Payeezy℠ Gateway

(Formerly GGe4)

Real Time Payment Manager

EPICOR

Payment Exchange™

Table of Contents

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

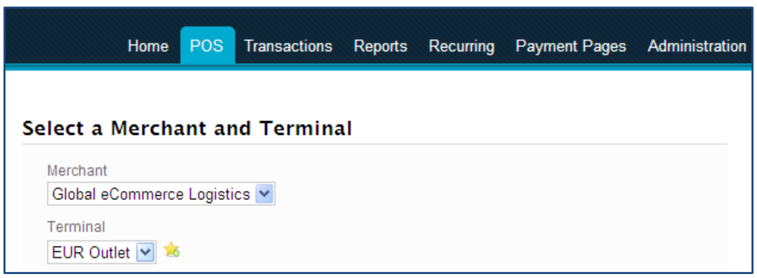
When you first login you will be prompted to change your password and answer security questions. Every 90 days you will be prompted to change your password. Your password must contain at least one number. Enter your current password under the user name and the new password. Type the new password again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

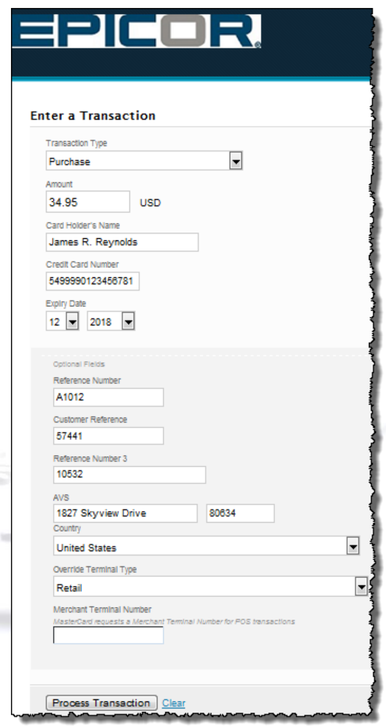
If you enter your password incorrectly more than 3 times you will be locked-out for 24 hours and unable to login unless your User ID is reset. If this happens please contact your Merchant Administrator.

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.

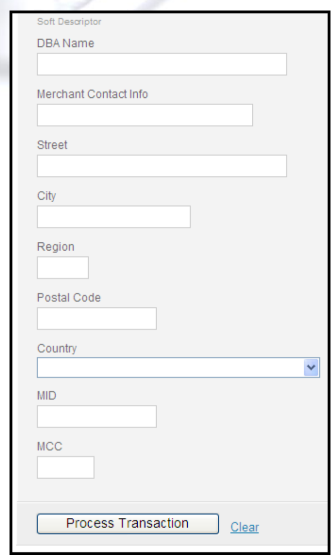
Enter the **Card Holder's Name** exactly as it appears on the card. Enter the **Credit Card Number** and the expiration date (**Expiry Date**) month and year.

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.

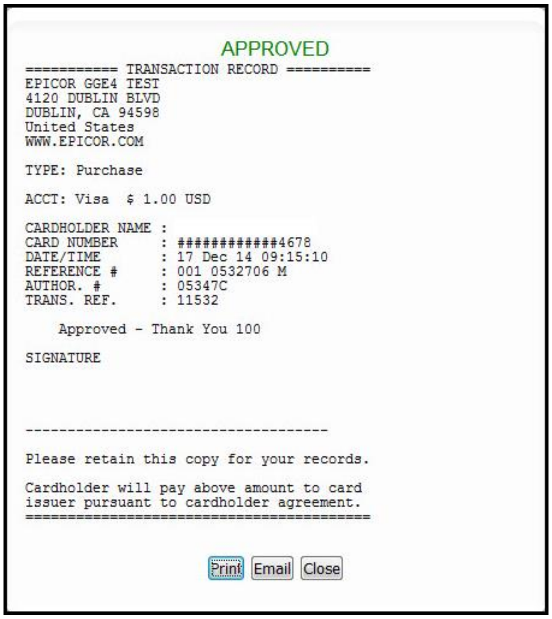
The **Override Terminal Type** field has a dropdown that allows you to choose a different terminal type.



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.



APPROVED

```
=========== TRANSACTION RECORD ==========
EPICOR GGE4 TEST
4120 DUBLIN BLVD
DUBLIN, CA 94598
United States
WWW.EPICOR.COM

TYPE: Purchase

ACCT: Visa  $ 1.00 USD

CARDHOLDER NAME :
CARD NUMBER     : ############4678
DATE/TIME       : 17 Dec 14 09:15:10
REFERENCE #     : 001 0532706 M
AUTHOR. #       : 05347C
TRANS. REF.     : 11532

    Approved - Thank You 100

SIGNATURE



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Please retain this copy for your records.

Cardholder will pay above amount to card
issuer pursuant to cardholder agreement.
=========================================
```
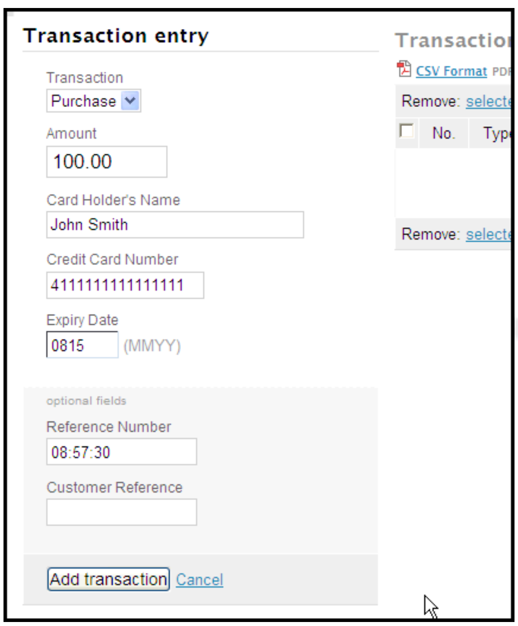
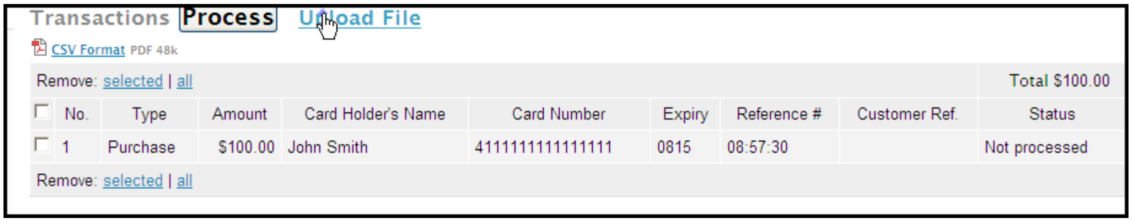

Print Email Close

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



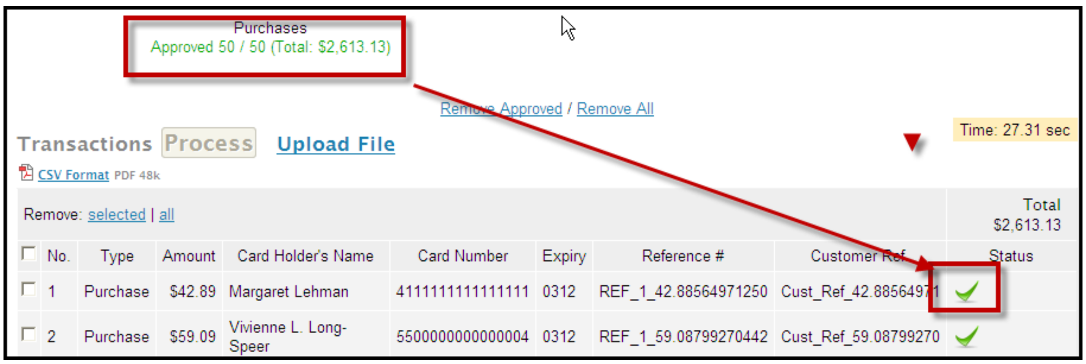
Select the **Transaction** type; enter the **Amount,** card information and references. Click **Add transactions**. The transaction will display to the right of the entry screen as shown below.



No.	Type	Amount	Card Holder's Name	Card Number	Expiry	Reference #	Customer Ref.	Status
1	Purchase	$100.00	John Smith	4111111111111111	0815	08:57:30		Not processed

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.



No.	Type	Amount	Card Holder's Name	Card Number	Expiry	Reference #	Customer Ref.	Status
1	Purchase	$42.89	Margaret Lehman	4111111111111111	0312	REF_1_42.88564971250	Cust_Ref_42.88564971	✓
2	Purchase	$59.09	Vivienne L. Long-Speer	5500000000000004	0312	REF_1_59.08799270442	Cust_Ref_59.08799270	✓

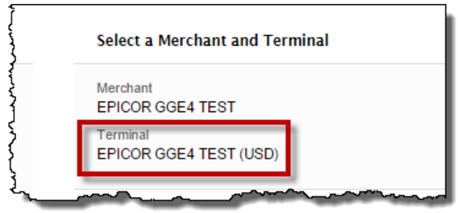
Next enter the authorization information (if required). Authorization Number is an alternative option to using 'Transactions' to do a Pre-Authorization Completion. You can only conduct a refund through POS if you have a pre-set refund level; otherwise refunds can be conducted more easily through Transactions.

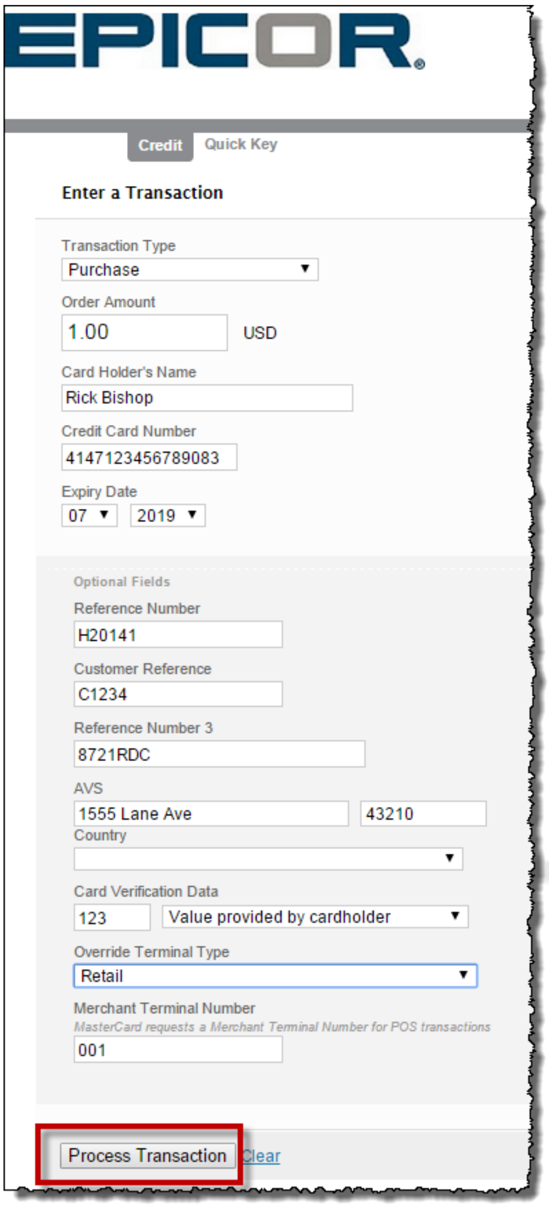
Soft Descriptor Fields - Merchant Administrators can enable soft descriptor support for a terminal by going to Administration -> Terminals, then clicking the appropriate terminal name, and enabling the "Allow Soft Descriptors" option as seen below. If you decide to use the soft descriptor fields we recommend 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 **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.

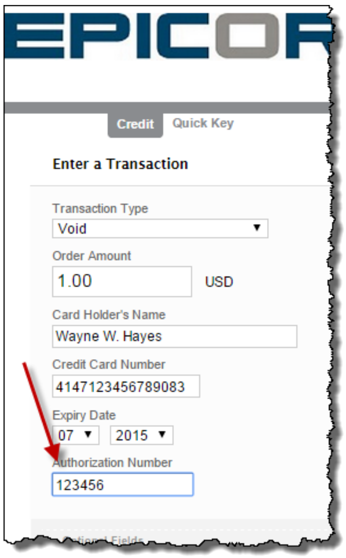
Any desired value may be entered in the **Merchant Terminal Number** field.

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

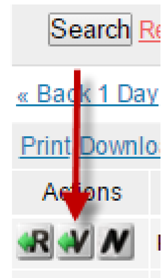
Refund Transaction

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



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.



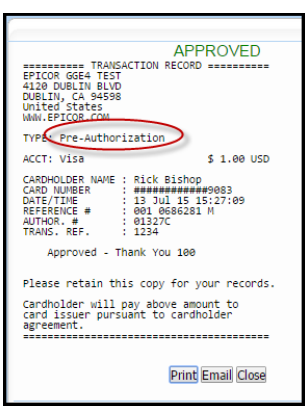
However you may select **Void** from the **Transaction Type** dropdown. Complete the fields as indicated on the left. The **Authorization Number** must be provided.

