

PayeezySM Gateway
(Formerly GGe4)
**Real Time Payment
Manager**



EPICOR.
Payment Exchange.

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Introduction

Payeezy Gateway, or Real-time Payment Manager (RPM) is a fully functional online payment gateway that allows you to securely post a variety of bankcard transactions. You can post manually keyed or swiped purchases, returns, as well as obtain authorizations and utilize AVS/MOTO capabilities. (Address Verification / Mail Order Telephone Order). Customer receipts may be printed, with a printer attached to your PC, or emailed. You can post individual transactions or upload up to 250 transactions using a .csv file. The **Transactions** tab allows you to view, search and retrieve transaction details.

Administrative and Preference features allow you to add users, set defaults and modify your Payeezy Gateway display.

The Payeezy Gateway can be viewed through your browser using; Mozilla Firefox 31.0 or higher, Google Chrome and Safari. You must enable cookies. Access Payeezy Gateway e4 at; <https://epicor.globalgatewaye4.firstdata.com>.

For a quick overview of Payeezy Gateway and its features click this link; http://media.globalgatewaye4.firstdata.com/GGE4_demos/ecommerce_GGe4_demo.htm

You may view posted and settled transactions online with ClientLine or AccessOne.

1 Login and Navigation

You will receive 2 separate e-mails with your login information. One email will contain your **User ID** and the other email will contain your **Password**. Use this information to log into your Payeezy Gateway account.

Logging In

- Go to <https://epicor.globalgatewaye4.firstdata.com>
- Enter your User Login and Password. Press Login.
- If this is your first login you will be prompted to change your password. See next section on changing your password.
- Once logged on you will be at the Payeezy Gateway Real-time Payment Manager (RPM) Homepage.

Changing Password

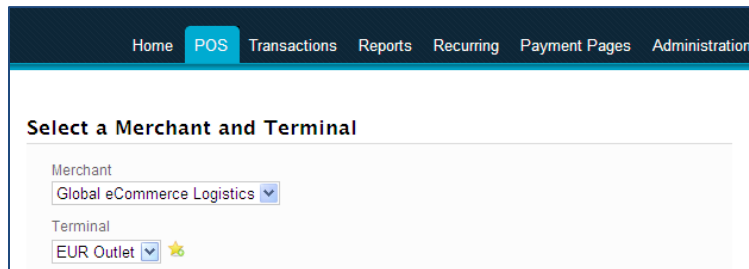
When you first login you will be prompted to change your password and answer security questions. Every 90 days you will be prompted to change your password. Your password must contain at least one number. Enter your current password under the user name and the new password. Type the new password again to confirm.

If you enter your password incorrectly more than 3 times you will be locked-out for 24 hours and unable to login unless your User ID is reset. If this happens please contact your Merchant Administrator.

After 20 minutes of inactivity you will be automatically logged out and must log in again.

2 POS Tab - Entering a Transaction

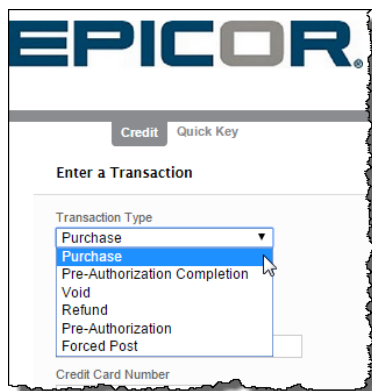
General Information



Click the POS tab to process transactions.

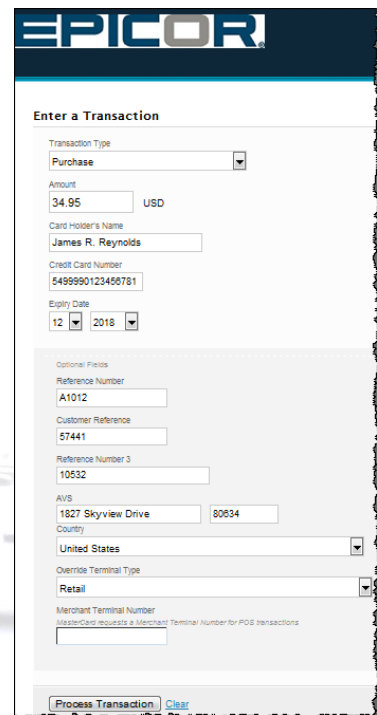
Select the correct **Terminal** (if multi-location) -. If there is only one terminal, it is automatically selected for you.

Next select the **Transaction Type**. You can conduct Pre-Authorization, Pre-Authorization Completion, Purchase, Refund,



Void and Forced Post transactions within POS. Select users can also be authorized to do open refunds. Zero dollar pre- authorizations are supported by Payeezy Gateway.

To perform this type of transaction, use the regular pre- authorization transaction type and submit it with a zero dollar amount. If required, an additional 15% of the dollar value of the authorization can be levied when making a pre-authorization completion transaction.



Enter the dollar amount in the **Amount** field. Cardholder name required character format is ASCII.

Change the **currency** for the transaction (Available for multi-currency enabled terminals only). Note that all terminals have the drop down menu for changing the currency but you should only change it if your account was set up for multiple currencies.

Enter the **Card Holder's Name** exactly as it appears on the card. Enter the **Credit Card Number** and the expiration date (**Expiry Date**) month and year.

Note: If you have a credit card reader you may simply place the cursor in the **Credit Card Number** field and swipe the card. The **Credit Card Number, Card Holder's Name** and **Expiry Date** fields will all automatically populate.

Next you may enter any **Reference Number** or **Customer Reference** information (if required). A Reference Number is provided by your internal referencing system and will display on the Customer Transaction Record (CTR) and in Member Services SEARCH. The reference fields are optional fields. The following characters will be stripped from the reference fields: ; ` " / % as well as -- (2 consecutive dashes). Reference number required character format is ASCII. Customer Reference Number is another internal reference (but not displayed on the CTR).

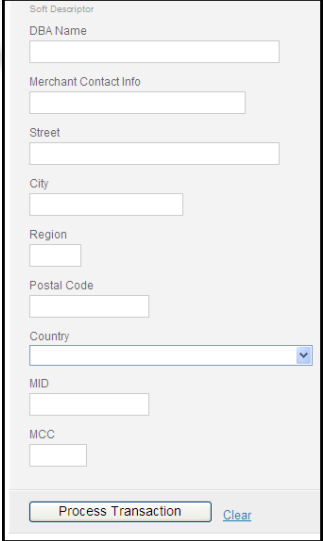
Address Verification String is used for the **AVS** system. This checks cardholder addresses against records at the credit card companies and rates the level of match (see Appendix). To enter the Address Verification String correctly, use the following format: **Street Address, Zip/Postal, City, State/Prov, Country**. Some additional rules apply. Separate numerals always require a space between them. You cannot enter more than 29 characters. If exceeded, drop the street address information and make sure zip code is complete. For nine digit zip codes drop the dash. City and Province required character format is ASCII.

The **Override Terminal Type** field has a dropdown that allows you to choose a different terminal type.

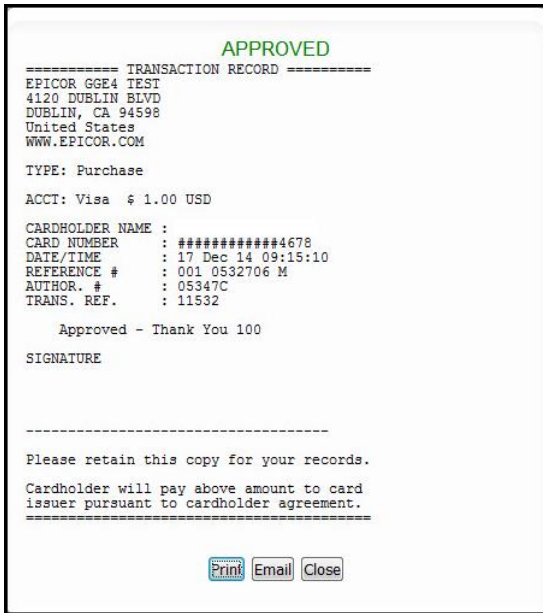
Optional **Soft Descriptor** fields can be turned on under the **Administrator** tab. These fields allow you to enter optional descriptions and information to appear on a customer's credit card statement. Entering this information can help to reduce the risk of chargebacks.

Click the **Process Transaction** button to complete the transaction.

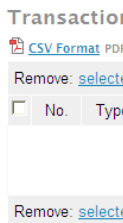
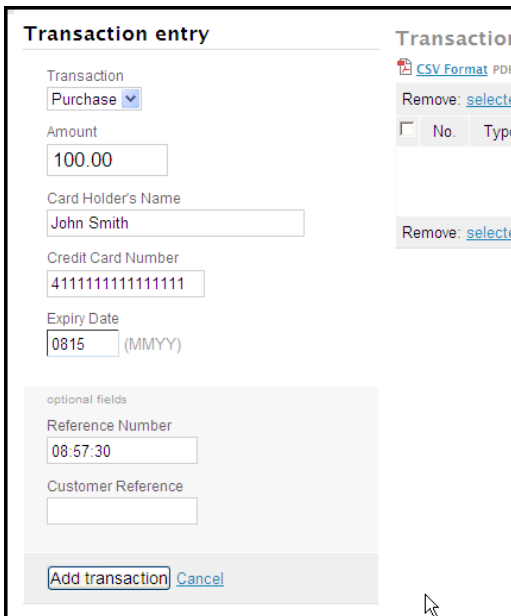
A receipt will display on the screen (shown below). If you have a printer connected to your terminal you may **Print** the receipt or you may **Email receipt** to your customer. When referencing a receipt pay close attention to the **TYPE** field.



The screenshot shows a 'Soft Descriptor' form with the following fields: DBA Name, Merchant Contact Info, Street, City, Region, Postal Code, Country (dropdown menu), MID, and MCC. At the bottom of the form are two buttons: 'Process Transaction' and 'Clear'.



The **Quick Key** selection allows you to enter a transaction more quickly than the previously described **Single Input** method.



Select the **Transaction** type; enter the **Amount**, card information and references. Click **Add transactions**. The transaction will display to the right of the entry screen as shown below.

Transactions Process Upload File									
Remove: selected all									Total \$100.00
<input type="checkbox"/>	No.	Type	Amount	Card Holder's Name	Card Number	Expiry	Reference #	Customer Ref.	Status
<input type="checkbox"/>	1	Purchase	\$100.00	John Smith	4111111111111111	0815	08:57:30		Not processed
Remove: selected all									

You can upload a batch of up to 250 transactions from a .csv file by clicking **Upload File**.

When you are finished with your entries you may click on the **Process** button. Batch totals display at the top of the screen and a green check indicates that all of the transactions have been processed.

Transactions Process Upload File									
Remove: selected all									Total \$2,613.13
<input type="checkbox"/>	No.	Type	Amount	Card Holder's Name	Card Number	Expiry	Reference #	Customer Ref.	Status
<input type="checkbox"/>	1	Purchase	\$42.89	Margaret Lehman	4111111111111111	0312	REF_1_42.88564971250	Cust_Ref_42.88564971	✓
<input type="checkbox"/>	2	Purchase	\$59.09	Vivienne L. Long-Speer	5500000000000004	0312	REF_1_59.08799270442	Cust_Ref_59.08799270	✓

Purchases Approved 50 / 50 (Total: \$2,613.13)

Remove Approved / Remove All

Time: 27.31 sec

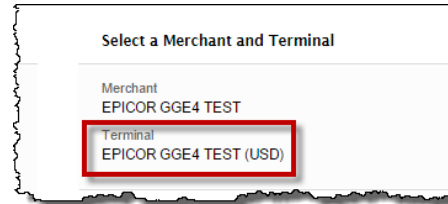
Next enter the authorization information (if required). Authorization Number is an alternative option to using 'Transactions' to do a Pre-Authorization Completion. You can only conduct a refund through POS if you have a pre-set refund level; otherwise refunds can be conducted more easily through Transactions.

