networks, such as: Visa or Mastercard.

Or use the module to block transactions from specific card brands entirely, including:

 \circ Visa

- Mastercard
- Discover
- Amex

8D) IP Blocker:

- The IP Blocker module allows you to block transactions based on:
 - A single IP address (e.g., 192.0.0.1)
 - A range of IPs (e.g., 192.0.0.0-192.0.0.255)
 - Wildcards (e.g., 192.168..)
- To use the **Client IP** options, your shopping cart software must correctly pass the client's IP address.
- To verify if the cart is passing the client IP review the transaction details.
- If an IP address is listed next to "Client IP," then you will be able to use the **IP Blocker** module.

8E) CVV response:

- This **Card ID Verification** module allows you to select which transactions to accept or decline based on the result of the card ID verification (CVV2, CID, etc.).
- Check off the responses you will accept.
- All unchecked options will be automatically declined.
- Cardholders will be able to view the authorization.
- Merchants can choose to unblock the transaction until the batch closes.
- Once the batch closes, any blocked transactions will be **voided**.

8F) Country Blocker:

- The **Country Blocker** module allows you to block or allow transactions based on the country from which they originate.
- The location of the customer can be determined in two ways:
 - By their IP address, which is checked against our GeoIP database.
 - By using the submitted billing or shipping country information.
- To use this module with Client IP, billing address, or shipping address, your shopping cart or integration must correctly pass the relevant data to the gateway.

8G) Duplicate Detection:

- This **Duplicate Detection** module helps to detect and block duplicate transactions.
- The system identifies duplicates by checking the full card number, transaction amount, and source (such as virtual terminal, hosted page, etc.).
- You need to specify the length of time (in minutes) during which the system will look back for potential duplicate transactions.
- This module only activates after the original transaction has been successfully completed.
- **Duplicate Detection** is particularly useful in ecommerce or website applications, especially for situations where a customer accidentally clicks the process order button multiple times for the same transaction.

8H) Email Blocker

- The **Email Blocker** module blocks transactions originating from free webmail servers such as Hotmail, Yahoo, and similar services.
- Configure the module to block specific email addresses or entire domains.
- Alternatively, configure it to allow specific email addresses or domains.
- This feature is particularly effective in reducing fraud associated with unverified or disposable email accounts.

8I) Transaction Amount:

- This module restricts transaction amounts to a specific range.
- Transactions outside the defined range are blocked.
- To set only a **minimum** limit with no maximum, set the **maximum field** to zero.
- To set only a **maximum** limit with no minimum, set the **minimum field** to zero.

8J) Velocity Control:

- Velocity Control instructs the gateway to block transactions if more than a specified number are attempted within a defined time frame.
- This feature is particularly useful for preventing your merchant account from being exploited for testing stolen account data, especially through unprotected websites or checkout pages without captcha tools.

To use Client IP, ensure that your software is correctly passing the customer's IP address to the gateway.
 By default, every merchant account is equipped with a Velocity Control module set to block card-testing transactions exceeding 500 transactions within 30 minutes, effectively blocking card testing transactions that exceeds these boundaries.

8K) Risk Score:

- This module performs a real-time fraud risk assessment of transactions.
- If the resulting score exceeds a set threshold, the transaction is blocked.
- For API requests, this fraud module requires the client IP to be sent.

8L) 3DS Verification:

- This module controls the behavior for 3D Secure transactions.
- It checks only the ECI value from the 3DS provider, not the processor's 3DS response.
- 3D Secure applies exclusively to customer-submitted transactions. Fraud module should only be configured for Invoices, Hosted Payment Pages, and API-level transactions.

TIP! Risk Score and 3D Secure require a 3rd party integration

9) User Access

9A) Overview:

In the **Control Panel** tab on the left panel, the **User Management** tab allows you to manage and control user access, permissions, and default visibility for specific fields.