Forced Post

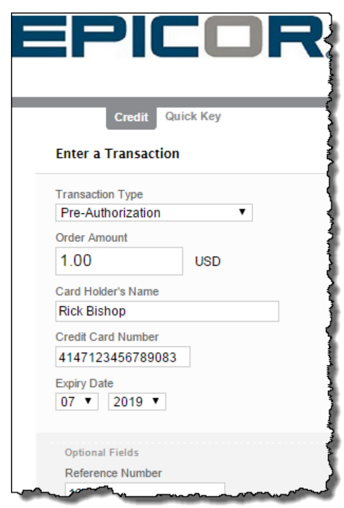
A **Forced Post** transaction is used to enter a transaction with a previous authorization that has not yet been completed or charged to the cardholder. Like a void transaction, a valid authorization code is required. This transaction type could be used to re-enter offline transactions that did not properly 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 <u>not</u> charge the customer's account. Enter fields as described above in the **Purchase** section and click **Process Transaction**.

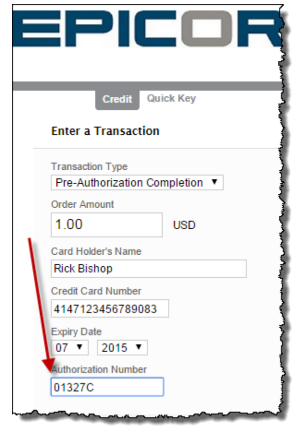


<u>Note:</u> The receipt (shown left) may look like a purchase receipt, it is clearly noted "Pre-Authorization in the **Type** field.

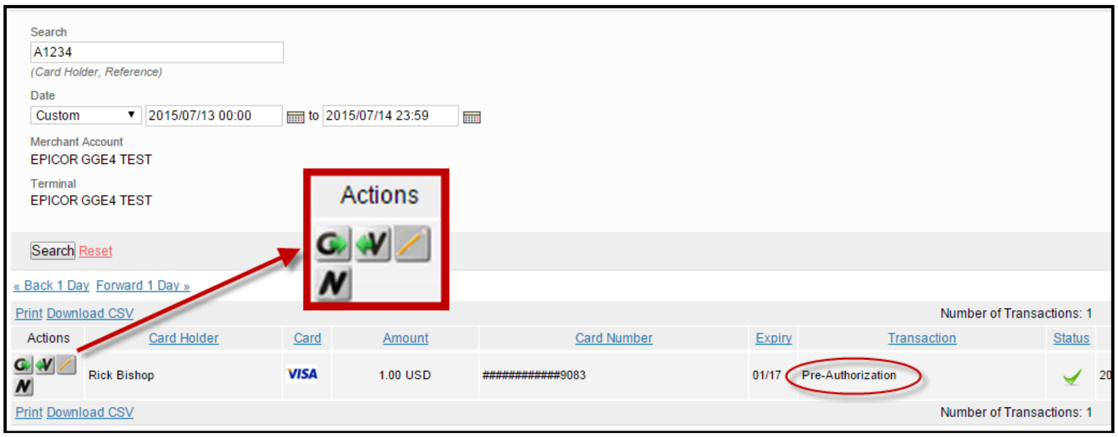


Pre-Authorization Completion

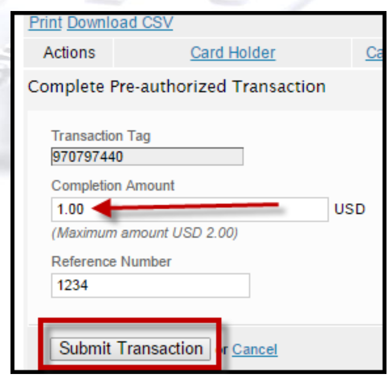
To charge a cardholder's account after obtaining an authorization select **Pre-Authorization Completion** from the **Transaction Type** dropdown. A valid approval code must be entered as shown at right. Click the **Process Transaction** button.



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.



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



Pre-Authorization-Voids, Edits & New Transactions

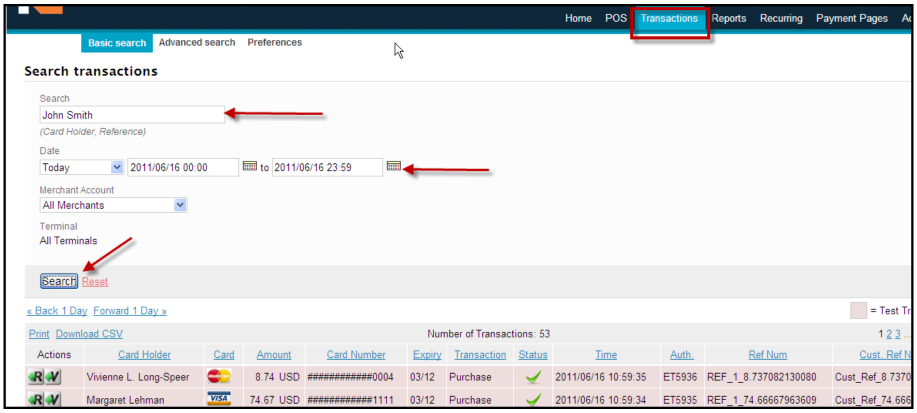
A pre-authorization may be voided beyond the transaction date. The procedure is quite similar to the completion step shown above. Select the **V** button in the **Actions** column and click the **Submit Transaction** button.

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

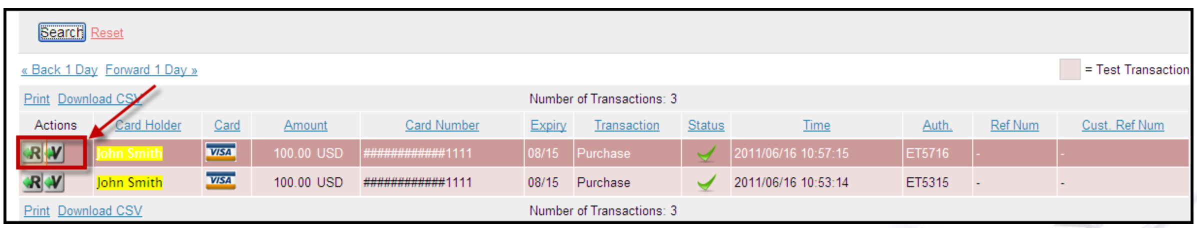
3 Transaction Tab –

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

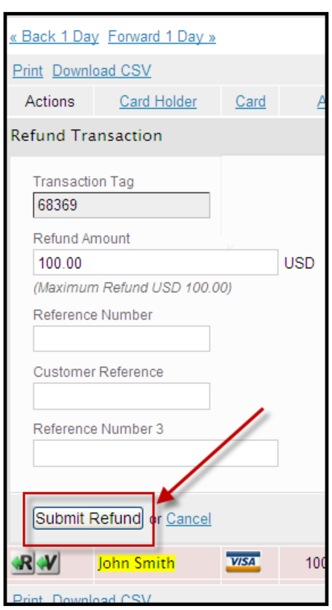
Basic Search



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

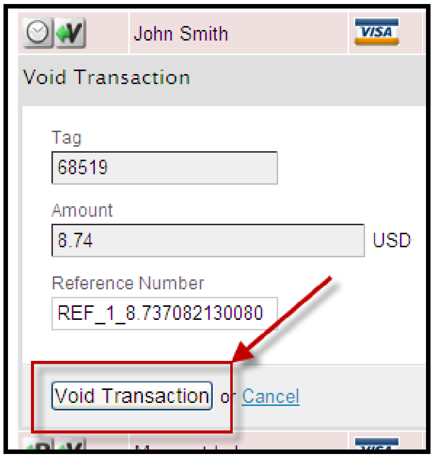


You can create a refund by clicking on the displayed transaction's **R** button or void the transaction by clicking **V**. An example of a refund is shown below.

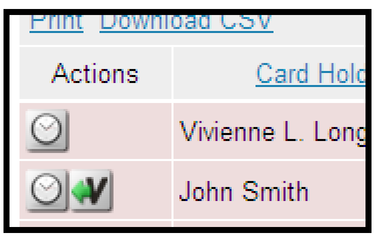


Fill in the **Refund Amount** (up to the maximum indicated), complete optional reference information and click **Submit Refund** button. A receipt showing the refund will display, it can be printed or emailed as described above in section 2.

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.



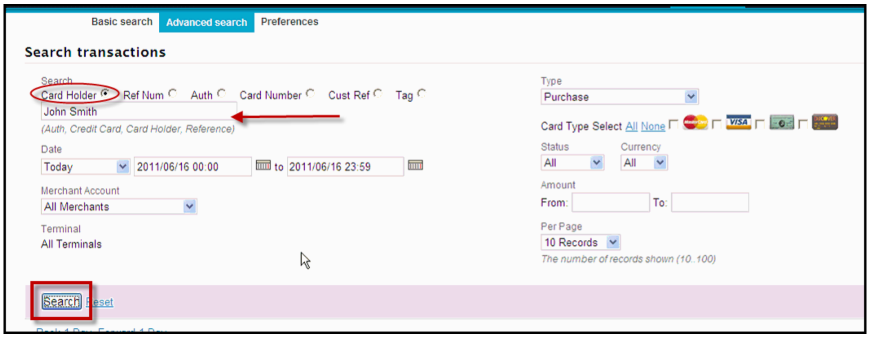
You can view audit history for a transaction by clicking on the clock icon next to the transaction.



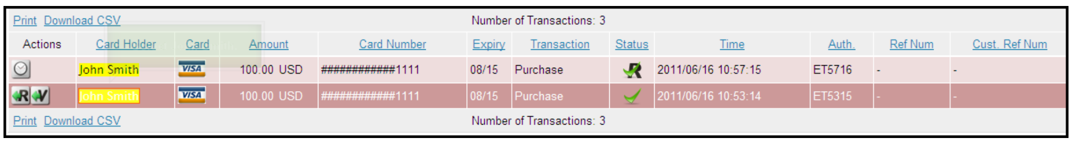
Advanced Search

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

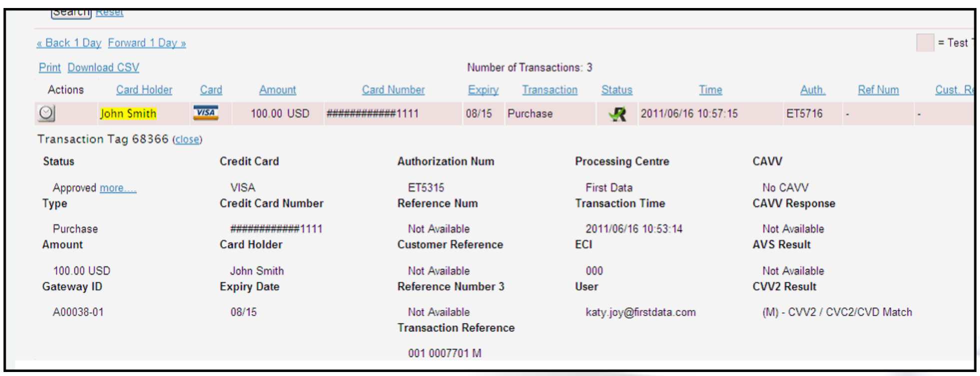
- Cardholder reference number
- Single date or date range
- Multi or single location
- Transaction type
- Card type
- Status
- Currency
- Dollar amount



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

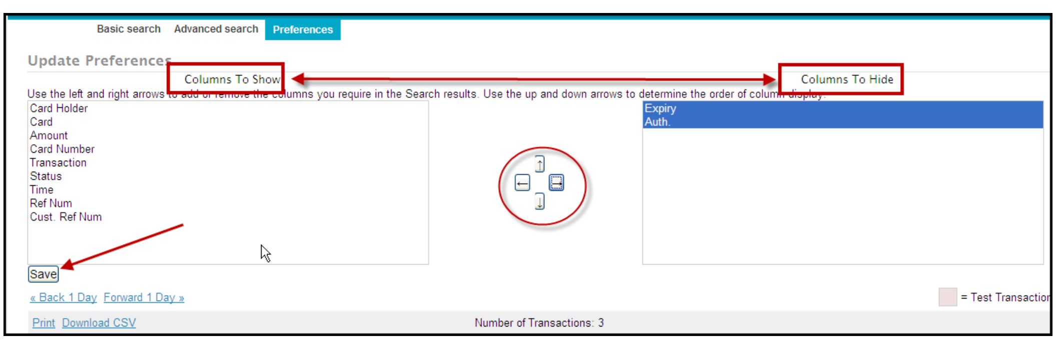


Select the transaction you wish to view and the details display as shown below.