Soft Descriptor Fields - Merchant Administrators can enable soft descriptor support for a terminal by going to Administration -> Terminals, then clicking the appropriate terminal name, and enabling the "Allow Soft Descriptors" option as seen below. If you decide to use the soft descriptor fields we recommend you read this [best practices article](#) first. The following Soft Descriptor fields are required to be in ASCII format: DBA Name, Merchant Contact Info., Street, City, and Region.

Note: For two stage transactions (pre-auth/completion), the reference number utilized at the time of pre-authorization will be utilized at time of transaction completion. An override of this value is not supported. The consistent usage of values enables a merchant to achieve the best interchange rates and least re-authorizations. Typically, the reference number field is the purchase order number or unique sequence value associated to a given transaction suite.

Purchase Transaction

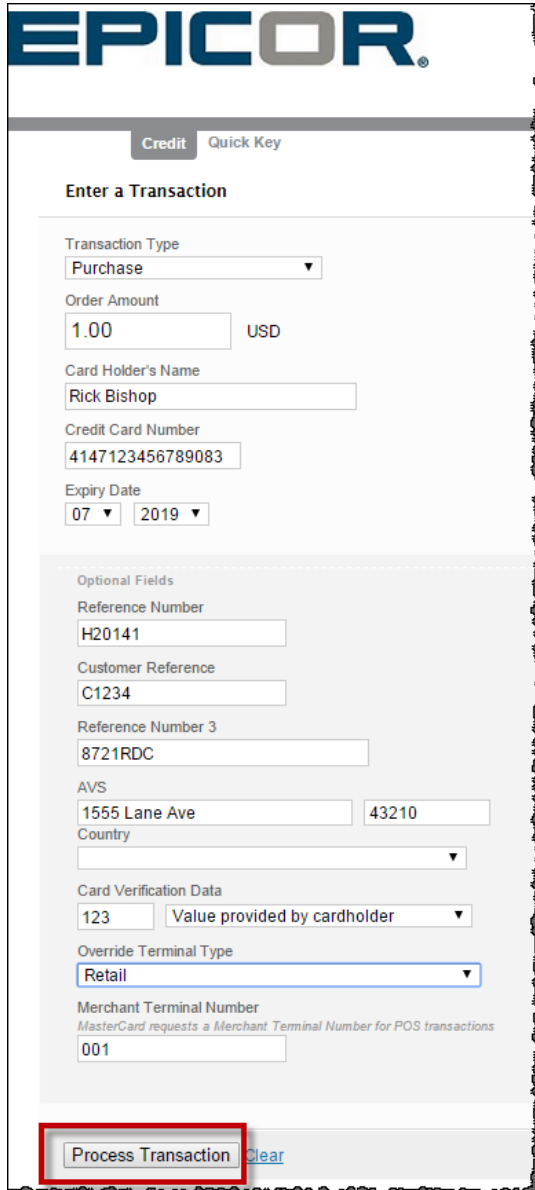
For Multi-location (multi-terminal) users, be sure to select the appropriate terminal on the POS window before completing any transaction.



Select a Merchant and Terminal

Merchant
EPICOR GGE4 TEST

Terminal
EPICOR GGE4 TEST (USD)



EPICOR

Credit Quick Key

Enter a Transaction

Transaction Type
Purchase

Order Amount
1.00 USD

Card Holder's Name
Rick Bishop

Credit Card Number
4147123456789083

Expiry Date
07 2019

Optional Fields

Reference Number
H20141

Customer Reference
C1234

Reference Number 3
8721RDC

AVS
1555 Lane Ave 43210

Country

Card Verification Data
123 Value provided by cardholder

Override Terminal Type
Retail

Merchant Terminal Number
MasterCard requests a Merchant Terminal Number for POS transactions
001

Process Transaction Clear

Select **Purchase** from the **Transaction Type** dropdown. Enter the dollar amount of the sale in the **Order Amount** field. Enter the **Card Holder's Name** exactly as it appears on the card. Enter the **Credit Card Number**, Expiration date (**Expiry Date**). The **Reference Number** is searchable and it is recommended that you enter a document number or some other reference to the item being sold, but this is not a requirement. **Customer Reference** and **Reference Number 3** are also optional fields.

The **AVS** or address verification field may not be required, however your terminal can be configured to require and validate the customer's billing information. It is recommended that you always enter the customer's billing zip code for slightly lower interchange on manually keyed transactions.

Card Verification Data, is also optional but once again your Payeezy terminal can be configured to require and validate this information.

Terminals other than the default terminal may be chosen from the **Override Terminal Type** dropdown.

Any desired value may be entered in the **Merchant Terminal Number** field.

Verify that all information is correct before pressing the **Process Transaction** button at the bottom of the screen.

Refund Transaction

Select **Refund** from the **Transaction Type** dropdown to credit a cardholder's account. Complete the fields as described above and select **Process Transaction**.

Void Transaction

EPICOR

Credit Quick Key

Enter a Transaction

Transaction Type
Void

Order Amount
1.00 USD

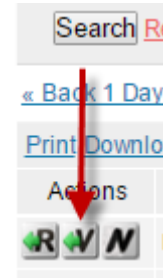
Card Holder's Name
Wayne W. Hayes

Credit Card Number
4147123456789083

Expiry Date
07 2015

Authorization Number
123456

A void can be accomplished before settlement on the same day that the original transaction was entered. Voids are most often and more easily performed by locating the original transaction in the **Transactions** tab (described in the following section) and choose the “V” button next to the transaction.



However you may select **Void** from the **Transaction Type** dropdown. Complete the fields as indicated on the left. The **Authorization Number** must be provided.

Forced Post

A **Forced Post** transaction is used to enter a transaction with a previous authorization that has not yet been completed or charged to the cardholder. Like a void transaction, a valid authorization code is required. This transaction type could be used to re-enter offline transactions that did not properly update. It is very important that only recent valid authorization codes be entered.

Pre-Authorization

Choosing **Pre-Authorization** from the **Transaction Type** dropdown allows you to obtain an approval code, but does not charge the customer's account. Enter fields as described above in the **Purchase** section and click **Process Transaction**.

EPICOR

Credit Quick Key

Enter a Transaction

Transaction Type
Pre-Authorization

Order Amount
1.00 USD

Card Holder's Name
Rick Bishop

Credit Card Number
4147123456789083

Expiry Date
07 2019

Optional Fields
Reference Number

Note: The receipt (shown left) may look like a purchase receipt, it is clearly noted “Pre-Authorization in the **Type** field.

EPICOR

Credit Quick Key

Enter a Transaction

Transaction Type
Pre-Authorization

Order Amount
1.00 USD

Card Holder's Name
Rick Bishop

Credit Card Number
4147123456789083

Expiry Date
07 2019

Optional Fields
Reference Number

Pre-Authorization Completion

To charge a cardholder's account after obtaining an authorization select **Pre-Authorization Completion** from the **Transaction Type** dropdown. A valid approval code must be entered as shown at right. Click the **Process Transaction** button.

An easier method to complete a pre-authorized transaction may be to locate it in the **Transactions** tab and select the **C** button in the **Actions** column.

EPICOR

Credit Quick Key

Enter a Transaction

Transaction Type
Pre-Authorization Completion

Order Amount
1.00 USD

Card Holder's Name
Rick Bishop

Credit Card Number
4147123456789083

Expiry Date
07 2015

Authorization Number
01327C

Search
A1234
(Card Holder, Reference)

Date
Custom 2015/07/13 00:00 to 2015/07/14 23:59

Merchant Account
EPICOR GGE4 TEST

Terminal
EPICOR GGE4 TEST

Search Reset

Actions Card Holder Card Amount Card Number Expiry Transaction Status

Actions	Card Holder	Card	Amount	Card Number	Expiry	Transaction	Status
	Rick Bishop	VISA	1.00 USD	#####9083	01/17	Pre-Authorization	20

Verify the **Completion Amount** and complete the transaction for any amount up to the Maximum amount. Click **Submit Transaction**.

Print Download CSV

Actions Card Holder Ca

Complete Pre-authorized Transaction

Transaction Tag
970797440

Completion Amount
1.00 USD
(Maximum amount USD 2.00)

Reference Number
1234

Submit Transaction Cancel

Pre-Authorization-Voids, Edits & New Transactions

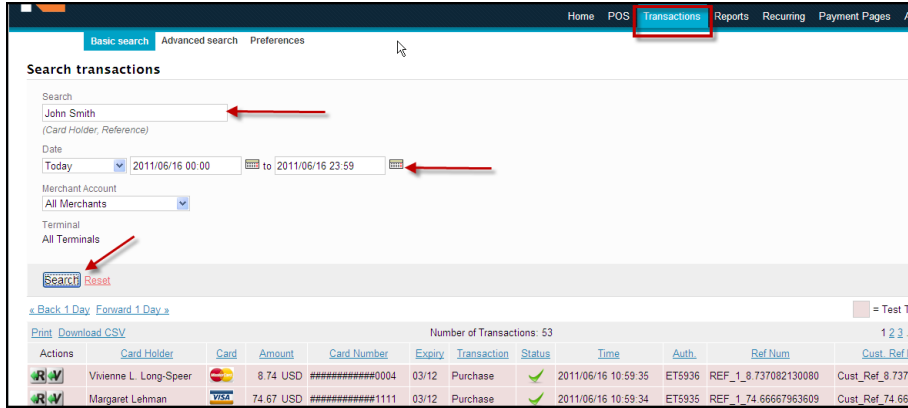
A pre-authorization may be voided beyond the transaction date. The procedure is quite similar to the completion step shown above. Select the **V** button in the **Actions** column and click the **Submit Transaction** button.

Other buttons in the **Actions** column allow you to; edit the reference numbers (Pencil icon) and create a new transaction (**N**).

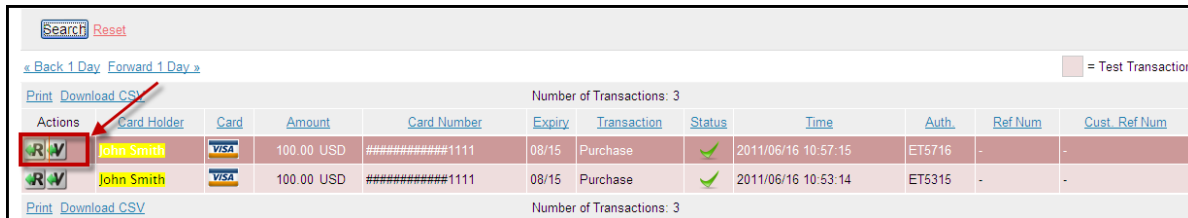
3 Transaction Tab –

The **Transactions** tab was referenced in the previous section but the examples below will describe additional features.