B Dashboard	Control Panel		
 Process Transaction Batches 	Queneral Settings		
Invoices Customers	() Rutch Settings	©v Source Management	
C Recurring	🗇 Custon Fields	🗇 Custom Receipts	
Reports Payment Pages	Invoice Settings	🔁 Digital Walet Settings	
Fraud Controls Control Panel	🛞 Webbooks		
Control Panel	Sp. Housen		

9B) Adding new users:

To add users to an account, click on the **+Create new** button on the top right corner of the page.

User Management		+ Create New	Transaction Settings
			Search Q
			ACTIONS

- Create a unique username (usernames are case sensitive)
- Enter first and last name
- Input an email address
- Select a start page (the page the user will see when they log in)
- An IP address can be entered to limit the user to logging in from specific IP address(es) only, such as the office computer
- Set user access
- Master User grants full permissions and access
- -User permissions can be individually selected for non-master users
- Click Save
- The user will receive an automated email with a link to the virtual terminal along with a username and temporary password.



TIP! If a new user claims not to have received an email, please have them check additional folders such as spam, junk, promotions etc.

9C) Limited permission users:

- There are different levels of permission and access you can grant a specific user, and they can be limited to certain features.
 e.g., you can grant a user full permission for processing a transaction, but still block access from the invoicing tool.
- Full access gives the user full permissions on these tabs/features.
- **View only** allows them to see the page and displayed information but blocks them from making any changes or taking any actions.
- Limited Access means that only the user which created this customer or invoice will have the ability to make changes to the customer profile or invoice.
- **Sale Only** allows the user to process a sale, but not an authorization, postauthorization or refund/credit.

User Permissions		
INVOICING	CUSTOMERS	BATCHES
💟 Full Access	Z Full Access	🔽 Full Access
View Only		View Only
Limited Access	Limited Access	Close Butch
PROCESS TRANSACTION		Void Course
🗹 Full Access	Z Full Access	Capture
View Only		Returd
Sale Only	RECURRING BILLING	Recharge Oustomize Page
DASHBOARD QUICK SALE	— 🔽 Full Access	Expert
Z Full Access		REPORTS
User Only		Z Full Access
PAYMENT PAGES	— 👿 Full Access	View Only
🛃 Full Access	Utew Only	
View Only		
Limited Access		
		See 1

9D) Managing users:

• On the User Management screen, you can edit user profiles,

activate/deactivate users, 📫 and delete users. 🤎

You can also restore or reset a user's password, if your permissions allow.

10) Payment Pages

10A) Overview:

The Hosted Payment Pages feature allows you to create and customize secure payment forms that customers can access to make a payment. The builder will be hosted on a generated URL/link that the merchant can place anywhere they expect their customers to visit.

10B) Building a page:

- To create a payment page, navigate to the **Payment Pages** tab and click **New Payment Page** in the top right corner.
- Enter a unique name within the **Display Name of Page** field which will be used to identify the payment page within the gateway (e.g., Chai's Treat Shop).
- Use the URL field to create a slug (the last section of the URL).
 The URL will be visible to customers when visiting the Hosted Payment Page.

-The Slug should be at least 5 characters long.

- Choose an action:
 - **Charge** default, will authorize and capture funds.
 - Auth Only places a hold on funds. Transaction would need to be captured manually
 - Save Customer/Payment Method Creates a customer record.
 Customer will not be charged.
- Select a light or dark mode theme.
- Choose a template or create the payment page from a blank template.
- Click Save.

28 Dashboard	New Payment Page	× Clear form
Process Transaction		
Intches	Configues Phymem Page Dayuy Hows Hays *	
1 Invoices	Example Hotald Payment Page	
	Ngucijov HPNnamphyngn	
() Recurring		
Reports	Exist a believe	
Payment Pages	Andre Strander	
Fraud Controls	Chunge -	
Control Panel		
	Select a Thoma	
	Toole -	
	Select a Template	
	Standard Writish Templeie Ostandard Strangelie Ostandard Strangelie	
	The second	
		Seve Seve

10C) Customizing/Editing a page:

- You will be directed to the page builder. This is where you can customize the page as desired.
- There are two sections that control the page: **Blocks** and **Design**.