Preferences Tab

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



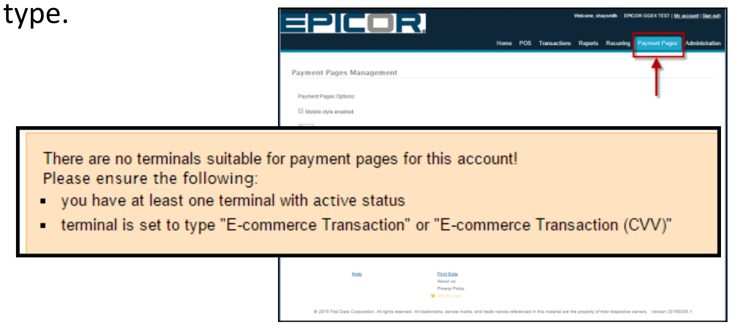
Hide columns by clicking and highlighting them from **Columns To Show** then click the right arrow → to move them into **Columns To Hide**. Highlight columns in **Columns To Hide** and use the left arrow ← to redisplay them. Click the **Save** button to save your changes.

4 Payment Page Setup for iNet users

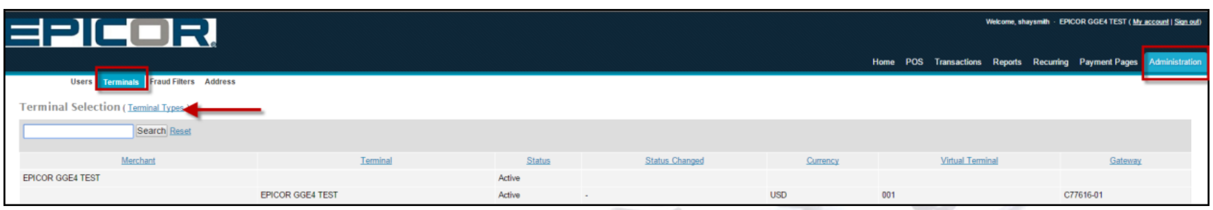
Follow the steps in section 1 to log into your Payeezy Gateway account **be sure to select your eCommerce/iNet Merchant ID** if multiple MID's are listed. From the **Home** page you may click on **Payment Pages** to begin. However, you may wish to follow the preliminary steps outlined below to properly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

Set terminal type to E-Commerce

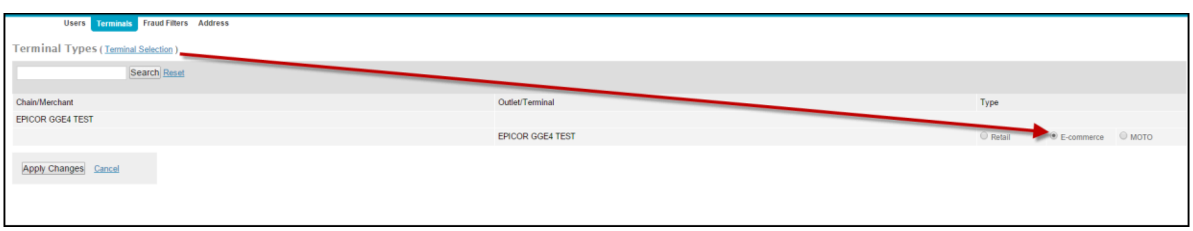
Your terminal type must be set to "E-Commerce". If you see a message as shown here you must change the terminal type.



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



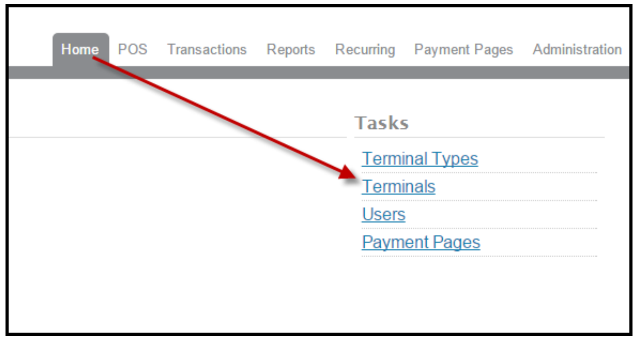
Click the **E-commerce** radio button as shown below and then click **Apply Changes**



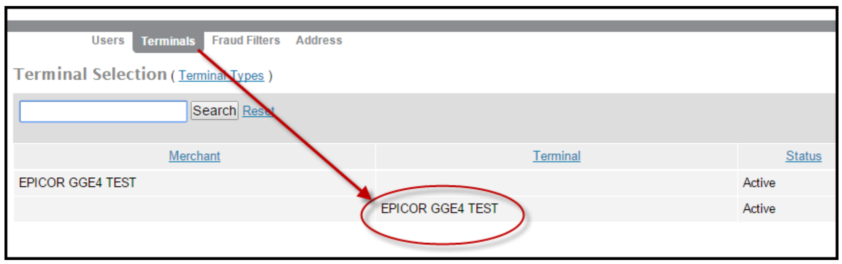
Using CVV2 validation

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

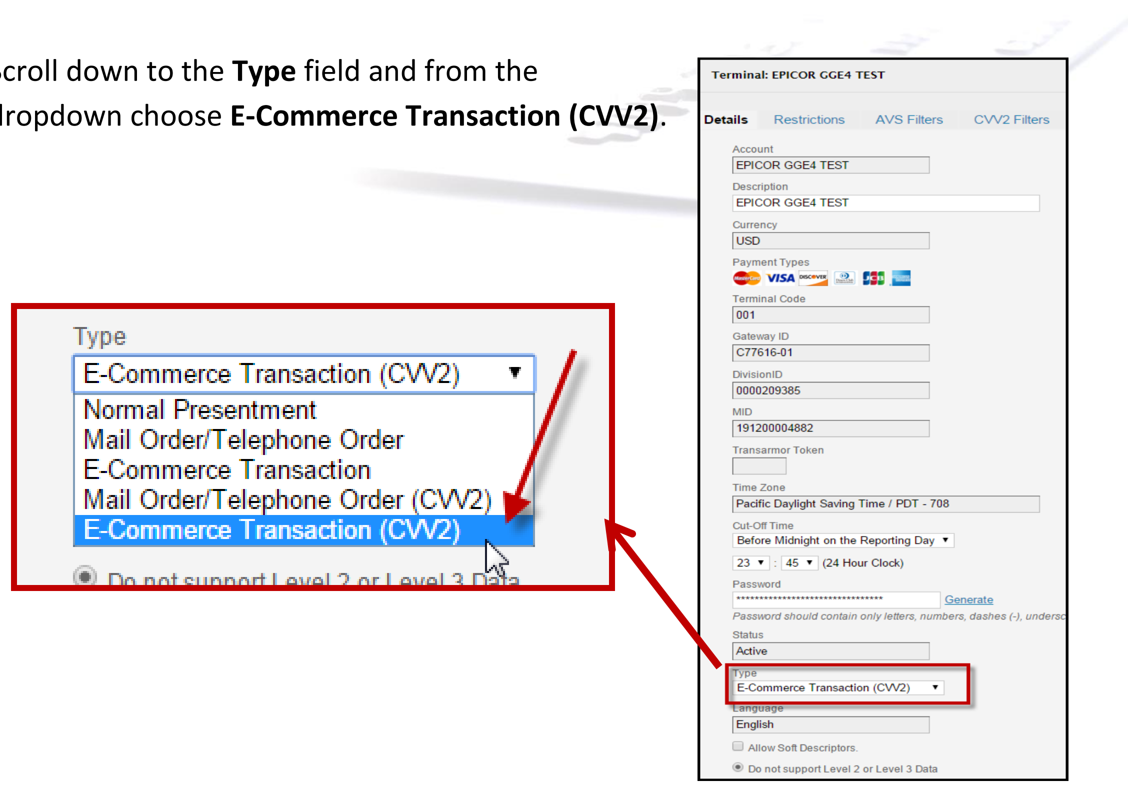
From the **Home** page click on the **Terminals** link.



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

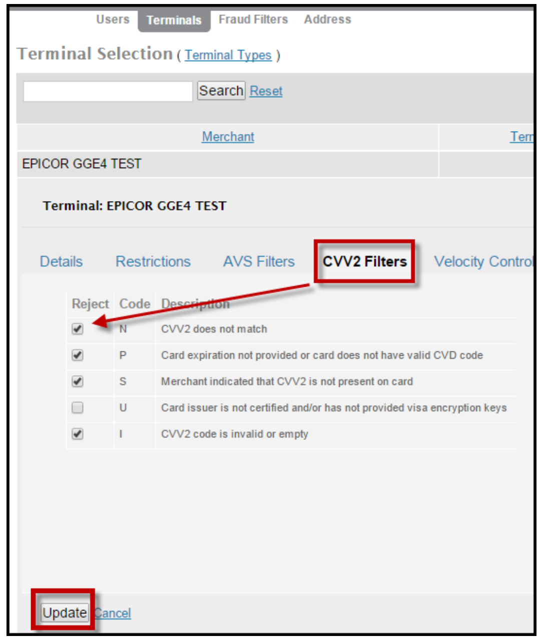


Scroll down to the **Type** field and from the dropdown choose **E-Commerce Transaction (CVV2)**.



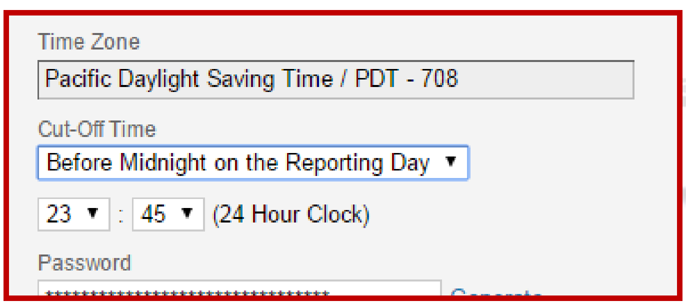
Set CVV2 Filters

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

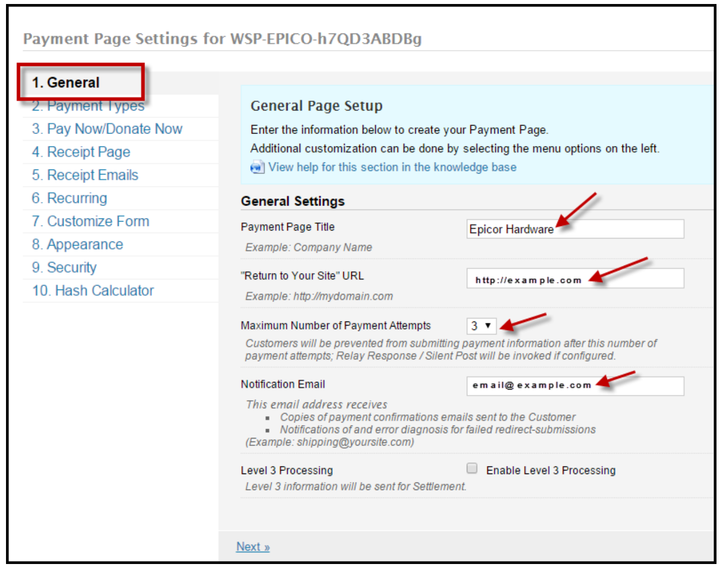
On the same **Terminal Details** screen described in the **Using CVV2 Validation** section. Locate the **Time Zone** field and set for your location. In the **Cut-Off Time** field use the dropdown to select **Before Midnight on the Reporting Day**. Use the dropdowns in the **24 Hour Clock** field to 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**.

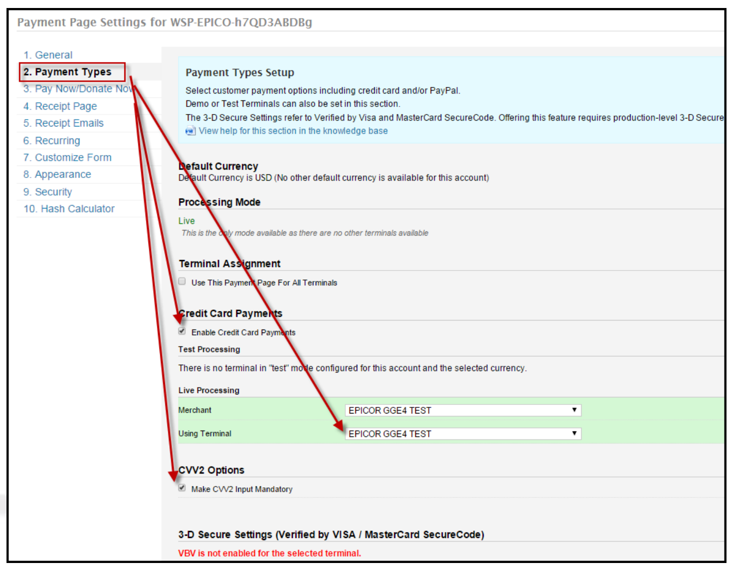
2. **General** Settings-Provide **Payment Page Title**, **Return to Your Site URL, Notification Email** as shown below. An exact URL does not have to be provided; this could be your iNet landing page, or department list.