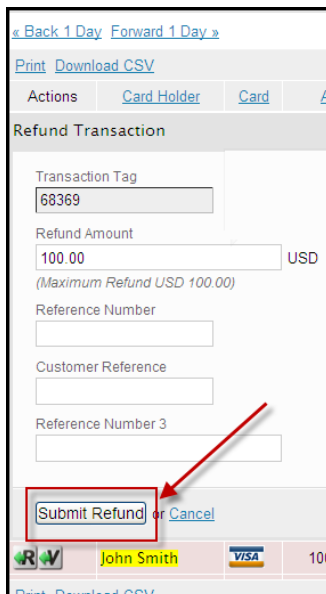
Basic Search



Select **Basic search**, enter the search string in the **Search** field and select the appropriate date range. Click the **Search** button.



You can create a refund by clicking on the displayed transaction's **R** button or void the transaction by clicking **V**. An example of a refund is shown below.



Fill in the **Refund Amount** (up to the maximum indicated), complete optional reference information and click **Submit Refund** button. A receipt showing the refund will display, it can be printed or emailed as described above in section 2.

Click the **V** button next to the transaction to Void. Click the **Void Transaction** button to complete the void. A receipt showing the void will display, it can be printed or emailed as described above in section 2.

John Smith

VISA

Void Transaction

Tag
68519

Amount
8.74 USD

Reference Number
REF_1_8.737082130080

Void Transaction or Cancel

You can view audit history for a transaction by clicking on the clock icon next to the transaction.

Print Download CSV

Actions	Card Hold
	Vivienne L. Long
	John Smith



Advanced Search

The **Advanced search** tab gives you full feature search capability. You can search records by;

- Cardholder reference number
- Single date or date range
- Multi or single location
- Transaction type
- Card type
- Status
- Currency
- Dollar amount

Basic search **Advanced search** Preferences

Search transactions

Search: **Card Holder** Ref Num Auth Card Number Cust Ref Tag
John Smith
(Auth, Credit Card, Card Holder, Reference)

Date: Today 2011/06/16 00:00 to 2011/06/16 23:59

Merchant Account: All Merchants

Terminal: All Terminals

Type: Purchase

Card Type Select: All None [Icons]

Status: All Currency: All

Amount: From: To:

Per Page: 10 Records

The number of records shown (10, 100)

Search Reset

An example of the **Advanced search** is shown above. Select the search criteria and enter the search string, then click the **Search** button.

Print Download CSV Number of Transactions: 3

Actions	Card Holder	Card	Amount	Card Number	Expiry	Transaction	Status	Time	Auth.	Ref Num	Cust. Ref Num
	John Smith	VISA	100.00 USD	#####1111	08/15	Purchase		2011/06/16 10:57:15	ET5716	-	-
	John Smith	VISA	100.00 USD	#####1111	08/15	Purchase		2011/06/16 10:53:14	ET5315	-	-

Print Download CSV Number of Transactions: 3

Select the transaction you wish to view and the details display as shown below.

Search results

← Back 1 Day Forward 1 Day → = Test

Print Download CSV Number of Transactions: 3

Actions	Card Holder	Card	Amount	Card Number	Expiry	Transaction	Status	Time	Auth.	Ref Num	Cust. R
	John Smith	VISA	100.00 USD	#####1111	08/15	Purchase		2011/06/16 10:57:15	ET5716	-	-

Transaction Tag 68366 (close)

Status	Credit Card	Authorization Num	Processing Centre	CAVV
Approved more...	VISA	ET5315	First Data	No CAVV
Type	Credit Card Number	Reference Num	Transaction Time	CAVV Response
Purchase	#####1111	Not Available	2011/06/16 10:53:14	Not Available
Amount	Card Holder	Customer Reference	ECI	AVS Result
100.00 USD	John Smith	Not Available	000	Not Available
Gateway ID	Expiry Date	Reference Number 3	User	CVV2 Result
A00038-01	08/15	Not Available	katy.joy@firstdata.com	(M) - CVV2 / CVC2/CVD Match
		Transaction Reference		
		001 0007701 M		

Preferences Tab

You can customize the look of your screen by clicking the **Preferences** tab.

Basic search Advanced search **Preferences**

Update Preferences

Use the left and right arrows to add or remove the columns you require in the Search results. Use the up and down arrows to determine the order of column display.

Columns To Show ← → **Columns To Hide**

Card Holder
Card
Amount
Card Number
Transaction
Status
Time
Ref Num
Cust. Ref Num

Save

Expiry
Auth.

← Back 1 Day Forward 1 Day → = Test Transaction

Print Download CSV Number of Transactions: 3

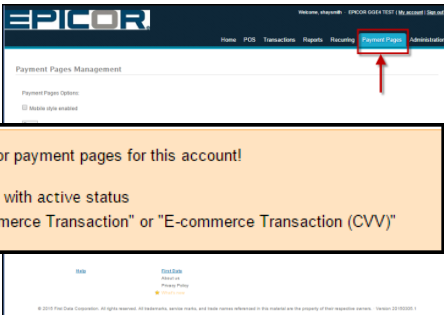
Hide columns by clicking and highlighting them from **Columns To Show** then click the right arrow → to move them into **Columns To Hide**. Highlight columns in **Columns To Hide** and use the left arrow ← to redisplay them. Click the **Save** button to save your changes.

4 Payment Page Setup for iNet users

Follow the steps in section 1 to log into your Payeezy Gateway account **be sure to select your eCommerce/iNet Merchant ID** if multiple MID's are listed. From the **Home** page you may click on **Payment Pages** to begin. However, you may wish to follow the preliminary steps outlined below to properly configure your payment page.

Set terminal type to E-Commerce

Your terminal type must be set to "E-Commerce". If you see a message as shown here you must change the terminal type.

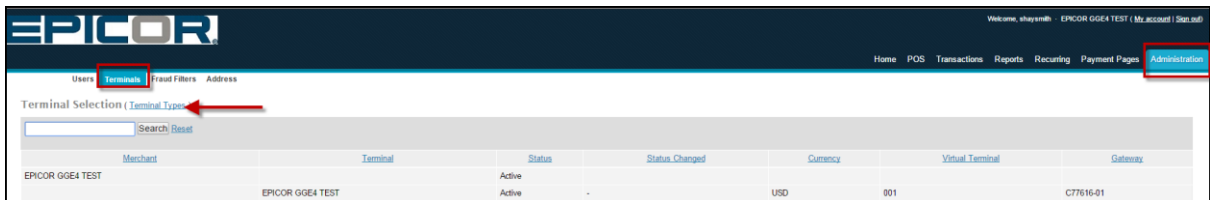


The screenshot shows the Epicor Payment Pages Management page. A red arrow points to the "Payment Pages" tab in the top navigation bar. Below the navigation bar, there is a message box with the following text:

There are no terminals suitable for payment pages for this account!
Please ensure the following:

- you have at least one terminal with active status
- terminal is set to type "E-commerce Transaction" or "E-commerce Transaction (CVV)"

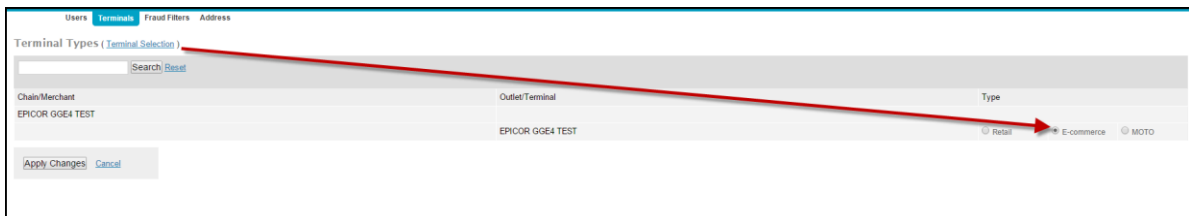
To change the terminal type select the **Administration** tab and choose **Terminals**. Click on the **Terminal Types** hyperlink.



The screenshot shows the Epicor Administration - Terminals page. The "Administration" tab is selected in the top navigation bar. The "Terminals" sub-tab is also selected. A red arrow points to the "Terminal Types" link. Below the navigation bar, there is a search bar and a table with the following columns: Merchant, Terminal, Status, Status Changed, Currency, Virtual Terminal, and Gateway.

Merchant	Terminal	Status	Status Changed	Currency	Virtual Terminal	Gateway
EPICOR GGE4 TEST	EPICOR GGE4 TEST	Active	-	USD	001	CT7616-01

Click the **E-commerce** radio button as shown below and then click **Apply Changes**



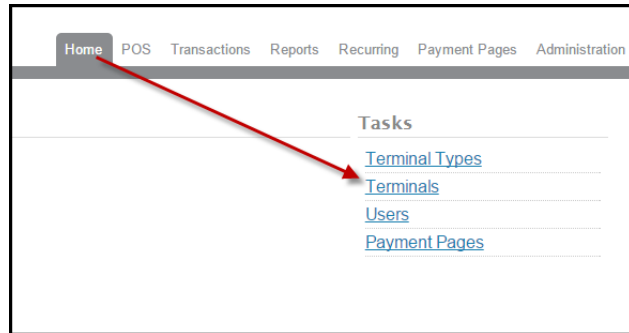
The screenshot shows the Epicor Administration - Terminal Types page. The "Terminal Types" sub-tab is selected. A red arrow points to the "E-commerce" radio button. Below the navigation bar, there is a search bar and a table with the following columns: Chain/Merchant, Outlet/Terminal, and Type.

Chain/Merchant	Outlet/Terminal	Type
EPICOR GGE4 TEST	EPICOR GGE4 TEST	<input type="radio"/> Retail <input checked="" type="radio"/> E-commerce <input type="radio"/> MOTO

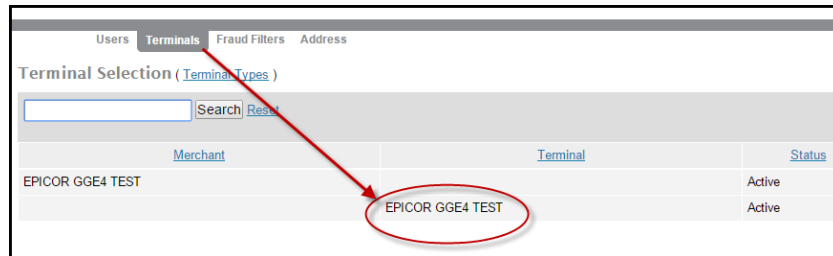
Using CVV2 validation

Follow the steps below if you wish to utilize CVV validation on your payment page.

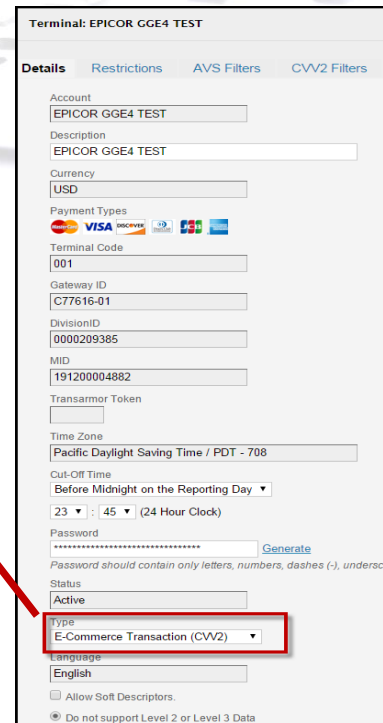
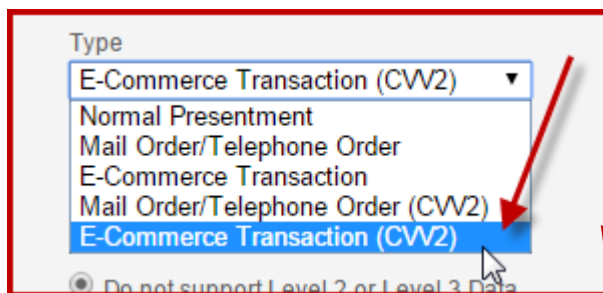
From the **Home** page click on the **Terminals** link.