- The **Blocks** section allows you to add sections, columns, fields, text, images, and more to the page. Simply drag and drop the input onto the page.
- Under **Blocks** you will find additional fields such as recurring, surcharge, terms and conditions, custom fields and more which can enhance the capabilities of your payment page.
- The **Design** section controls the appearance of the page, allowing you to customize fonts, size, colors, images, borders, and more.
- Highlight the part of the page you wish to alter by clicking on the field, text, or section, and use the **Design** section to make the changes.

• Most fields can be deleted or set to require by using the trash can or asterisk icons visible when a field is selected.

Bluing Address	
Billing City	
Billing State -	Billing Zip+
Description	

- Certain fields, such as amount, surcharge, Recurring, and description, when selected, will allow additional customization in the right sidebar, enabling you to configure these fields with preset values.
- The Display field, visible to the customer, can contain alphanumeric characters.
- The Value field represents either the total calculated by the page or the text displayed in reports.

88 Dashboard	Customize Payment Page: Chai's Treat Shop		
Process Transaction	€ Leove Editor		Save 🗸 Save and Exit
Batches	1 O D	c 🗆 D D	0 = /
f truoices			
Customers	Transaction Details		Preset Amount Display
C Recurring			Small Bag: \$10.00
Reports	Tarvice #	milling Address	\$ 10.00
Payment Pages	Customer*	miling City	Display B Meclum Beg: \$25.00
Fraud Controls	Inst	Billing States Billing Styr	\$ 25.00
Control Panel	Phone	Description	Display B
	Times - Frequency -		Value \$ 45.00
	Arount E Fee Total S S S S		Allow Other Amount
	Small Bag:		
	\$10.00 iils		
	Medium Bag		
	525.00 Check Google Pay Apple Pay		
	Large Bag		
	Card Numbers	0000 0000 0000 autor 0000	
	Months - Ynars CVVs	Cardholder Name	

• Once you're ready to save the page, click *Save and Exit* in the top right corner.

- The page URL will now be listed under the **Payment Pages** tab.
- The URL can be copied 💿 and provided to customers.

• You can always activate/deactivate, edit, or delete a page by using the icons to the right of each page.



TIP! Visit section 8) Fraud Controls to protect your hosted payment page against potential unwanted activity.

11) Control Panel

11A) Overview:

The Control Panel provides a centralized hub for managing your account settings and customizing various features. From here, you can configure essential settings such as email contacts, source management, generate API Keys for integrations, configure webhooks, customize receipts, and fine-tune other essential tools to fit your business needs. This customizable flexibility allows you to tailor your payment system to match your specific requirements.

11B) Receipt Settings:

- **Receipt Settings** control the email addresses receipts are sent to each time a transaction is processed.
- The configuration can be found under **Control Panel**> **General Settings**.
- Emails listed under **Send Transaction Emails To** will receive a notification for every successfully processed transaction.
- Emails listed under **Send Transaction Error Emails To** will receive notifications for transactions that encounter errors, such as declines, blocks or rejections.

- Errors may occur due to conflicting fraud controls or declines from the card issuer. Be sure to review the **Transaction Result** under **Reports** for more details.
- If you do not wish to receive any receipts a fictious email can be entered.



- If you would like to receive emails for only a specific source (e.g., Hosted Payment Page), you can enter a fictitious email address under **Receipt** Settings.
- Then, navigate to **Source Management**, click the **Pencil** icon to edit the desired source, and add the email address for receipt notifications under the **Email Merchant** section. Click Save to apply changes.

88 Dashboard	Source Management					+ Create Key
Process Transaction						
Batches						
f Invoices	Hosted Payment Page Example	Payment Page		NO	Jan 24, 2025	
Customers	Shopping Cart		xyjgGi48Piellipg4yfrO3Dj8xMR3CJCm	YES	Oct 30, 2024	
C Recurring	Persona kananakan	Rustian			8 20 2024	
E Reports		Jane		nio.	300 20, 2020	
Payment Pages	Involcing	System		N/A	Sep 20, 2024	
Fraud Controls	Recurring	System		N/A	Sep 20, 2024	
Control Panel	Equinox Standalone	System		N/A	Sep 20, 2024	

Email Merchant	
Email Merchant Receipt To:	
Receipt Emails: support@merchant.com × i Leave blank to use the main transaction emails.	