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

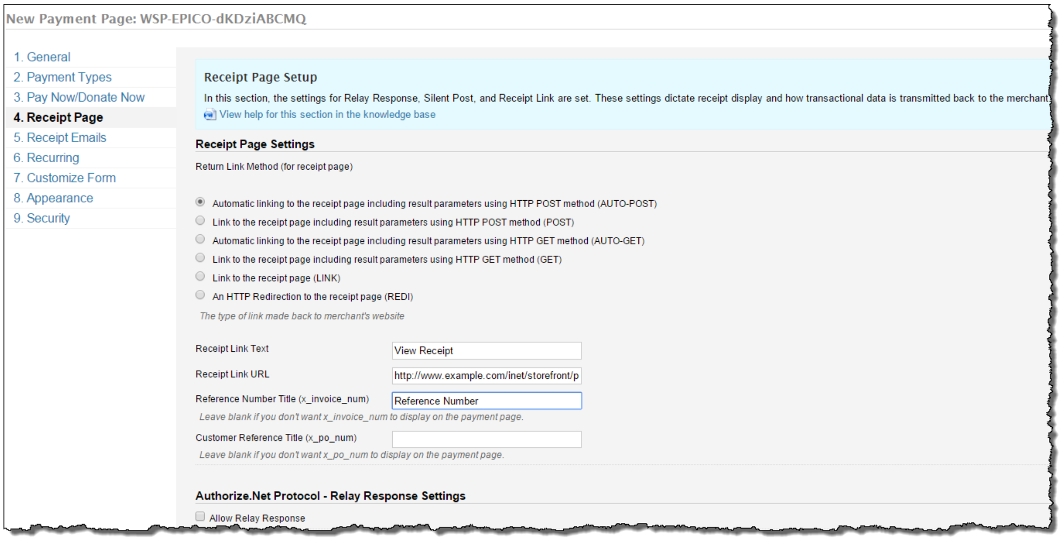
Note that **CVV2 Options** will not display unless you have chosen terminal type **E-Commerce Transaction (CVV2)** as described in the section above.

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

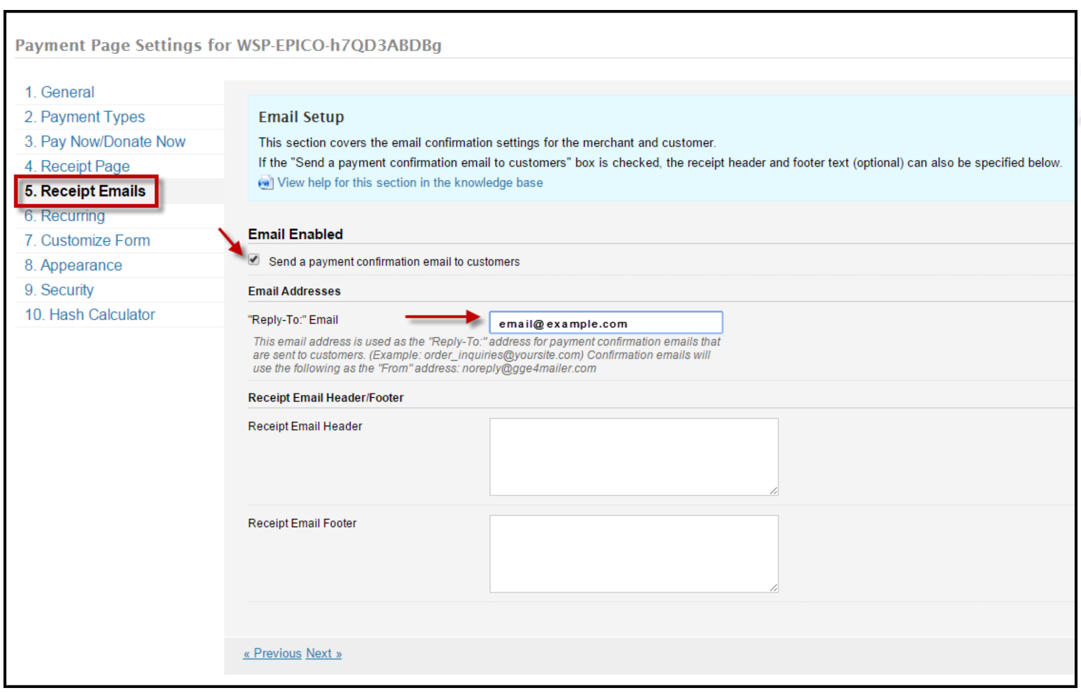


4. **Receipt Page** Settings
   I. Choose **Automatic Linking to the receipt page using HTTP Post method (AUTO-POST)**
   II. Enter Receipt Link Text, for example: **View Receipt**
   III. Enter Receipt Link URL http://www.example.com/inet/storefront/paypage.php
      a. **CRITICAL NOTES!**
         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://"

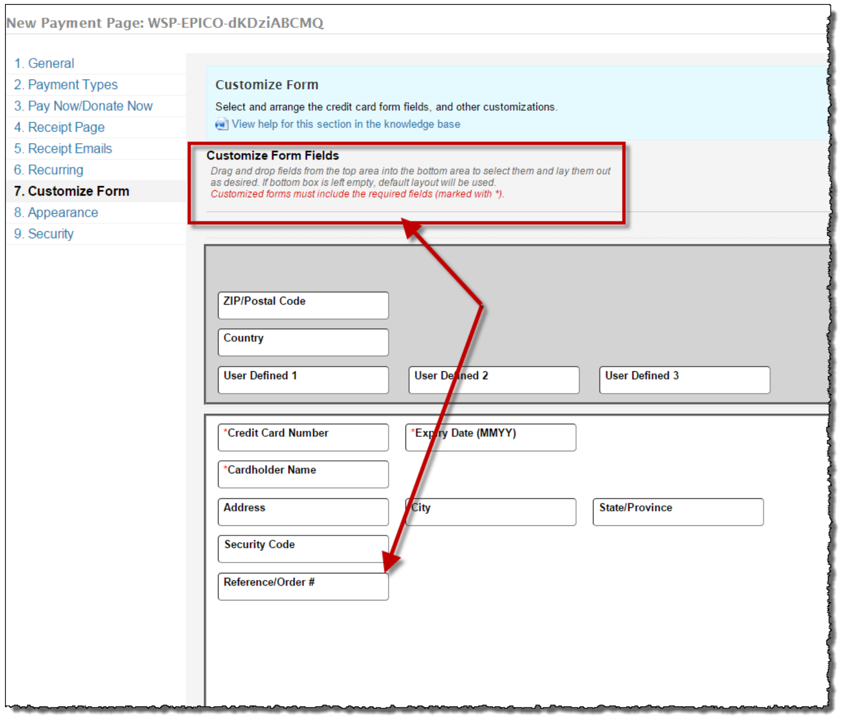
IV. Enter a title for the **Reference Number** field so the iNet reference number will appear on the payment page.



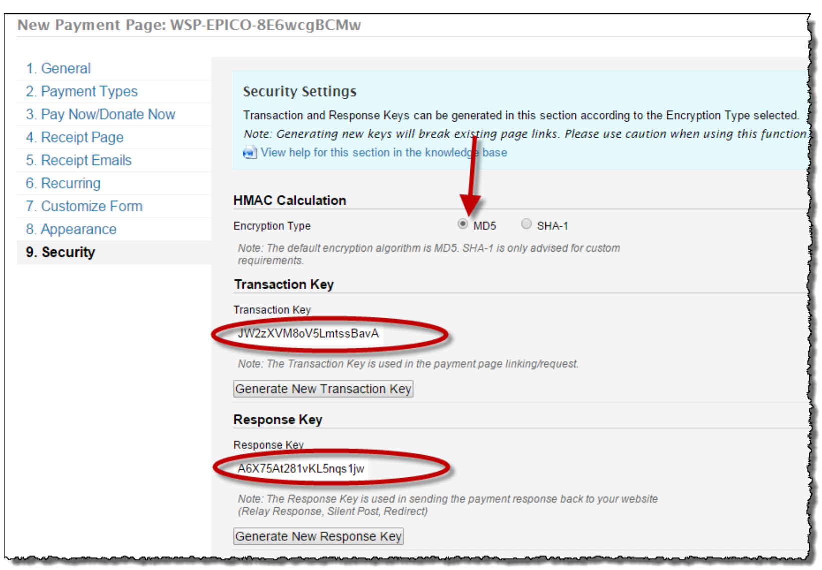
5. Choose **Receipt Emails** – check the box if you wish to **Send a payment confirmation email to customers**. Enter your "Reply To" email address. Note: iNet will send a confirmation email, checking this box may result in sending 2 emails to your customer.



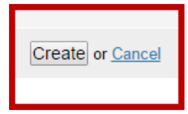
6. Click **Customize Form**, and drag and drop the fields you want displayed on the payment page. We recommend adding **Reference/Order #** which will display the reference number from iNet.



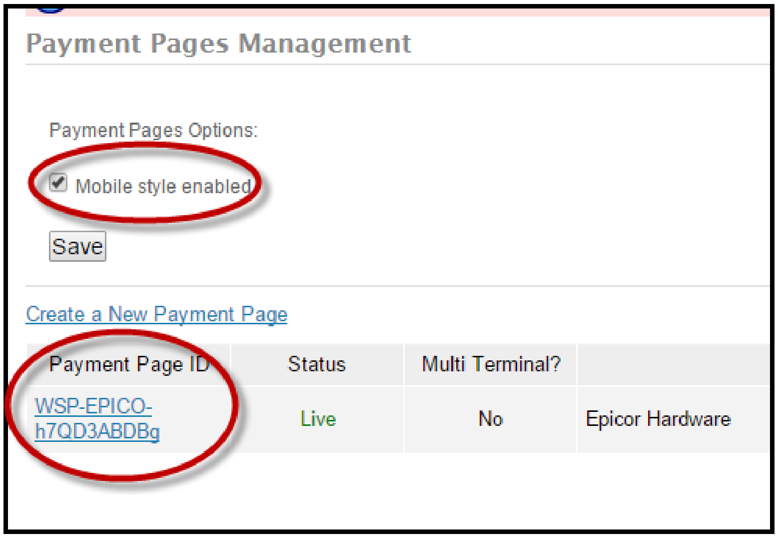
7. Click **Security** and ensure encryption type is set to **MD5**. Make note of the **Transaction Key** (Generate a new one if needed) Make note of the **Response Key** (Generate a new one if needed) – we recommend using copy/paste for these values. It is important that they not be mixed up. Both values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



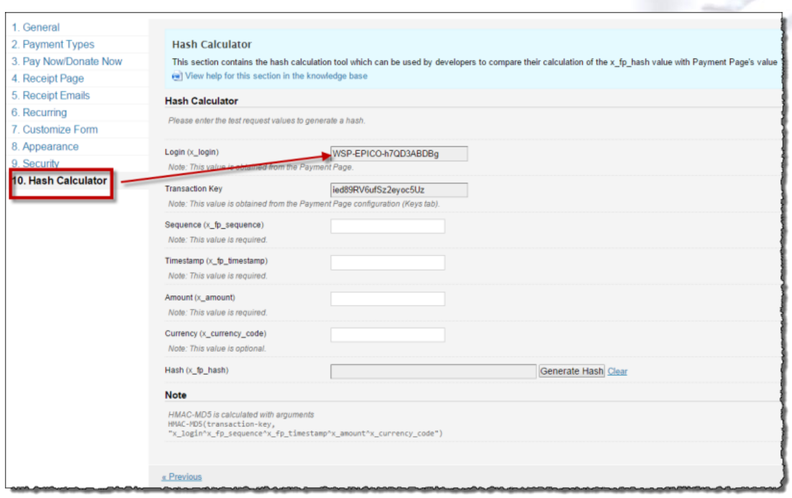
8. Click the **Create** button in the lower right hand side of the window. The **Payment Pages Management** window displays indicating that a Payment Page has been created. Check the **Mobile style enabled** box. Allows your iNet shopper to see mobile optimized payment page.



   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

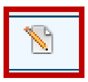
After establishing a Payment Page in Payeezy you may begin setting up your iNet to accept bankcard payments with the “Epicor Payment Exchange – Net” in iNet Gateway setup.

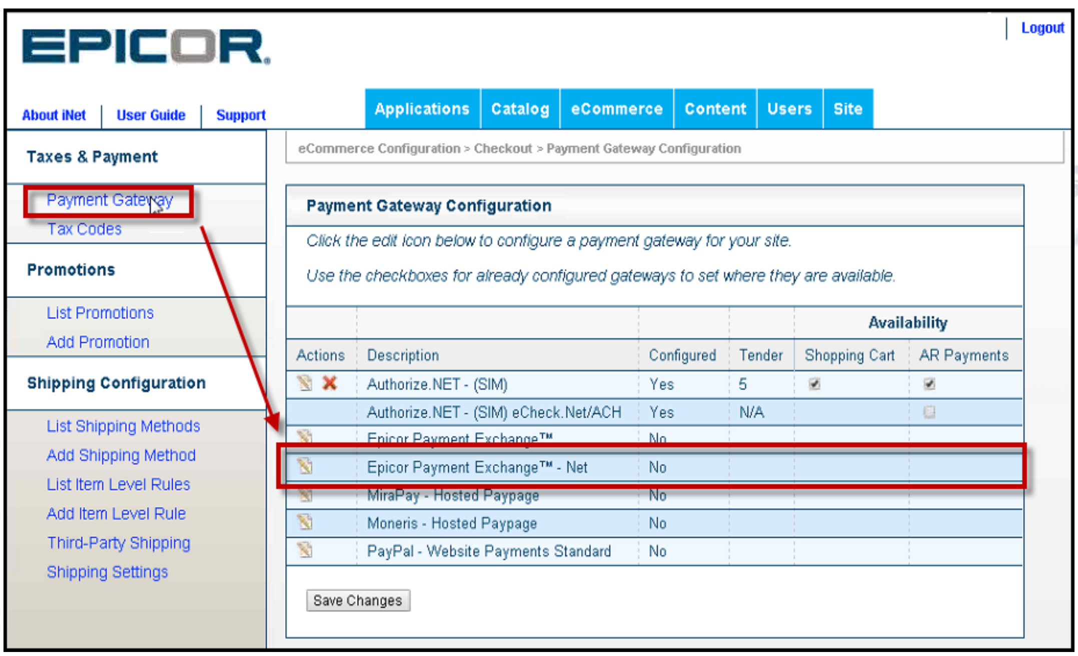
NOTE – Be sure to use “**Epicor Payment Exchange – Net**” with this “Payeezy” setup!