Click on the terminal name in the **Terminal** column as shown below.

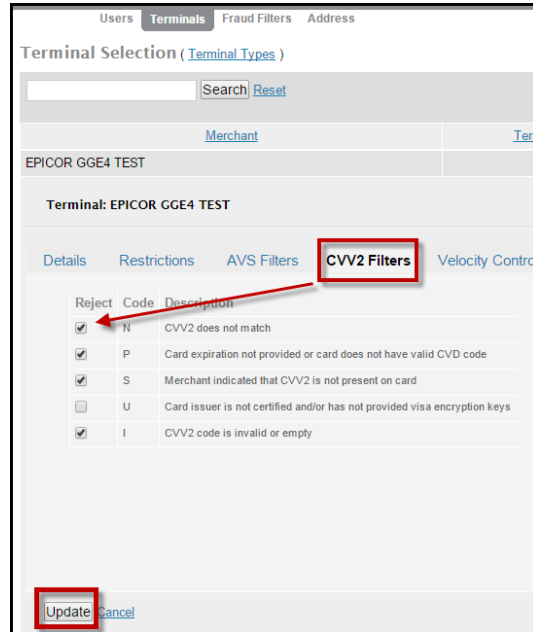


Scroll down to the **Type** field and from the dropdown choose **E-Commerce Transaction (CVV2)**.



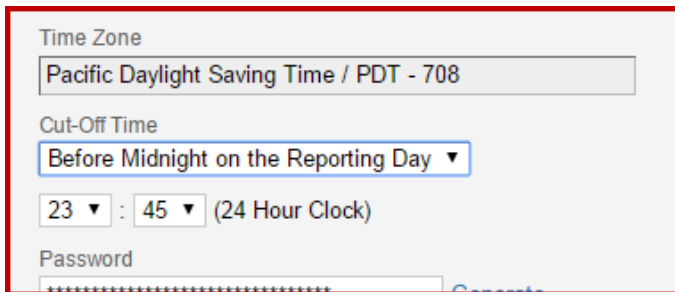
Set CVV2 Filters

Click the **CVV2 Filters** link at the top of the page. Indicate which description should be rejected by checking the box in the **Reject** column. Click the **Update** button at the bottom of the page after all selections have been made.



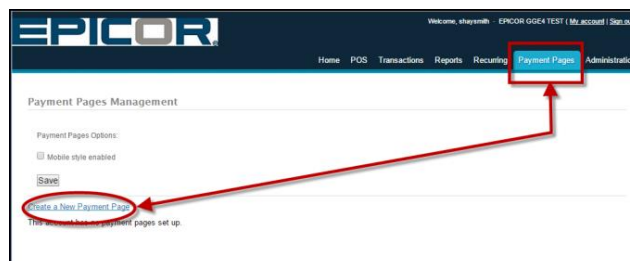
Set Terminal Settlement Time

On the same **Terminal Details** screen described in the **Using CVV2 Validation** section. Locate the **Time Zone** field and set for your location. In the **Cut-Off Time** field use the dropdown to select **Before Midnight on the Reporting Day**. Use the dropdowns in the **24 Hour Clock** field to choose your settlement time. The time should be set to 23:30 or earlier, otherwise bankcards may take longer to fund.



Create a Payment Page for iNet

1. Select **Payment Pages** and the click **Create a New Payment Page**.



2. **General Settings-Provide Payment Page Title, Return to Your Site URL, Notification Email as shown below.** An exact URL does not have to be provided; this could be your iNet landing page, or department list.

3. **Payment Types Settings- Check Enable Credit Card Payments. If desired check Make CVV2 Input Mandatory.**

Note that **CVV2 Options** will not display unless you have chosen terminal type **E-Commerce Transaction (CVV2)** as described in the section above.

If you have multiple locations, or terminals you must choose the appropriate terminal from the drop down in the **Using Terminal** field.

4. Receipt Page Settings

- I. Choose **Automatic Linking to the receipt page using HTTP Post method (AUTO-POST)**
- II. Enter Receipt Link Text, for example: **View Receipt**
- III. Enter Receipt Link URL <http://www.example.com/inet/storefront/paypage.php>

a. **CRITICAL NOTES!**

- i. Replace *www.example.com* with your iNet hostname - website URL.
- ii. **YOU MUST PLACE “/inet/storefront/paypage.php”** after your URL or else:
 1. The online shopper will not return to your website confirmation page
 2. No order will be sent to Eagle but the shopper will be charged
- iii. If iNet site is running as a secure site you may need to change “http://” to “https://”

- IV. Enter a title for the **Reference Number** field so the iNet reference number will appear on the payment page.

The screenshot shows the 'New Payment Page: WSP-EPICO-dKDziABCMQ' configuration page. The left sidebar lists navigation options: 1. General, 2. Payment Types, 3. Pay Now/Donate Now, 4. Receipt Page (highlighted), 5. Receipt Emails, 6. Recurring, 7. Customize Form, 8. Appearance, and 9. Security. The main content area is titled 'Receipt Page Setup' and includes a description: 'In this section, the settings for Relay Response, Silent Post, and Receipt Link are set. These settings dictate receipt display and how transactional data is transmitted back to the merchant.' Below this is the 'Receipt Page Settings' section, which includes a 'Return Link Method (for receipt page)' with several radio button options: 'Automatic linking to the receipt page including result parameters using HTTP POST method (AUTO-POST)' (selected), 'Link to the receipt page including result parameters using HTTP POST method (POST)', 'Automatic linking to the receipt page including result parameters using HTTP GET method (AUTO-GET)', 'Link to the receipt page including result parameters using HTTP GET method (GET)', 'Link to the receipt page (LINK)', and 'An HTTP Redirection to the receipt page (REDI)'. There is also a checkbox for 'Allow Relay Response' under 'Authorize.Net Protocol - Relay Response Settings'. The 'Receipt Link Text' is 'View Receipt', the 'Receipt Link URL' is 'http://www.example.com/inet/storefront/p', the 'Reference Number Title (x_invoice_num)' is 'Reference Number', and the 'Customer Reference Title (x_po_num)' is blank.

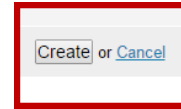
5. Choose **Receipt Emails** – check the box if you wish to **Send a payment confirmation email to customers**. Enter your “Reply To” email address. Note: iNet will send a confirmation email, checking this box may result in sending 2 emails to your customer.

The screenshot shows the 'Payment Page Settings for WSP-EPICO-h7QD3ABDBg' configuration page. The left sidebar lists navigation options: 1. General, 2. Payment Types, 3. Pay Now/Donate Now, 4. Receipt Page, 5. Receipt Emails (highlighted with a red box), 6. Recurring, 7. Customize Form, 8. Appearance, 9. Security, and 10. Hash Calculator. The main content area is titled 'Email Setup' and includes a description: 'This section covers the email confirmation settings for the merchant and customer. If the “Send a payment confirmation email to customers” box is checked, the receipt header and footer text (optional) can also be specified below.' Below this is the 'Email Enabled' section with a checked checkbox for 'Send a payment confirmation email to customers'. The 'Email Addresses' section includes a '“Reply-To:” Email' field with the value 'email@example.com'. Below this are two text areas for 'Receipt Email Header/Footer' labeled 'Receipt Email Header' and 'Receipt Email Footer'. At the bottom, there are navigation links: '< Previous' and 'Next >'. Red arrows point from the '5. Receipt Emails' menu item to the 'Email Enabled' checkbox and from the '“Reply-To:” Email' label to its input field.

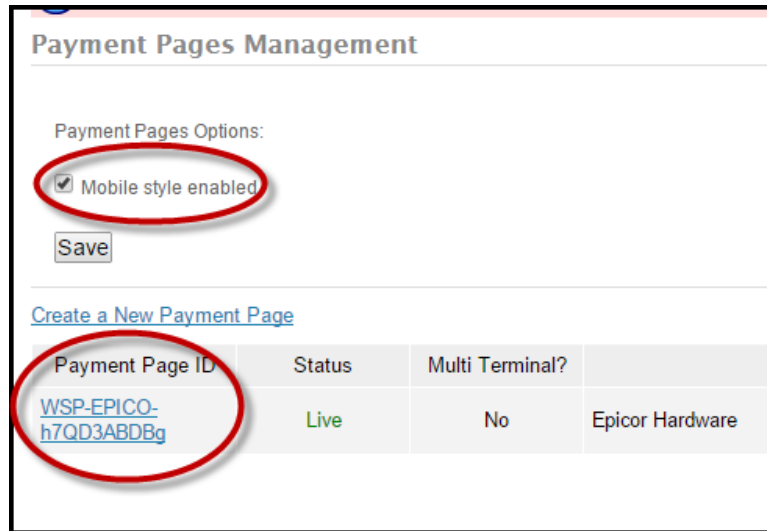
- Click **Customize Form**, and drag and drop the fields you want displayed on the payment page. We recommend adding **Reference/Order #** which will display the reference number from iNet.

- Click **Security** and ensure encryption type is set to **MD5**. Make note of the **Transaction Key** (Generate a new one if needed) Make note of the **Response Key** (Generate a new one if needed) – we recommend using copy/paste for these values. It is important that they not be mixed up. Both values will be entered in the iNet setup windows.

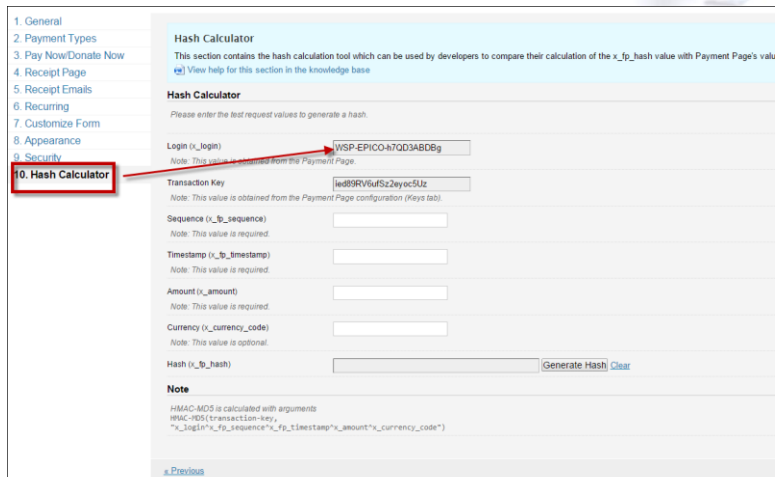
8. Click the **Create** button in the lower right hand side of the window. The **Payment Pages Management** window displays indicating that a Payment Page has been created. Check the **Mobile style enabled** box. Allows your iNet shopper to see mobile optimized payment page.