11C) Custom Receipts:

- Control Panel> Custom Receipts allows you to manage which fields appear on receipts.
- Simply check the box for any field you want to display.
- Use the **Label** option to rename fields to align with your business terminology (e.g., Surcharge can be renamed Service Fee).
- Be sure to save your changes.

Dashboard	Custom Recei	pts	
 Process Transaction Batches 	Subject Holly's Sandbox Receipt		
f Invoices			
Customers	Merchant Name	Merchant Name	
© Recurring	Gard Number	Card Number	••••
E Reports	Z Expiry Date	Expiry Date	
Payment Pages Fraud Controls	BIN Type		
Control Panel	Card Type		
	Name on Card	Name on Card	
	Account Type	Account Type	
	Transaction Type	Transaction Type	
	Z Routing Number	Routing Number	
	Account Number	Account Number	
	Vame on Check	Name on Check	
	🛃 Surcharge	Service Fee	S
	🗹 Tax	Тах	\$
	Mount	Amount	\$
	Total Amount	Total Amount	\$
3	Zompany Name	Company Name	

11D) Generate API Keys:

- API keys allow integrations to communicate with the gateway.
- To generate an API Key navigate to **Control Panel**> **Source Management** and select + **Create Key.**

22 Dashboard	Source Management					+ Create Key
Precess Transaction						Search Q
Batches						
Invoices	Hosted Payment Page Example	Payment Page			Jan 24, 2025	
Customers	Shapping Cart		xyg0i48Ptx8lpp4yfr030glxMR3C.iCm		Oct 30, 2024	
C Recurring	Borners Instantion	Sustan		100	See 30 3034	
E Reports						
Payment Pages	Invoicing	System			Sep 20, 2024	
Traud Controls	Recurring	System			Sep 20, 2024	
Control Panel	Equino: Standalone	System			Sep 20, 2024	

- Create a Name for the source. This is utilized to identify the record within the gateway. Ex: WooCommerce Shopping Cart
- A Pin is optional and can be set to a value of your choosing.
- Select Allowed Commands. These are the functions you would like to allow through this connection.
- Confirm Payment Methods, align with what you would like the integration to process.
- Select Save
- The API Key will generate beside the name you inputted on the **source management** tab.

< Source Info	
Source Info	Enabled
Source key type: API	
Integration Name	m
Ignore universal fraud rules	

Email Merchant					
Email Merchant Receipt Yo:					
Ensure blank to use the main transaction emails.					
Allowed Commands					
Credit card commands			E-Check commands		
Z Charge	🗹 Void	Adjust	Check Charge	🗹 Check Void	Z Check Refund
Z Capture	Refund	🛃 Auth Only			
Sost Auth					
Payment Methods					
Choose Payment Methods		_			
VISA		•	CONTRACTOR OF CO	DISCOVER	
🗹 Visa	Me	aster Card	Z American Express	Z Discover	Z E-check
					Sive

11E) Generate Tokenization Key:

- Select Control Panel> Source Management> + Create Key
- Set source key type to Tokenization
- Create a Name for the source. This is utilized to identify the record within the gateway. Ex: WooCommerce Shopping Cart
- The Tokenization Key will generate beside the name you inputted on the **source management** tab.

22 Dashboard	Source Info	
Process Transaction		
Batches	Source Info	
	Source key type: Tokenization	
C Recurring	Name *	
Control Panel		

11F) Digital Wallet Settings

- Digital Wallets are automatically supported when utilizing Invoices and Hosted Payment Pages. Effectively allowing customers to utilize their preferred payment method.
- **Digital Wallet Settings** found within **Control Panel** can be utilized to configure Google Pay and Apple Pay for API integrations or to disable Digital Wallets within the gateway.