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

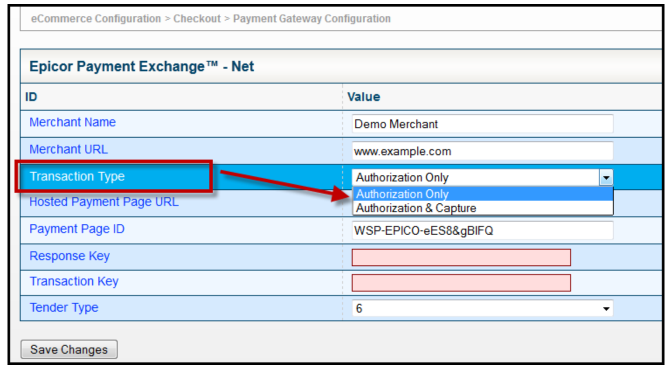
Locate the “Epicor Payment Exchange – Net” payment gateway.

Click edit button to configure.





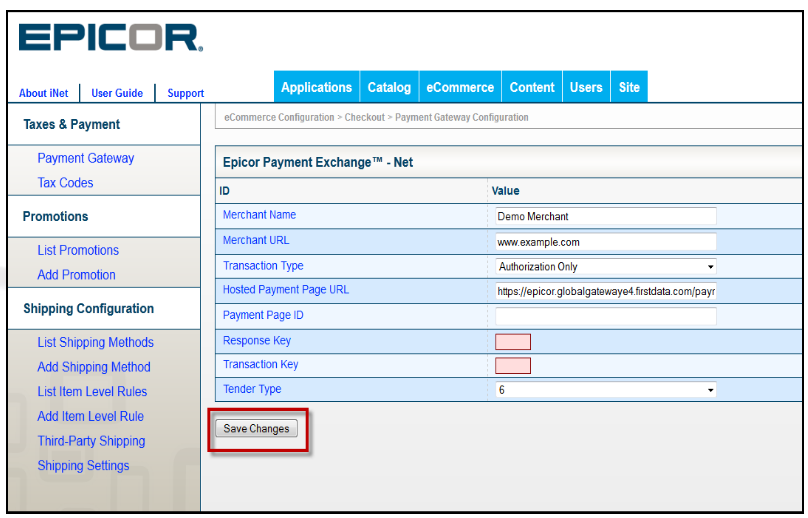
Set **Merchant Name**, **Merchant URL** with your iNet business name and iNet URL.



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**.

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.

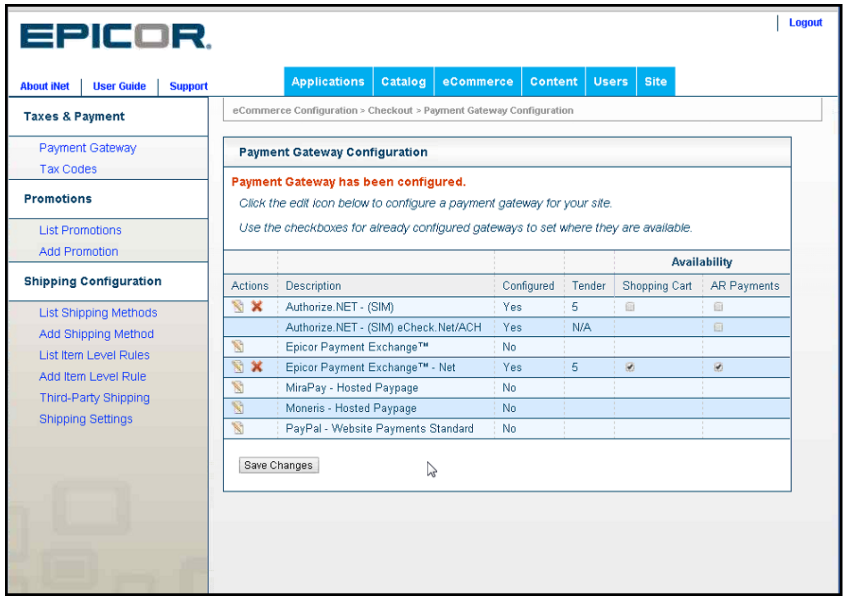
Set **Response Key** & **Transaction Key** to the values from the Payeezy Gateway **Security** tab.

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

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

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

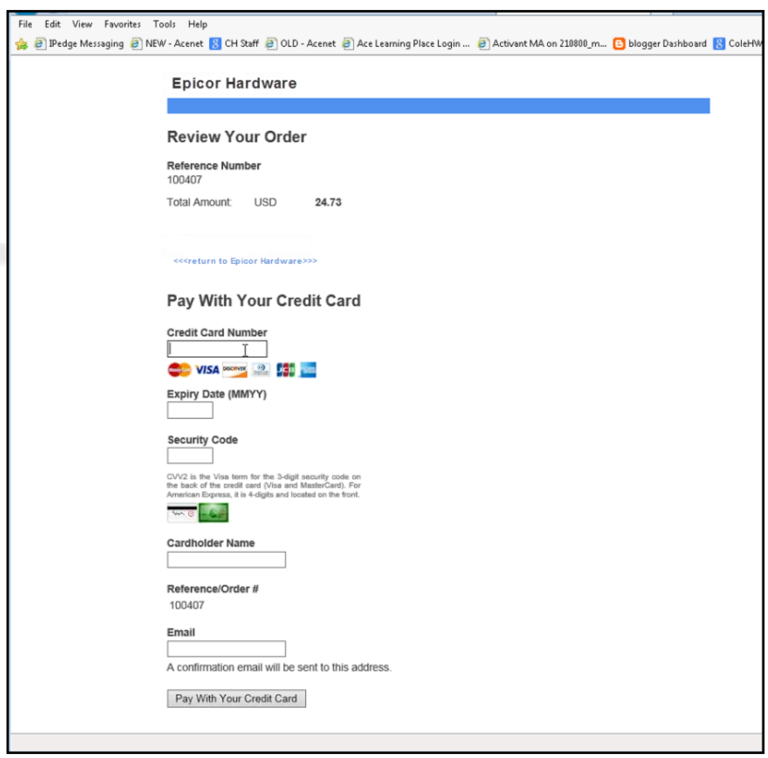
Check the **Shopping Cart** and/or **AR Payments** checkboxes on the **Epicor Payment Exchange – NET** line to enable the gateway for those payments.



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.



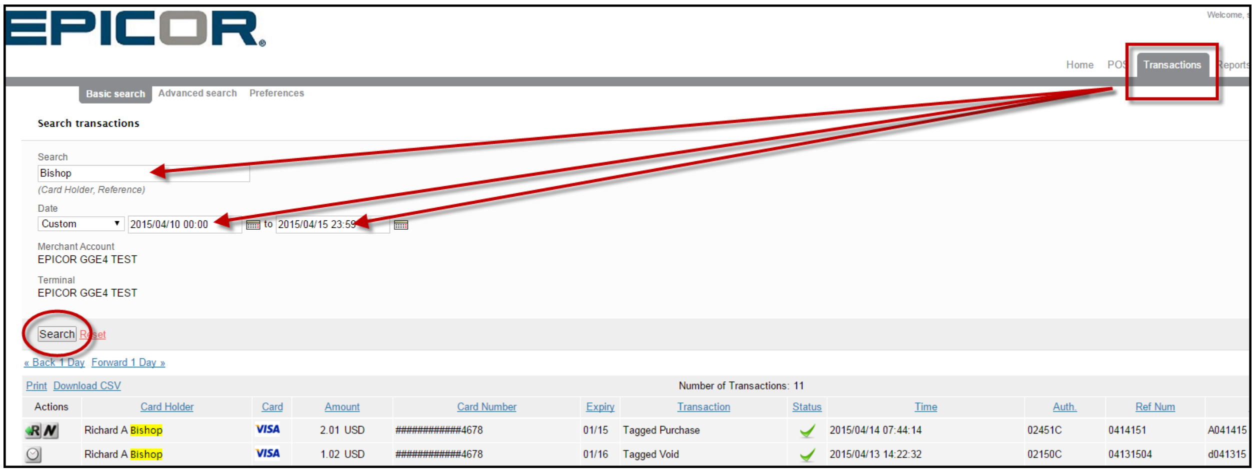
TIP--*If your first transaction is not successful check that no spaces were included when copying and pasting the Payment Page ID, Response Key or Transaction Key.*

6 Using Payeezy Gateway to manage iNet Payments

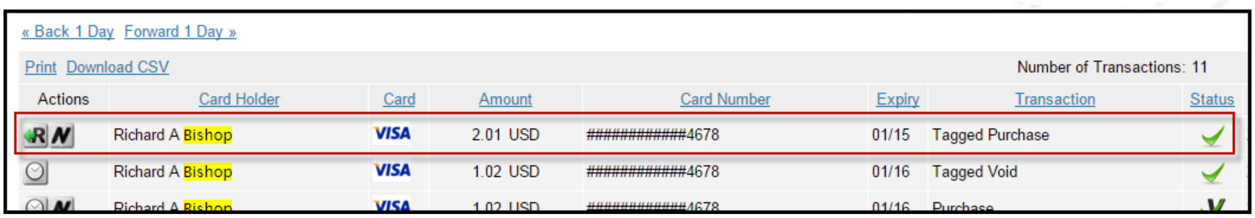
Sections 1 through 3 apply to iNet users as well as Retail POS. In addition to the functions described in those sections you may need to use other features to manage iNet payments. Some of those features are described in the sections below.

Issue a credit on an existing iNet payment

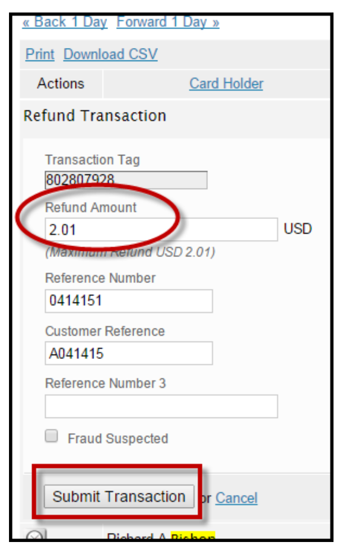
1. Locate the existing transaction. Select the **Transactions** tab. Enter a name or reference number in the reference field. Specify the date range.



2. Locate and verify the desired transaction.

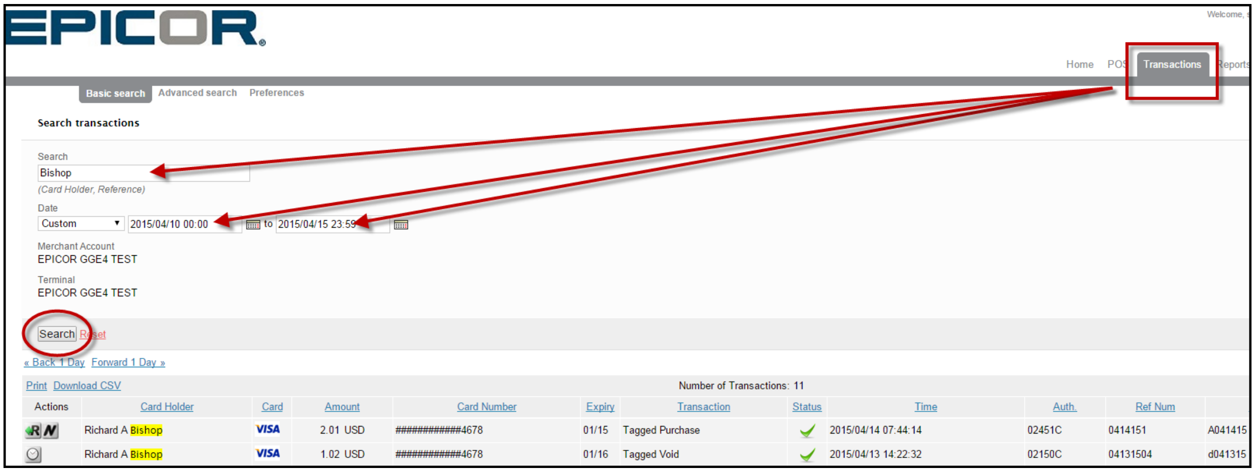


3. To issue a Refund or Credit select the **R** button in the **Actions** column. Enter the amount of the refund, up to the entire sale amount, and click **Submit**.