- a. **NOTE - THIS IS NOT THE SAME AS A MOBILE PAYMENT PAGE FOR TABLET POS.** See the Mobile Payment Page setup section of this document for proper Payeezy configuration with Tablet POS.



9. Click on the hyperlink in the **Payment Page ID** column (shown above) and the Payment Page Settings will display with an additional selection “**10. Hash Calculator**”. Click **Hash Calculator** and make note of the Login (x_login)



10. Follow the **iNet Setup** instructions in section 5 to complete setup on your iNet application.

5 iNet Payment setup

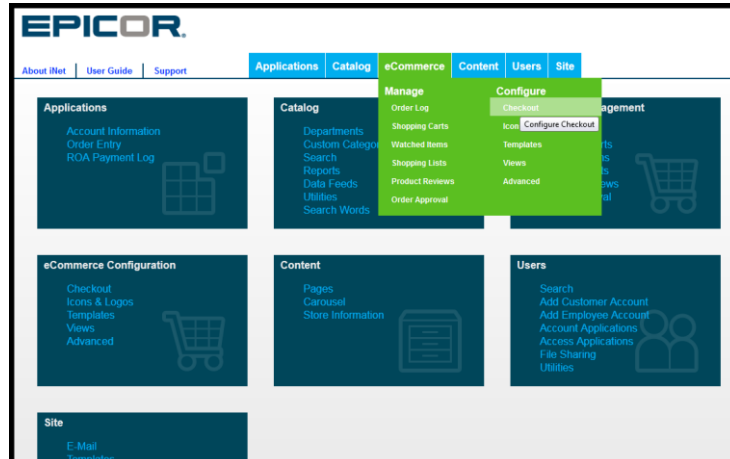
After establishing a Payment Page in Payeezy you may begin setting up your iNet to accept bankcard payments with the “Epicor Payment Exchange – Net” in iNet Gateway setup.

NOTE – Be sure to use “Epicor Payment Exchange – Net” with this “Payeezy” setup!

In iNet, log in as **administrator** and go to eCommerce ->Configure -> Checkout -> Payment Gateway Configuration.

Locate the “Epicor Payment Exchange – Net” payment gateway.

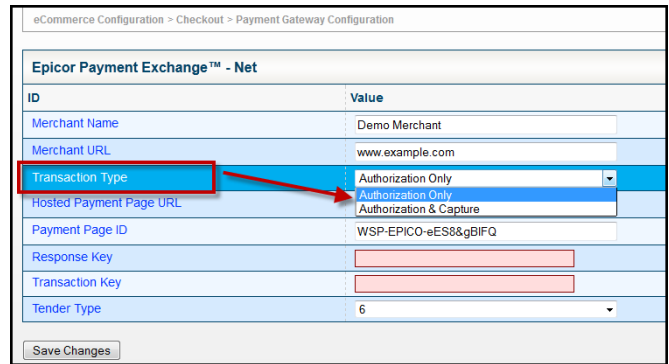
Click edit button to configure.



Payment Gateway Configuration						
Click the edit icon below to configure a payment gateway for your site.						
Use the checkboxes for already configured gateways to set where they are available.						
Availability						
Actions	Description	Configured	Tender	Shopping Cart	AR Payments	
	Authorize.NET - (SIM)	Yes	5	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	Authorize.NET - (SIM) eCheck.Net/ACH	Yes	N/A	<input type="checkbox"/>	<input type="checkbox"/>	
	Epicor Payment Exchange™	No		<input type="checkbox"/>	<input type="checkbox"/>	
	Epicor Payment Exchange™ - Net	No		<input type="checkbox"/>	<input type="checkbox"/>	
	MiraPay - Hosted Paypage	No		<input type="checkbox"/>	<input type="checkbox"/>	
	Moneris - Hosted Paypage	No		<input type="checkbox"/>	<input type="checkbox"/>	
	PayPal - Website Payments Standard	No		<input type="checkbox"/>	<input type="checkbox"/>	

Set **Merchant Name**, **Merchant URL** with your iNet business name and iNet URL.

Transaction Type determines whether the bankcard will be charged immediately when the customer places the order or if only an authorization code will be obtained. There are 2 selections available from the dropdown; **Authorization & Capture** and **Authorization Only**.



ID	Value
Merchant Name	Demo Merchant
Merchant URL	www.example.com
Transaction Type	Authorization Only
Hosted Payment Page URL	
Payment Page ID	WSP-EPICO-eES8&gBIFQ
Response Key	
Transaction Key	
Tender Type	6

Select **Authorization & Capture** if you wish to charge the customer's card when the order is placed. Choose **Authorization Only**, if you wish to charge the customer after the shipment is complete. **Authorization Only** requires that you manually complete or modify each transaction in the Payeezy Gateway's **Transaction Tab** (instructions are provided in Section 6 of this guide).

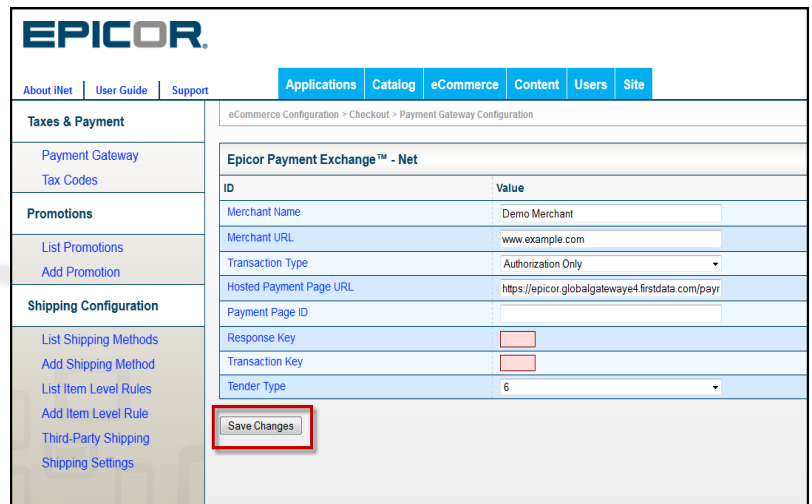
Set **Hosted Payment Page URL** to: <https://epicor.globalgatewaye4.firstdata.com/payment>

Set **Payment Page ID** to the payment page ID from Payeezy Gateway (appears as x_login on the **Hash Calculator** tab).

Set **Response Key & Transaction Key** to the values from the Payeezy Gateway **Security** tab.

Note: Use care when copying/pasting values that you do NOT include spaces.

Check your entries and then click **Save Changes**.



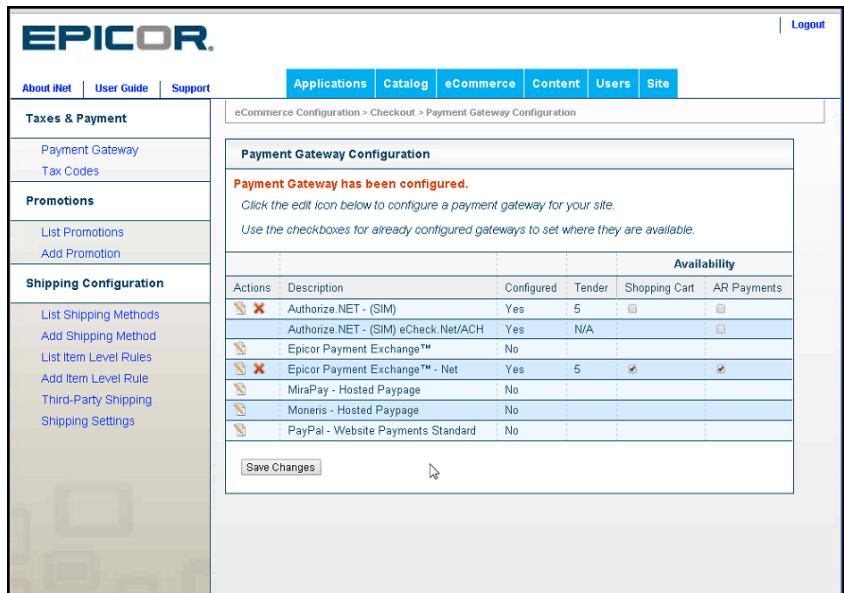
ID	Value
Merchant Name	Demo Merchant
Merchant URL	www.example.com
Transaction Type	Authorization Only
Hosted Payment Page URL	https://epicor.globalgatewaye4.firstdata.com/payr
Payment Page ID	
Response Key	
Transaction Key	
Tender Type	6

On the **Payment Gateway Configuration** page, shown below, you can now select where this gateway will be used.

Check the **Shopping Cart** and/or **AR Payments** checkboxes on the **Epicor Payment Exchange – NET** line to enable the gateway for those payments.

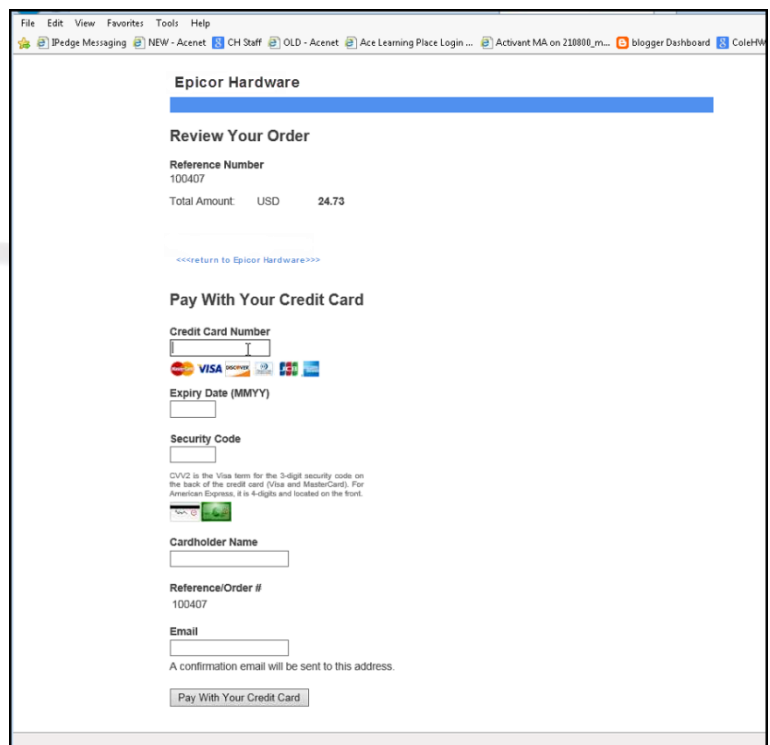
If you had a prior gateway configured, you will need to uncheck it to remove it from your site.

Please note, iNet will allow you to have multiple payment gateways in use (For example PayPal combined with Epicor Payment Exchange)



After completing your setup you should enter a live order through iNet to test and verify that the transaction appears in the Payeezy Gateway transaction tab.

TIP--*If your first transaction is not successful check that no spaces were included when copying and pasting the Payment Page ID, Response Key or Transaction Key.*



6 Using Payeezy Gateway to manage iNet Payments

Sections 1 through 3 apply to iNet users as well as Retail POS. In addition to the functions described in those sections you may need to use other features to manage iNet payments. Some of those features are described in the sections below.

Issue a credit on an existing iNet payment

1. Locate the existing transaction. Select the **Transactions** tab. Enter a name or reference number in the reference field. Specify the date range.

Actions	Card Holder	Card	Amount	Card Number	Expiry	Transaction	Status	Time	Auth.	Ref Num
	Richard A Bishop	VISA	2.01 USD	#####4678	01/15	Tagged Purchase	✓	2015/04/14 07:44:14	02451C	0414151
	Richard A Bishop	VISA	1.02 USD	#####4678	01/16	Tagged Void	✓	2015/04/13 14:22:32	02150C	04131504

2. Locate and verify the desired transaction.

Actions	Card Holder	Card	Amount	Card Number	Expiry	Transaction	Status
	Richard A Bishop	VISA	2.01 USD	#####4678	01/15	Tagged Purchase	✓
	Richard A Bishop	VISA	1.02 USD	#####4678	01/16	Tagged Void	✓
	Richard A Bishop	VISA	1.02 USD	#####4678	01/16	Purchase	✓

3. To issue a Refund or Credit select the **R** button in the **Actions** column. Enter the amount of the refund, up to the entire sale amount, and click **Submit**.

Refund Transaction

Transaction Tag: 802807928

Refund Amount: 2.01 USD
(Maximum Refund USD 2.01)

Reference Number: 0414151

Customer Reference: A041415

Reference Number 3: [Empty]

Fraud Suspected

Submit Transaction or Cancel

Add charges on an existing iNet payment

1. Locate the existing transaction. Select the **Transactions** tab. Enter a name or reference number in the reference field. Specify the date range.

EPICOR

Home PO Transactions Report

Basic search Advanced search Preferences

Search transactions

Search
Bishop
(Card Holder, Reference)

Date
Custom 2015/04/10 00:00 to 2015/04/15 23:59

Merchant Account
EPICOR GGE4 TEST

Terminal
EPICOR GGE4 TEST

Search

« Back 1 Day Forward 1 Day »

Print Download CSV Number of Transactions: 11

Actions	Card Holder	Card	Amount	Card Number	Expiry	Transaction	Status	Time	Auth.	Ref Num
	Richard A Bishop	VISA	2.01 USD	#####4678	01/15	Tagged Purchase	✓	2015/04/14 07:44:14	02451C	0414151 A041415
	Richard A Bishop	VISA	1.02 USD	#####4678	01/16	Tagged Void	✓	2015/04/13 14:22:32	02150C	04131504 d041315

2. Locate and verify the desired transaction.

« Back 1 Day Forward 1 Day »

Print Download CSV Number of Transactions: 11

Actions	Card Holder	Card	Amount	Card Number	Expiry	Transaction	Status
	Richard A Bishop	VISA	2.01 USD	#####4678	01/15	Tagged Purchase	✓
	Richard A Bishop	VISA	1.02 USD	#####4678	01/16	Tagged Void	✓
	Richard A Bishop	VISA	1.02 USD	#####4678	01/16	Purchase	✓

3. Select the **N** button. Enter the additional amount to be charged in the **New Amount** field. Note – If the CVV2 code is known enter it in the **Card Verification Data** field, otherwise select **Disregard CVD** from the dropdown. Click **Submit Transaction**.

Print Download CSV

Actions Card Holder Card

New Transaction

Transaction Type
Purchase

New Amount
2.01 USD

Credit Card Number
#####4678

Expiry Date
01 2015

Optional Fields

Reference Number
0414151

Customer Reference
A041415

Reference Number 3

AVS
18277 - ... 80634

Country
United States

Card Verification Data
Disregard CVD

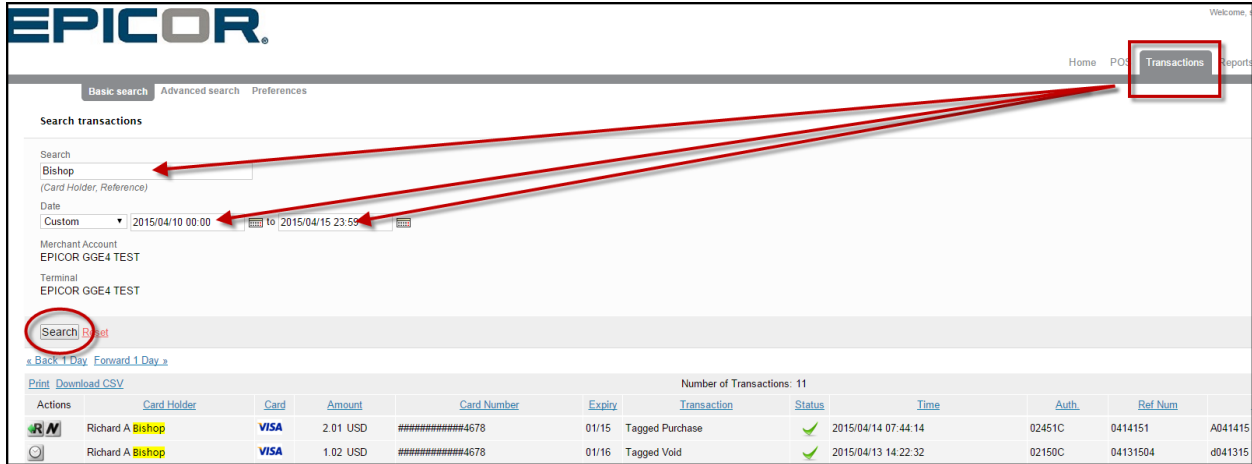
Override Terminal Type
MOTO - Single Transaction mail/telephone order

Submit Transaction or Cancel

Void an iNet Payment

A payment may be Voided only on the same day it is posted, otherwise it must be Refunded.

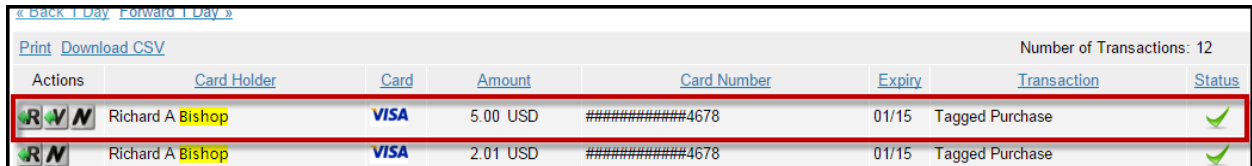
1. Locate the existing transaction. Select the **Transactions** tab. Enter a name or reference number in the reference field. Specify the date range.



The screenshot shows the EPICOR iNet interface. The 'Transactions' tab is selected and highlighted with a red box. Red arrows point from this tab to the search fields: the search term 'Bishop', the date range '2015/04/10 00:00' to '2015/04/15 23:59', and the 'Search' button, which is also circled in red. Below the search fields, a table displays transaction results.

Actions	Card Holder	Card	Amount	Card Number	Expiry	Transaction	Status	Time	Auth.	Ref Num	
	Richard A Bishop	VISA	2.01 USD	#####4678	01/15	Tagged Purchase	✓	2015/04/14 07:44:14	02451C	0414151	A041415
	Richard A Bishop	VISA	1.02 USD	#####4678	01/16	Tagged Void	✓	2015/04/13 14:22:32	02150C	04131504	d041315

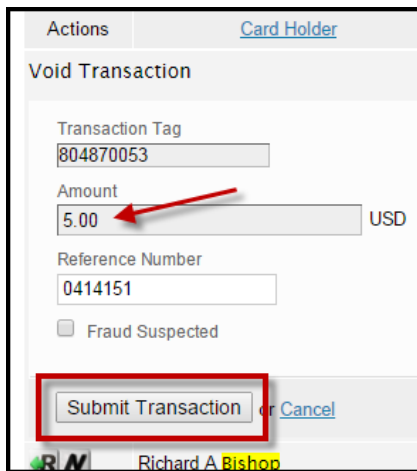
2. Locate and verify the desired transaction.



This is a close-up of the transaction table from the previous screenshot. The first row is highlighted with a red border. The 'V' button in the 'Actions' column is also highlighted with a red circle.

Actions	Card Holder	Card	Amount	Card Number	Expiry	Transaction	Status
	Richard A Bishop	VISA	5.00 USD	#####4678	01/15	Tagged Purchase	✓
	Richard A Bishop	VISA	2.01 USD	#####4678	01/15	Tagged Purchase	✓

3. Select the **V** button. Verify the amount being voided, and then click **Submit Transaction**.



The screenshot shows the 'Void Transaction' form. The 'Amount' field is set to '5.00' and is highlighted with a red arrow. The 'Submit Transaction' button is highlighted with a red box. The 'Reference Number' field contains '0414151'.

Transaction Tag: 804870053
Amount: 5.00 USD
Reference Number: 0414151
 Fraud Suspected
Submit Transaction or [Cancel](#)

Complete an "Authorization Only" Transaction

If the **Transaction Type** field in your iNet Payment Gateway Configuration page is set to **Authorization Only**, you must return to the Payeezy Gateway at a later date and complete each transaction in order to receive funding.

eCommerce Configuration > Checkout > Payment Gateway Configuration

Epicor Payment Exchange™ - Net

ID	Value
Merchant Name	Demo Merchant
Merchant URL	www.example.com
Transaction Type	Authorization Only
Hosted Payment Page URL	Authorization Only Authorization & Capture
Payment Page ID	WSP-EPICO-eES8&gBIFQ
Response Key	
Transaction Key	
Tender Type	6

Save Changes

Locate the transaction on the **Transactions** tab in the Payeezy Gateway, click the **C** button in the **Actions** column.

Search: A1234 (Card Holder, Reference)

Date: Custom 2015/07/13 00:00 to 2015/07/14 23:59

Merchant Account: EPICOR GGE4 TEST

Terminal: EPICOR GGE4 TEST

Search Reset

Back 1 Day Forward 1 Day

Print Download CSV

Actions	Card Holder	Card	Amount	Card Number	Expiry	Transaction	Status
	Rick Bishop	VISA	1.00 USD	*****9083	01/17	Pre-Authorization	20

Print Download CSV

Number of Transactions: 1

Verify or modify the **Completion Amount** and **Reference Number** and select **Submit Transaction**.

In a similar manner, a Pre-Authorized transaction can also be voided by choosing the **V** button from the **Actions** column and clicking **Submit Transaction**.

The button with the pencil icon allows you to modify the **Reference Number** and **Customer Reference** fields.

Button **N** in the **Actions** column allows you to begin a new transaction with the existing customer and bankcard information.

Print Download CSV

Actions Card Holder Ca

Complete Pre-authorized Transaction

Transaction Tag: 970797440

Completion Amount: 1.00 USD (Maximum amount USD 2.00)

Reference Number: 1234

Submit Transaction Cancel

7 Payment Page Setup for Tablet POS users

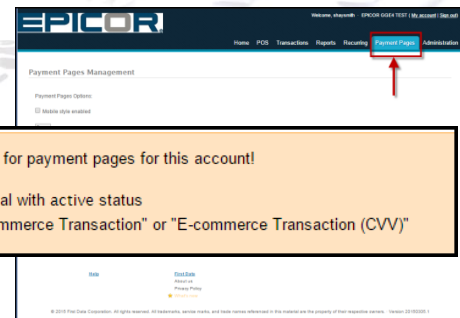
Notes Before you begin!