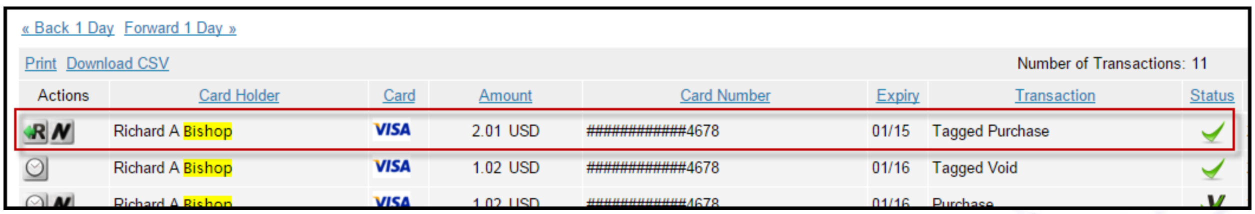


Add charges on an existing iNet payment

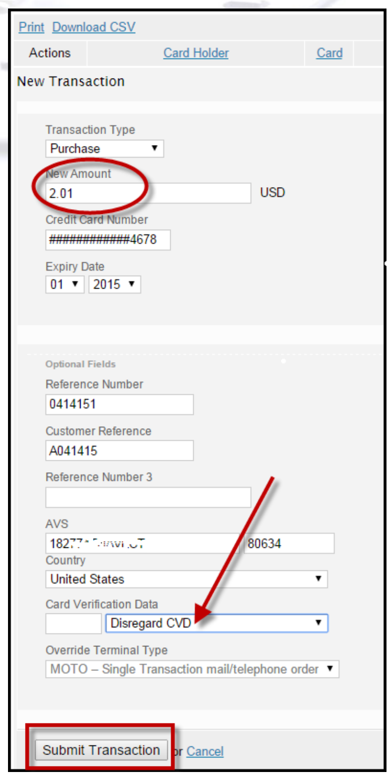
1. Locate the existing transaction. Select the **Transactions** tab. Enter a name or reference number in the reference field. Specify the date range.



2. Locate and verify the desired transaction.



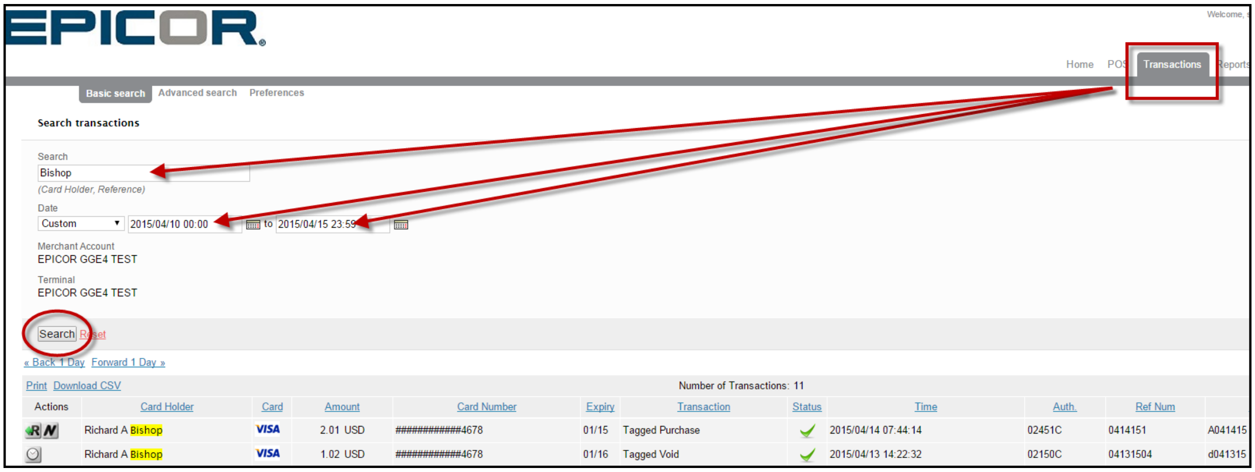
3. Select the **N** button. Enter the additional amount to be charged in the **New Amount** field. Note – If the CVV2 code is known enter it in the **Card Verification Data** field, otherwise select **Disregard CVD** from the dropdown. Click **Submit Transaction**.



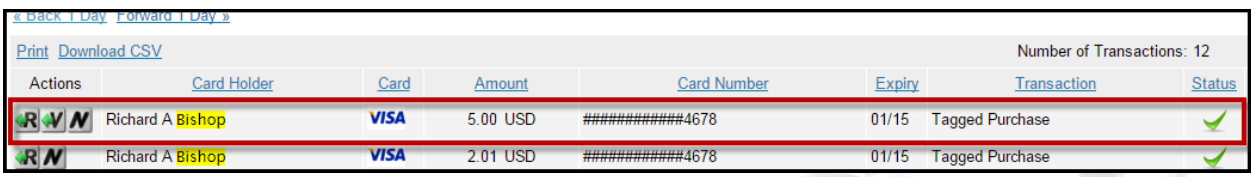
Void an iNet Payment

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

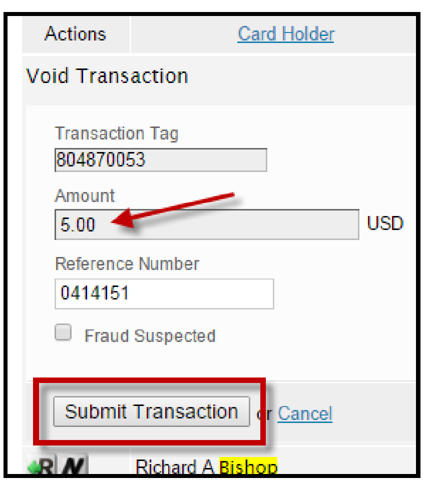
1. Locate the existing transaction. Select the **Transactions** tab. Enter a name or reference number in the reference field. Specify the date range.



2. Locate and verify the desired transaction.

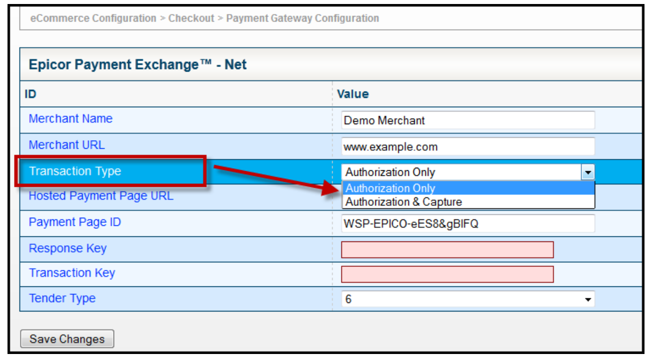


3. Select the **V** button. Verify the amount being voided, and then click **Submit Transaction**.

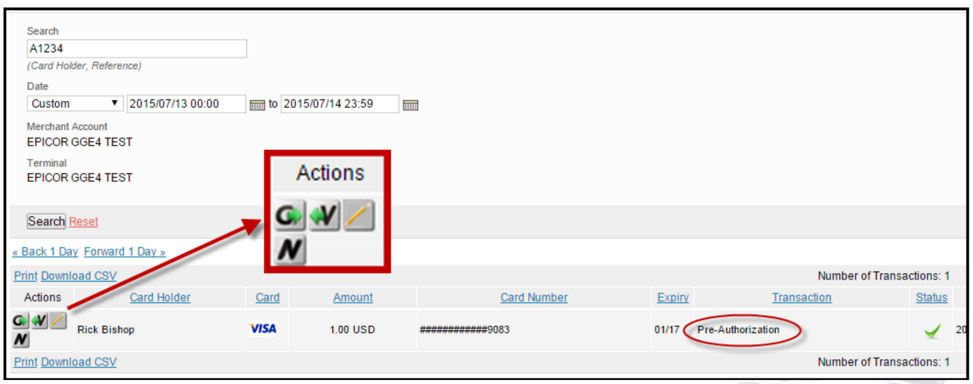


Complete an “Authorization Only” Transaction

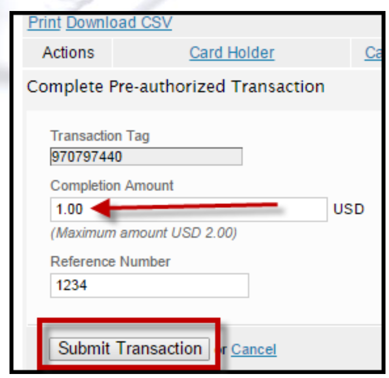
If the **Transaction Type** field in your iNet Payment Gateway Configuration page is set to **Authorization Only**, you must return to the Payeezy Gateway at a later date and complete each transaction in order to receive funding.



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



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.

7 Payment Page Setup for Tablet POS users

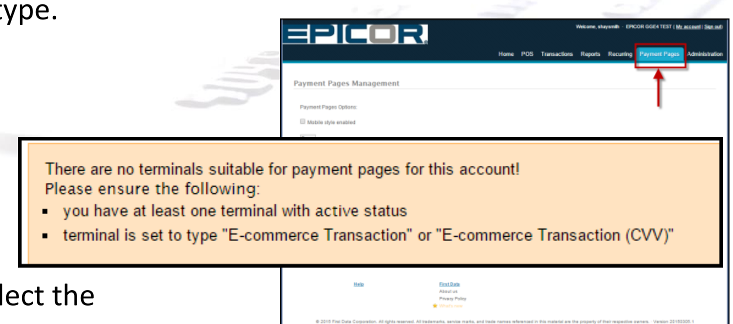
Notes Before you begin!

- **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.

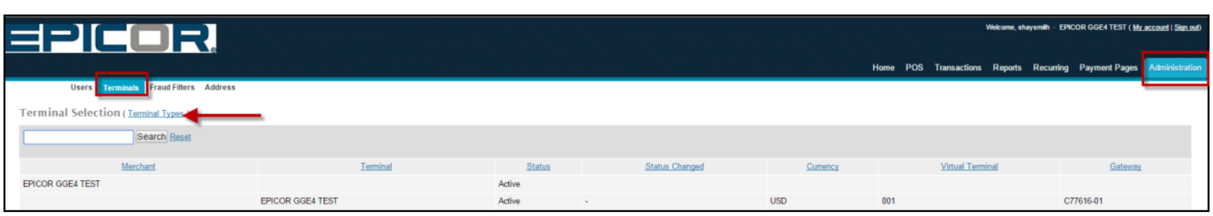
Follow the steps in section 1 to log into your Payeezy Gateway account and **be sure to select your Mobile Merchant ID** if multiple are listed. From the **Home** page you may click on **Payment Pages** to begin. However, you may wish to follow the preliminary steps outlined below to properly configure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

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

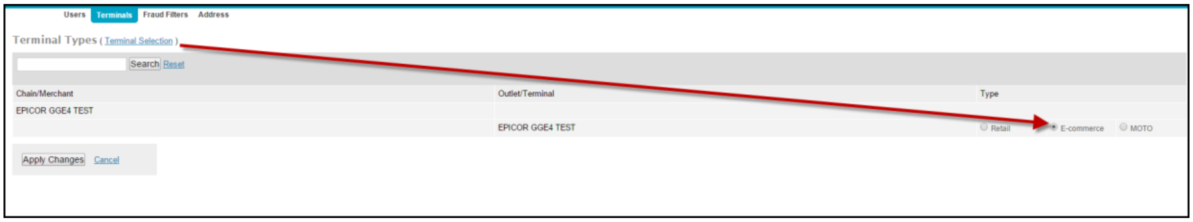
Your terminal type must be set to "E-Commerce". If you see a message as shown here you must change the terminal type.