- This Page may be used for Tablet POS as it is used to process hand typed payments
- You must have a Mobile Merchant ID (MID) and Terminal ID (TID) assigned from the Epicor Payment Exchange operations team. If you do not have a Mobile MID/TID or don't know what your MID/TID is then please contact the Payment Operations Team at 1-800-322-3077
 - The Mobile MID & TID are unique to your business. You may not re-purpose a MID/TID that was designated to an eCommerce storefront. While technically this may be possible it is not an appropriate business practice. Speak with your Epicor Payment Exchange rep for more information regarding this topic.

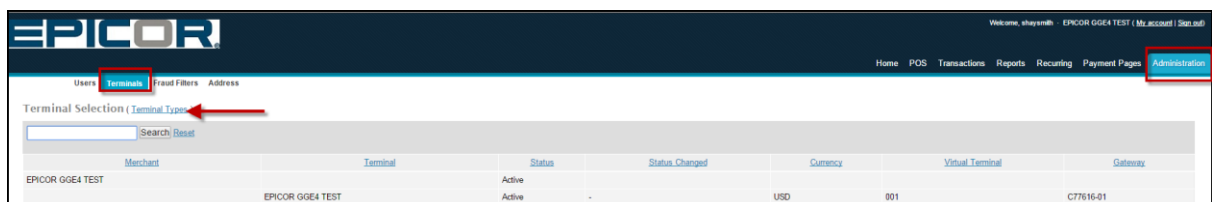
Follow the steps in section 1 to log into your Payeezy Gateway account and **be sure to select your Mobile Merchant ID** if multiple are listed. From the **Home** page you may click on **Payment Pages** to begin. However, you may wish to follow the preliminary steps outlined below to properly configure your payment page.

Set terminal type to E-Commerce (This is correct even for Mobile TID)

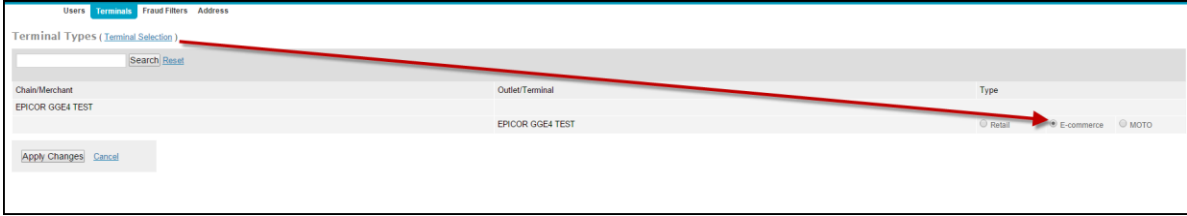
Your terminal type must be set to "E-Commerce". If you see a message as shown here you must change the terminal type.



To change the terminal type select the **Administration** tab and choose **Terminals**. Click on the **Terminal Types** hyperlink.



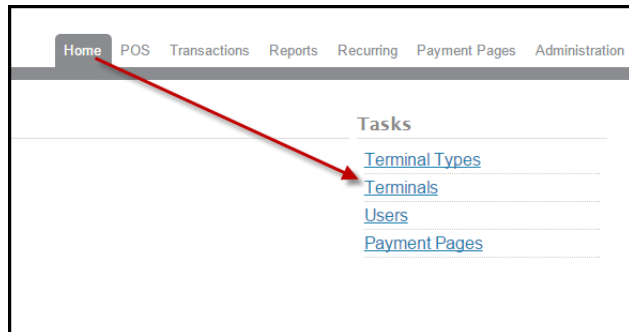
Click the **E-commerce** radio button as shown below and then click **Apply Changes**



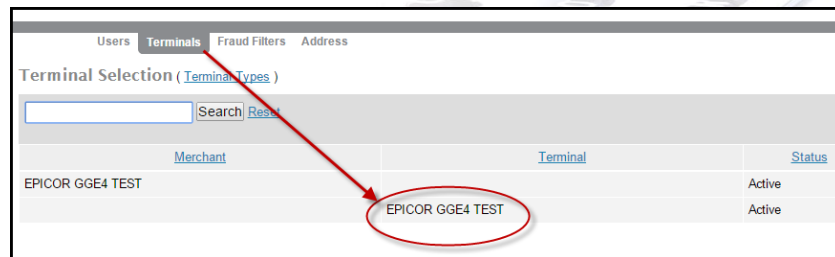
Using CVV2 validation

Follow the steps below if you wish to utilize CVV validation on your payment page.

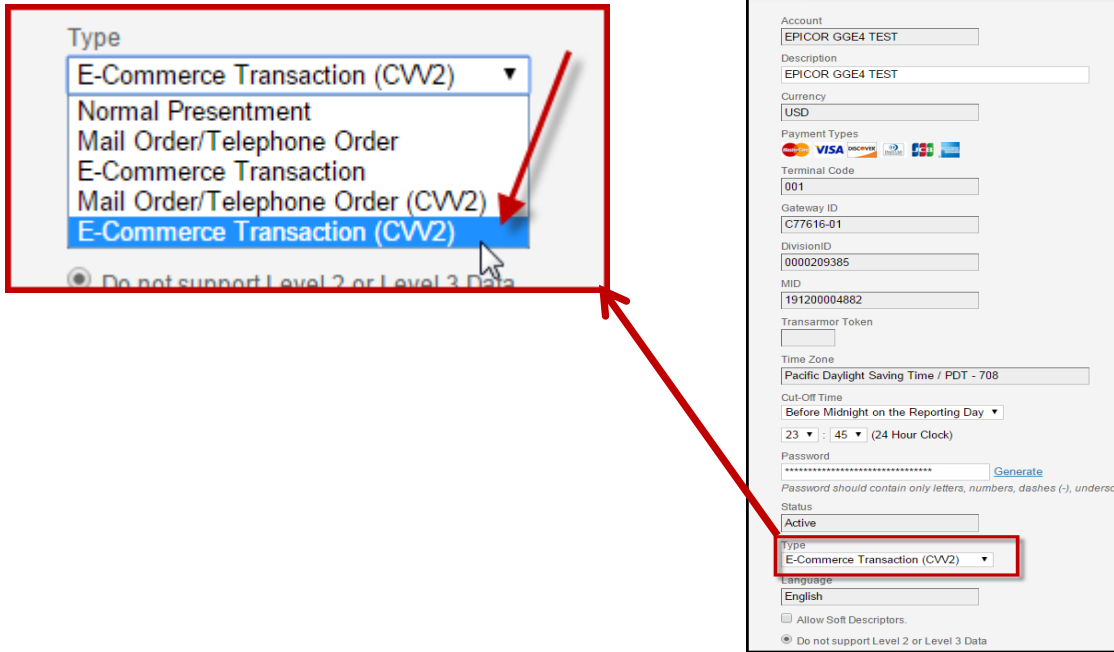
From the **Home** page click on the **Terminals** link.



Click on the terminal name in the **Terminal** column as shown to the right.

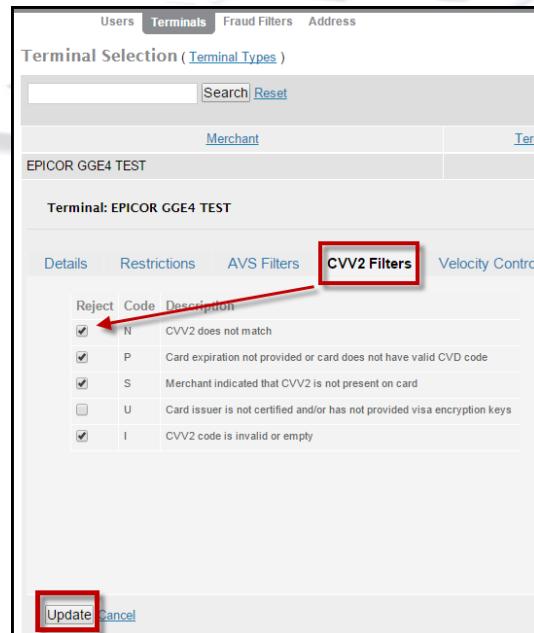


Scroll down to the **Type** field and from the dropdown choose **E-Commerce Transaction (CVV2)**.



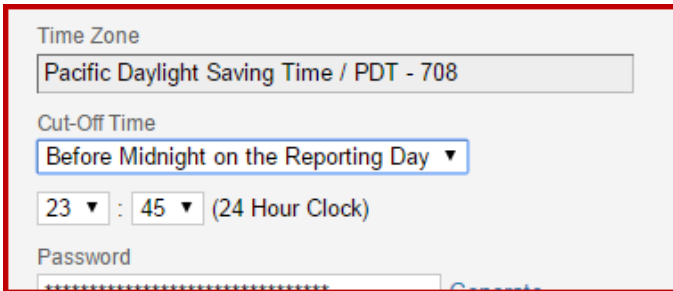
Set CVV2 Filters

Click the **CVV2 Filters** link at the top of the page. Indicate which description should be rejected by checking the box in the **Reject** column. Click the **Update** button at the bottom of the page after all selections have been made.



Set Terminal Settlement Time

On the same **Terminal Details** screen described in the **Using CVV2 Validation** section. Locate the **Time Zone** field and set for your location. In the **Cut-Off Time** field use the dropdown to select **Before Midnight on the Reporting Day**. Use the dropdowns in the **24 Hour Clock** field to choose your settlement time. The time should be set to 23:30 or earlier, otherwise bankcards may take longer to fund.



The screenshot shows a form with the following fields:

- Time Zone:** A text input field containing "Pacific Daylight Saving Time / PDT - 708".
- Cut-Off Time:** A dropdown menu with "Before Midnight on the Reporting Day" selected.
- 24 Hour Clock:** Two dropdown menus showing "23" and "45", followed by the text "(24 Hour Clock)".
- Password:** A text input field with a masked password "XXXXXXXXXXXX" and a "Create" button.



Create a Mobile App Payment Page for Tablet POS

1. Select **Payment Pages** and then click [Create a New Payment Page](#).



2. **General Settings**—Provide **Payment Page Title** & **Notification Email** as shown below. You can leave the return URL blank.

1. General	General Page Setup
2. Payment Types	Enter the information below to create your Payment Page. Additional customization can be done by selecting the menu options on the left. View help for this section in the knowledge base
3. Pay Now/Donate Now	General Settings
4. Receipt Page	Payment Page Title <input type="text" value="Epicor Mobile App Payment Page"/> <i>Example: Company Name</i>
5. Receipt Emails	"Return to Your Site" URL <input type="text"/> <i>Example: http://mydomain.com</i>
6. Recurring	Maximum Number of Payment Attempts <input type="text" value="3"/> <input type="button" value="v"/> <i>Customers will be prevented from submitting payment information after this number of payment attempts; Relay Response / Silent Post will be invoked if configured.</i>
7. Customize Form	Notification Email <input type="text" value="myemail@mydomain.com"/> <i>This email address receives</i> <ul style="list-style-type: none">▪ Copies of payment confirmations emails sent to the Customer▪ Notifications of and error diagnosis for failed redirect-submissions (Example: shipping@yoursite.com)
8. Appearance	Level 3 Processing <input type="checkbox"/> Enable Level 3 Processing <i>Level 3 information will be sent for Settlement.</i>
9. Security	Next »

3. **Payment Types Settings- Check Enable Credit Card Payments.** If desired check **Make CVV2 Input Mandatory.**
- I. Note that **CVV2 Options** will not display unless you have chosen terminal type **E-Commerce Transaction (CVV2)** as described in the section above.
 - II. If you have multiple locations, or terminals you must choose the appropriate terminal from the drop down in the **Using Terminal** field.

Payment Page Settings for WSP-EPICO-h7QD3ABDBg

- 1. General
- 2. Payment Types**
- 3. Pay Now/Donate Now
- 4. Receipt Page
- 5. Receipt Emails
- 6. Recurring
- 7. Customize Form
- 8. Appearance
- 9. Security
- 10. Hash Calculator

Payment Types Setup
Select customer payment options including credit card and/or PayPal.
Demo or Test Terminals can also be set in this section.
The 3-D Secure Settings refer to Verified by Visa and MasterCard SecureCode. Offering this feature requires production-level 3-D Secure
[View help for this section in the knowledge base](#)

Default Currency
Default Currency is USD (No other default currency is available for this account)

Processing Mode
Live
This is the only mode available as there are no other terminals available

Terminal Assignment
 Use This Payment Page For All Terminals

Credit Card Payments
 Enable Credit Card Payments

Test Processing
There is no terminal in "test" mode configured for this account and the selected currency.

Live Processing

Merchant	EPICOR GGE4 TEST
Using Terminal	EPICOR GGE4 TEST

CVV2 Options
 Make CVV2 Input Mandatory

3-D Secure Settings (Verified by VISA / MasterCard SecureCode)
VBV is not enabled for the selected terminal.

4. Receipt Page Settings

- I. Choose **Automatic Linking to the receipt page using HTTP Post method (AUTO-POST)**
- II. Enter Receipt Link URL exactly like this <http://www.epicor.com>

NOTE DO NOT FILL IN ANY OTHER FIELDS OR APP WILL NOT WORK

1. General
2. Payment Types
3. Pay Now/Donate Now
4. Receipt Page
5. Receipt Emails
6. Recurring
7. Customize Form
8. Appearance
9. Security
10. Hash Calculator

Receipt Page Setup

In this section, the settings for Relay Response, Silent Post, and Receipt Link are set. These settings dictate receipt display and how transactional data is transmitted back to the merchant.
[View help for this section in the knowledge base](#)

Receipt Page Settings

Return Link Method (for receipt page)

- Automatic linking to the receipt page including result parameters using HTTP POST method (AUTO-POST)
- Link to the receipt page including result parameters using HTTP POST method (POST)
- Automatic linking to the receipt page including result parameters using HTTP GET method (AUTO-GET)
- Link to the receipt page including result parameters using HTTP GET method (GET)
- Link to the receipt page (LINK)
- An HTTP Redirection to the receipt page (REDI)

The type of link made back to merchant's website

Receipt Link Text

Receipt Link URL

Reference Number Title (x_invoice_num)

Leave blank if you don't want x_invoice_num to display on the payment page.

Customer Reference Title (x_po_num)

Leave blank if you don't want x_po_num to display on the payment page.

5. Choose **Receipt Emails** – check the box if you wish to **Send a payment confirmation email to customers**. Enter your “Reply To” email address and header/footer messages. Note: Tablet will send a confirmation email if chosen during checkout process

Payment Page Settings for WSP-EPICO-h7QD3ABDBg

1. General
2. Payment Types
3. Pay Now/Donate Now
4. Receipt Page
5. Receipt Emails
6. Recurring
7. Customize Form
8. Appearance
9. Security
10. Hash Calculator

Email Setup

This section covers the email confirmation settings for the merchant and customer.
If the “Send a payment confirmation email to customers” box is checked, the receipt header and footer text (optional) can also be specified below.
[View help for this section in the knowledge base](#)

Email Enabled

Send a payment confirmation email to customers

Email Addresses

“Reply-To” Email

This email address is used as the “Reply-To” address for payment confirmation emails that are sent to customers. (Example: order_inquiries@yoursite.com) Confirmation emails will use the following as the “From” address: noreply@gge4mailer.com

Receipt Email Header/Footer

Receipt Email Header

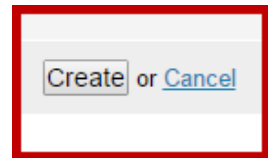
Receipt Email Footer

[« Previous](#) [Next »](#)

- Click **Customize Form**, and drag and drop the fields you want displayed on the payment page. We recommend adding **Zip Code** in addition to mandatory fields (Cardholder Name, Credit Card Number, Expiry Date (MMYY) and Security Code) as shown below:

- Click **Security** and ensure encryption type is set to **MD5**. Make note of the **Transaction Key** (Generate a new one if needed). Make note of the unique **Payment Page ID** as listed next to **“Payment Page Settings for XXX-YYYY-ZZZ”**. These values will be entered in the Mobile App setup for Hand Keyed Transactions.

8. Click the **Create** button in the lower right hand side of the window. The **Payment Pages Management** window displays indicating that a Payment Page has been created. Check the **Mobile style enabled** box to create a mobile payment page.



Payment Page created: **Your Payment Page**

Payment Pages Management

Payment Pages Options:

Mobile style enabled

[Create a New Payment Page](#)

Payment Page ID	Status	Multi Terminal?	Page Title			
iNet Payment Page	Live	No	Epicor Hardware iNet Example	Mobile Preview	Preview	Delete
Mobile Payment Page	Live	No	Epicor Mobile App Payment Page	Mobile Preview	Preview	Delete

9. Follow the **Tablet POS Manual Payment Setup** instructions in section 8 to complete setup for your mobile payment application hand keyed transactions.
 - I. Be sure to note your Gateway ID for this terminal. You can obtain this by clicking Administration > Terminals and selecting the mobile Terminal ID.

Home POS Transactions Reports Recurring Payment Pages Administration

Users **Terminals** Fraud Filters Address

Terminal Selection ([Terminal Types](#))

Merchant	Terminal	Status	Status Changed	Currency	Virtual Terminal	Gateway
EPICOR GGE4 TEST		Active				

Terminal: EPICOR GGE4 TEST

Details [Restrictions](#) [AVS Filters](#) [CVV2 Filters](#) [Velocity Controls](#) [PayPal](#) [3-D Secure](#) [API Access](#)

Account

Description

Currency

Payment Types

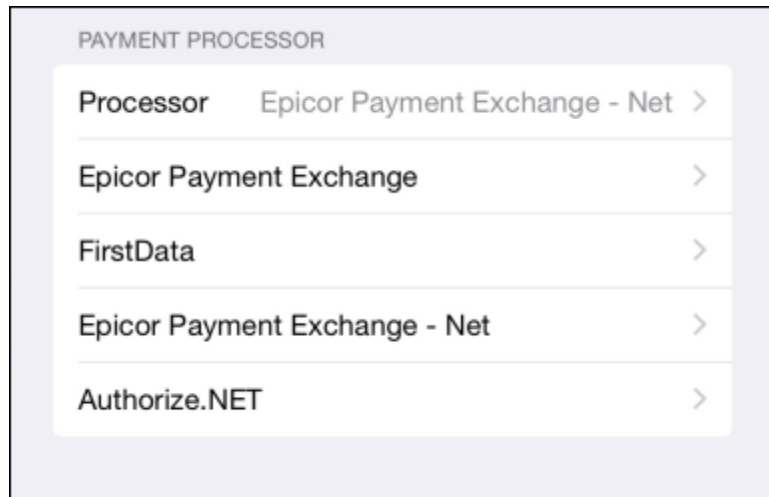
Terminal Code

Gateway ID

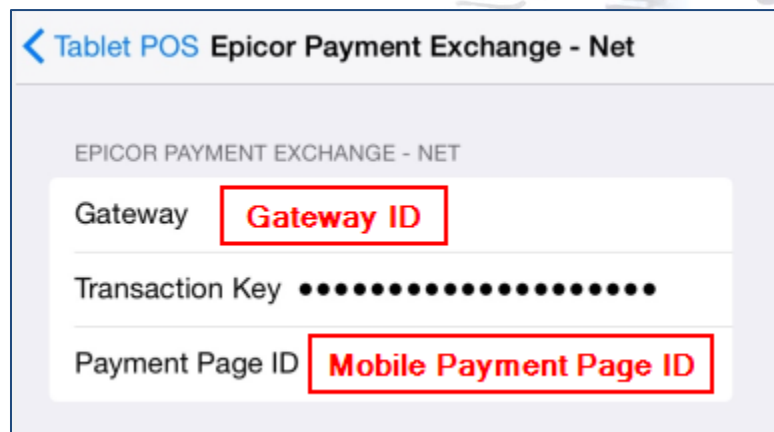
8 Tablet POS Manual Payment setup

After establishing a Payment Page in Payeezy for your mobile devices you may begin setting up your Tablet POS for manually entered credit cards for use with Epicor Payment exchange.

1. Go to your iPad Settings and select **Tablet POS**
2. Within the Tablet POS settings you will need to set your processor to **Epicor Payment Exchange – Net**.

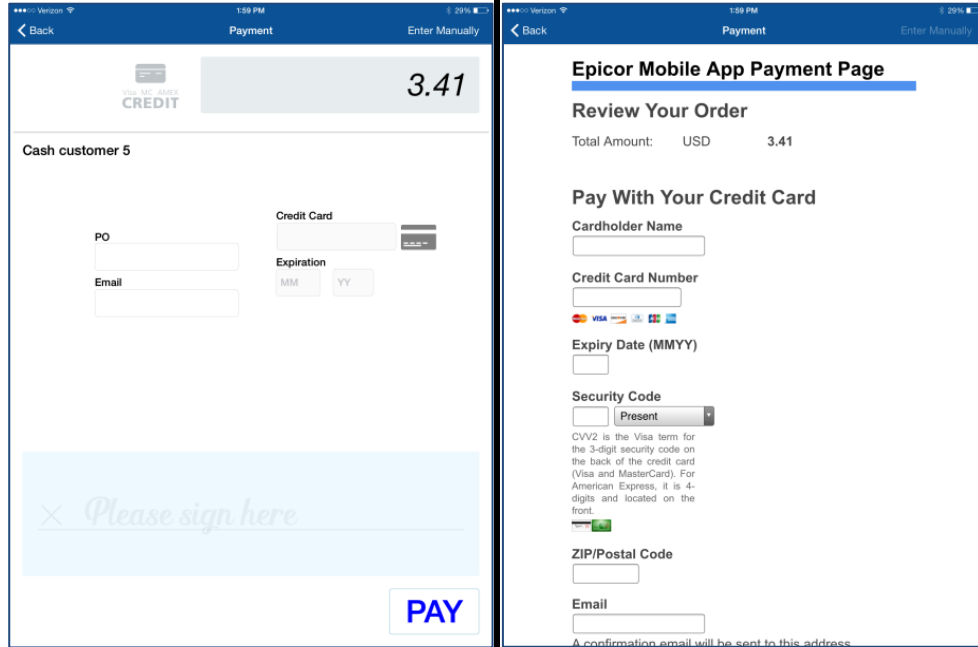


3. Within the Tablet POS settings you will need to set the credentials for Epicor Payment Exchange – Net. **Enter the Gateway ID, Transaction Key and Payment Page ID** for the “MANUAL” portion of Tablet POS Settings. (Note – We are only addressing the Manual Credentials within this setup document. Refer to the Tablet POS setup guide for configuration of the “SWIPE” portion.)



4. Setup is complete and you can now accept bankcard payments through manual entry within Tablet POS. To test you may post a transaction and select “Enter Manually” from the payment screen. A successful implementation will look like the following:

I. Tablet POS



i.