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



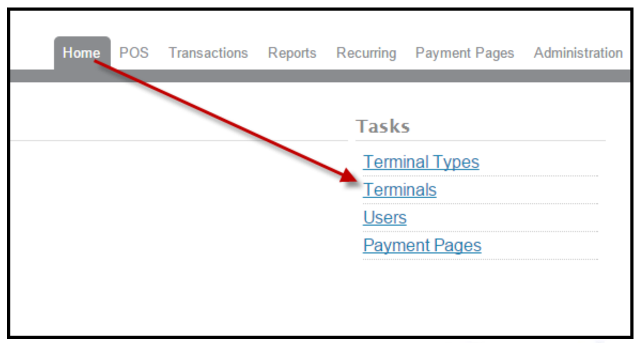
Click the **E-commerce** radio button as shown below and then click **Apply Changes**



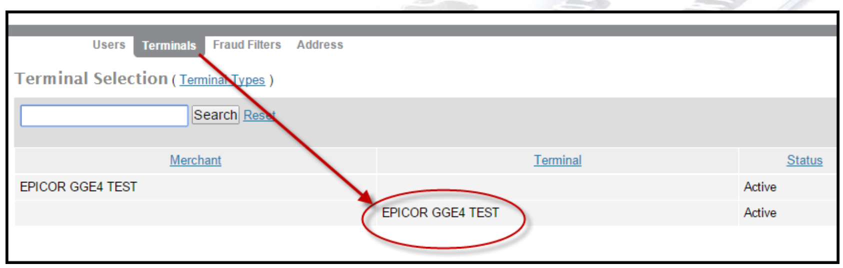
Using CVV2 validation

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

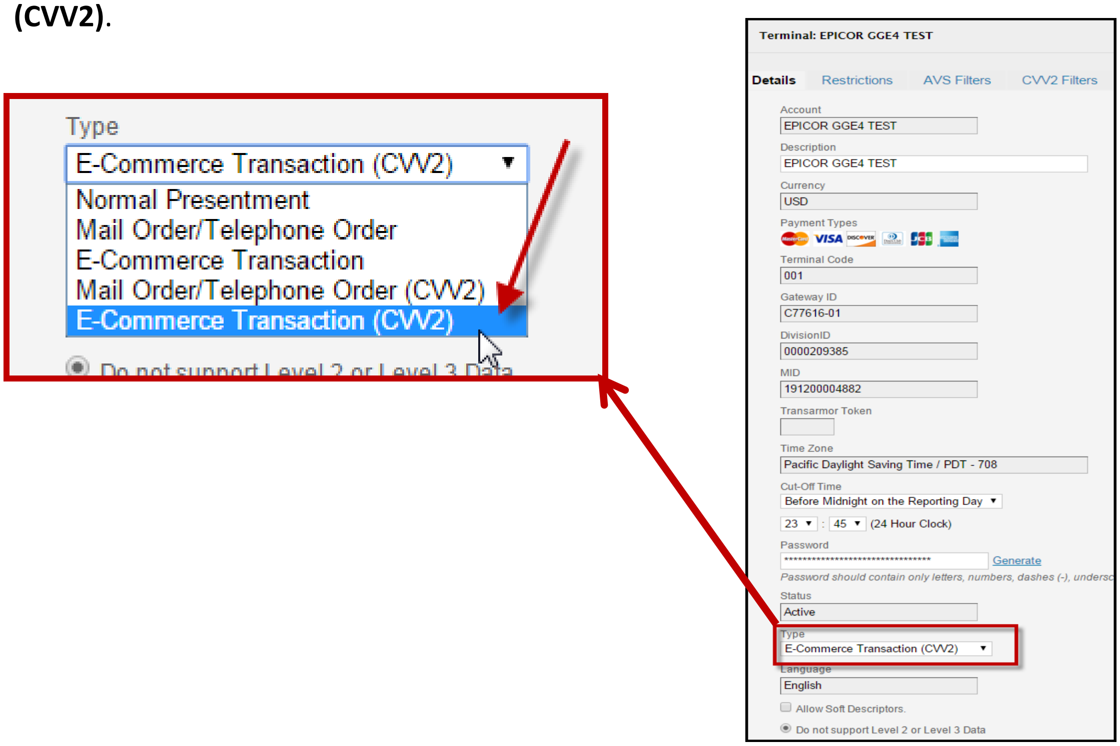
From the **Home** page click on the **Terminals** link.



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

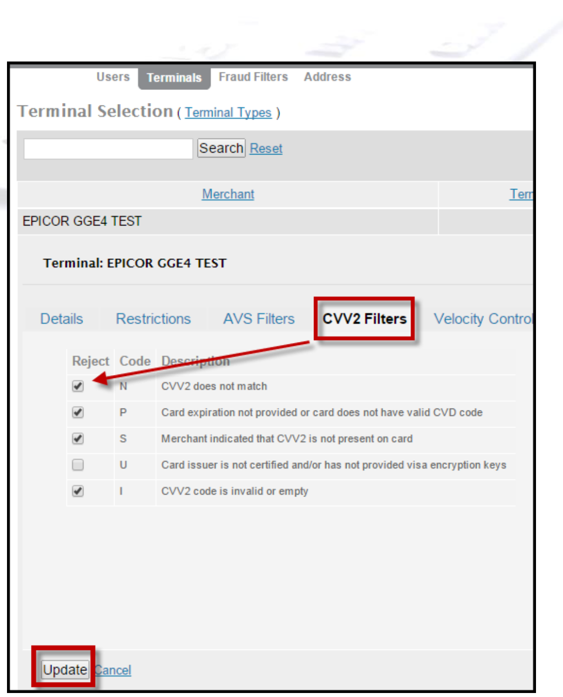


Scroll down to the **Type** field and from the dropdown choose **E-Commerce Transaction (CVV2)**.



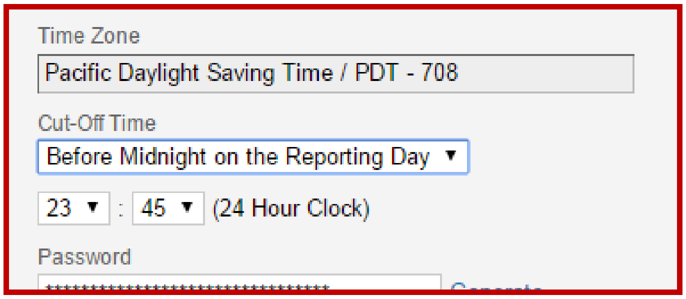
Set CVV2 Filters

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

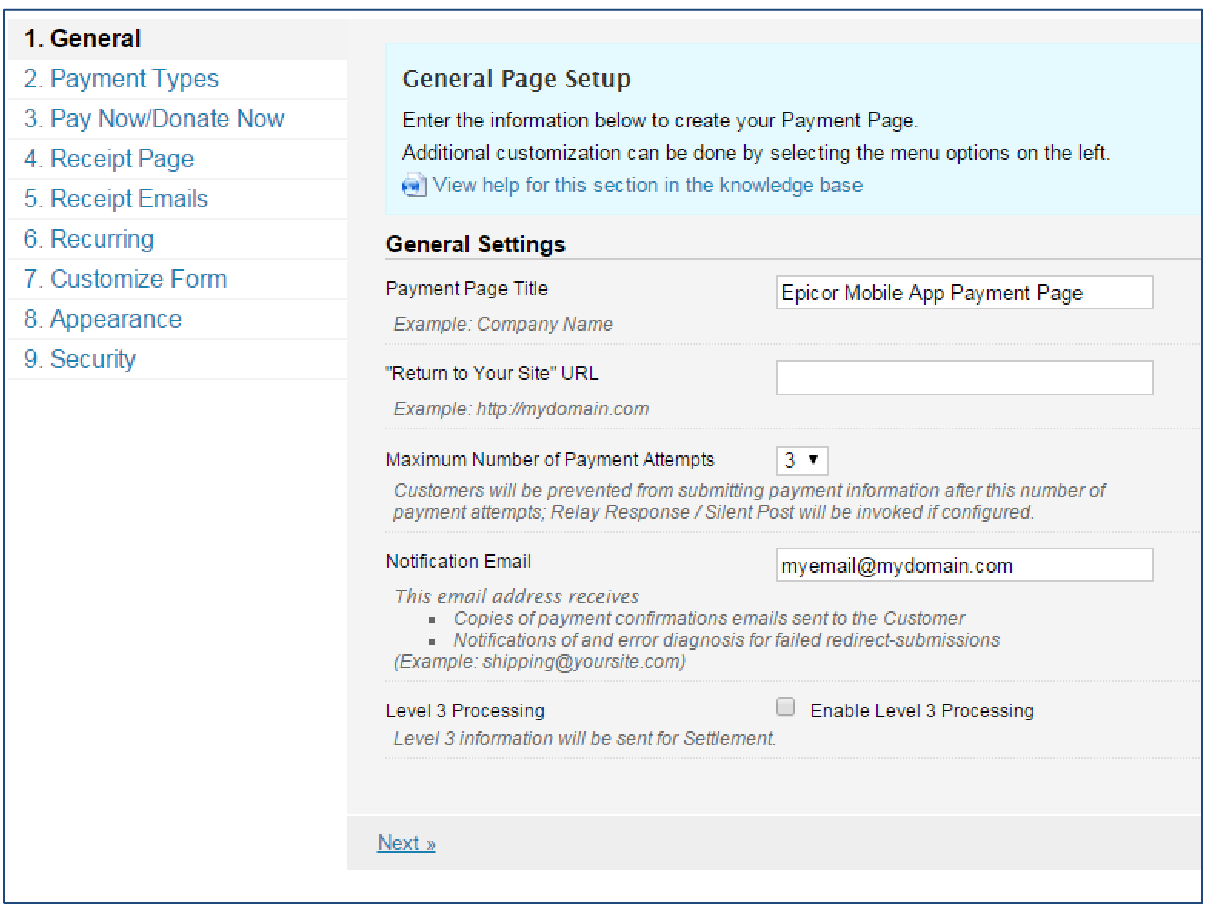
On the same **Terminal Details** screen described in the **Using CVV2 Validation** section. Locate the **Time Zone** field and set for your location. In the **Cut-Off Time** field use the dropdown to select **Before Midnight on the Reporting Day**. Use the dropdowns in the **24 Hour Clock** field to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



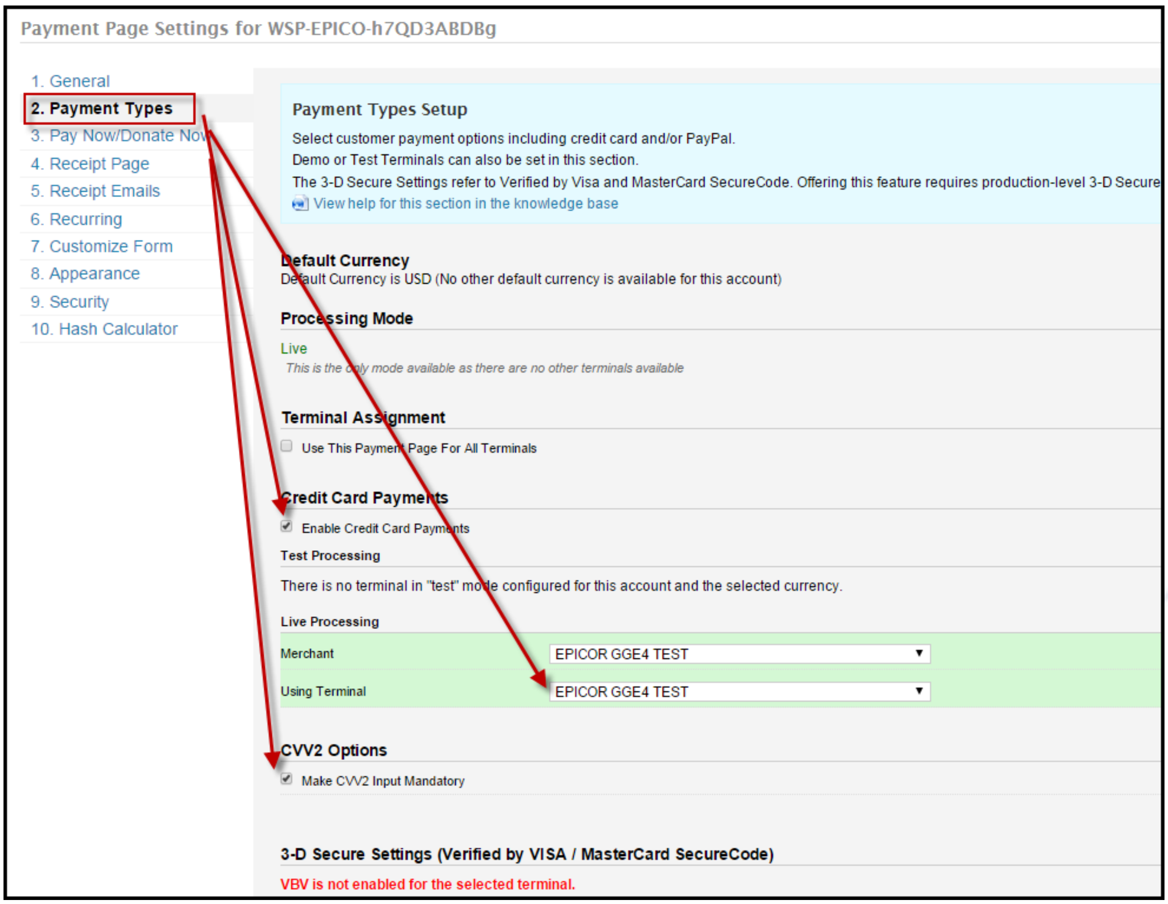
Create a Mobile App Payment Page for Tablet POS

1. Select **Payment Pages** and the 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.



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.

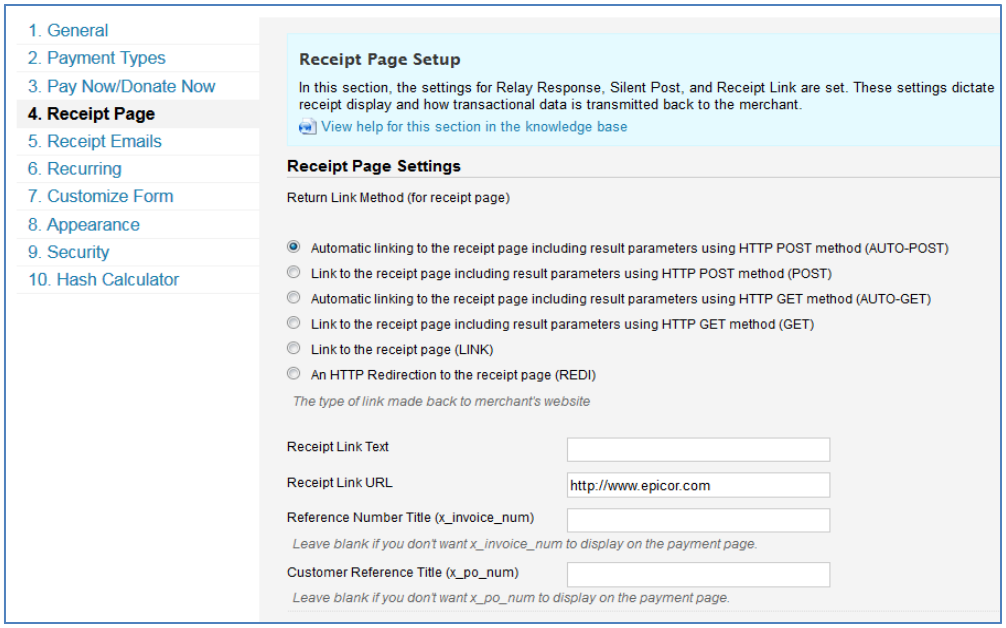


4. **Receipt Page** Settings

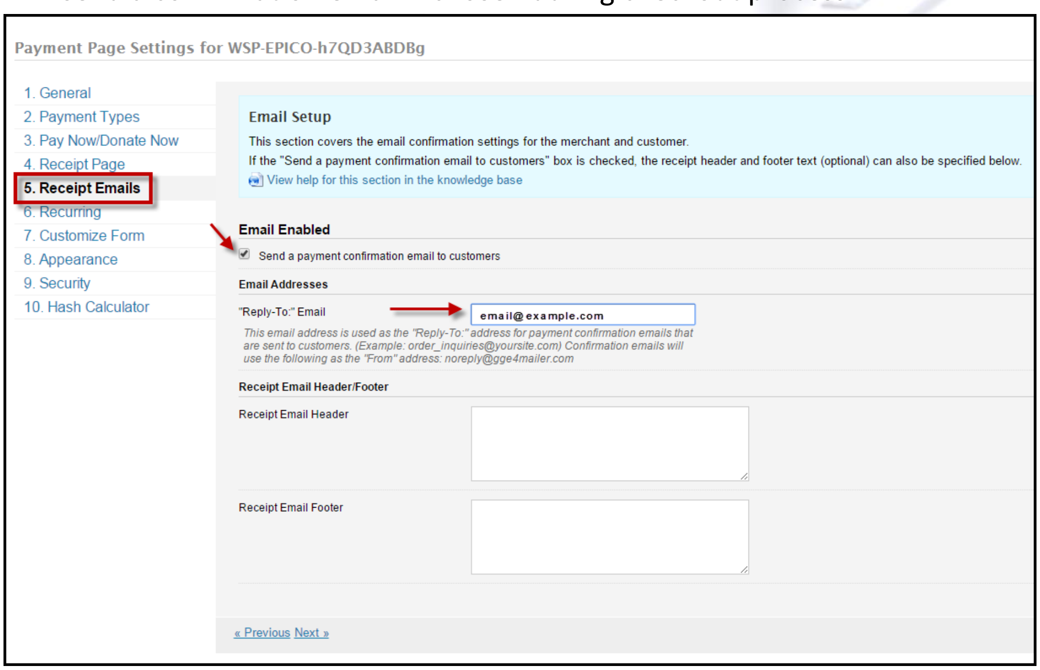
    I. Choose **Automatic Linking to the receipt page using HTTP Post method (AUTO-POST)**

    II. Enter Receipt Link URL exactly like this http://www.epicor.com

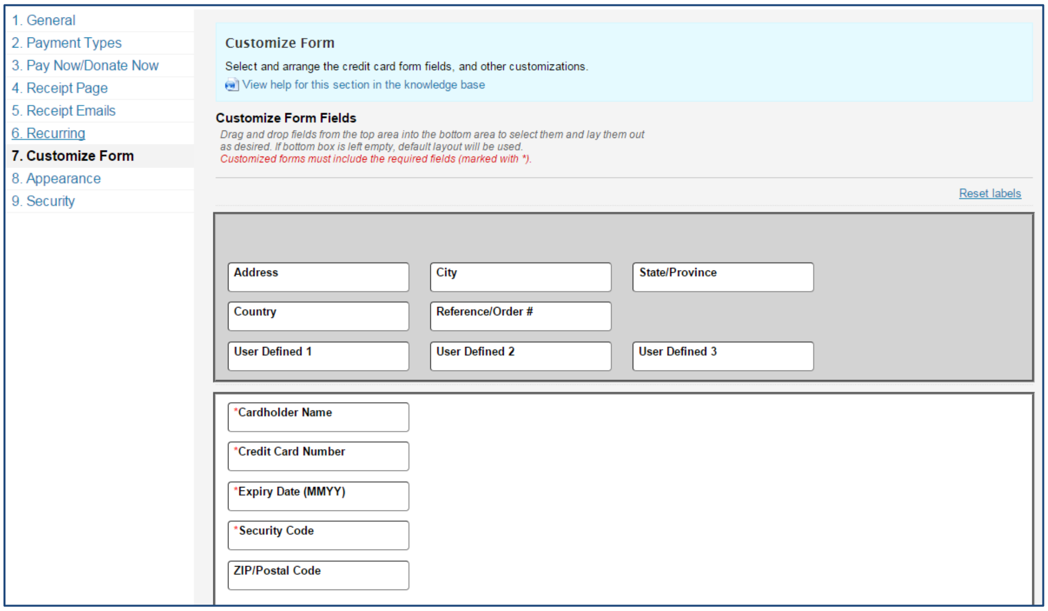
NOTE DO NOT FILL IN ANY OTHER FIELDS OR APP WILL NOT WORK



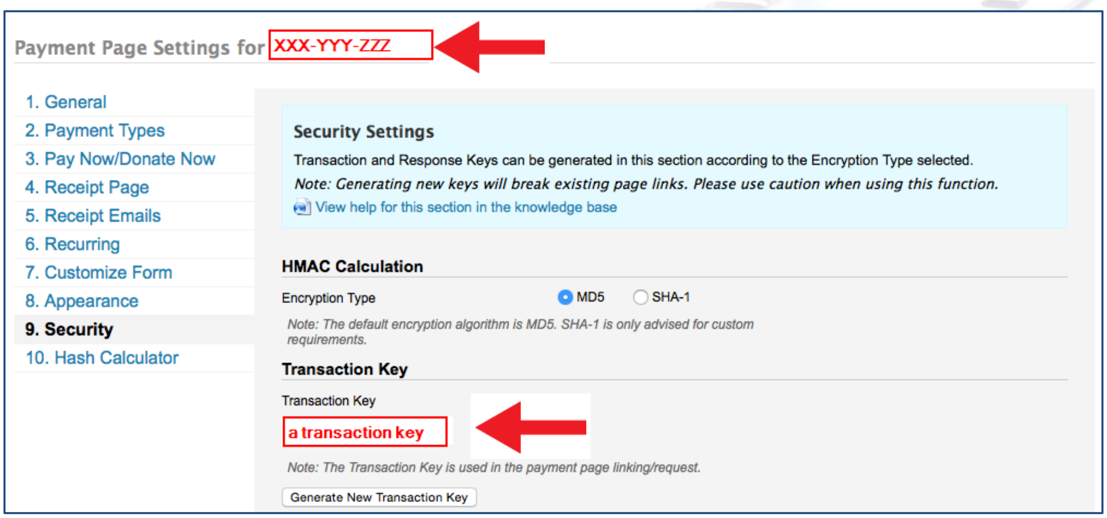
5. Choose **Receipt Emails** – check the box if you wish to **Send a payment confirmation email to customers**. Enter your "Reply To" email address and header/footer messages. Note: Tablet will send a confirmation email if chosen during checkout process



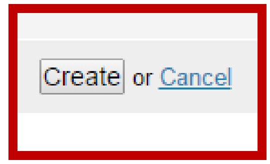
6. Click **Customize Form**, and drag and drop the fields you want displayed on the payment page. We recommend adding **Zip Code** in addition to mandatory fields (Cardholder Name, Credit Card Number, Expiry Date (MMYY) and Security Code) as shown below:

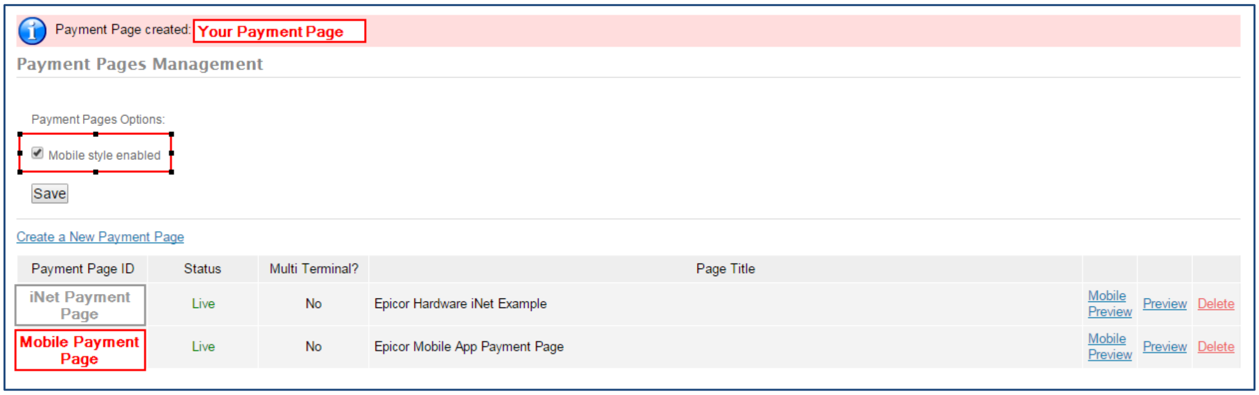


7. Click **Security** and ensure encryption type is set to **MD5**. Make note of the **Transaction Key** (Generate a new one if needed). Make note of the unique **Payment Page ID** as listed next to **"Payment Page Settings for XXX-YYYY-ZZZ".** These values will be entered in the Mobile App setup for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

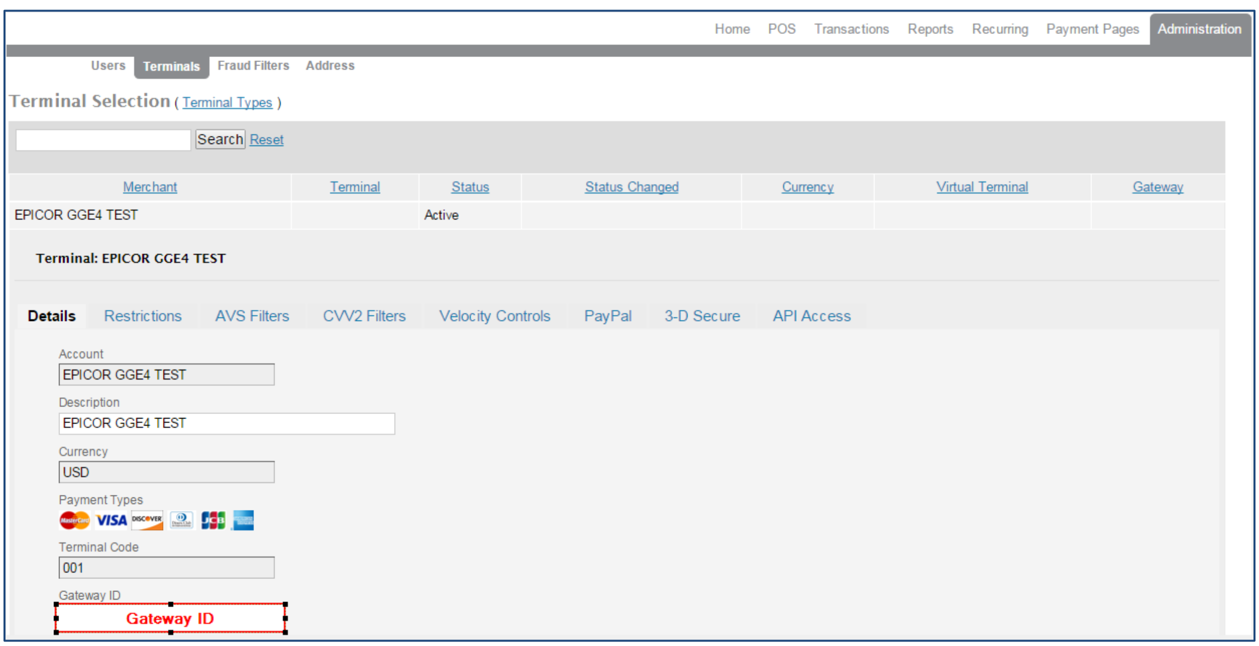


8. Click the **Create** button in the lower right hand side of the window. The **Payment Pages Management** window displays indicating that a Payment Page has been created. Check the **Mobile style enabled** box to create a mobile payment page.





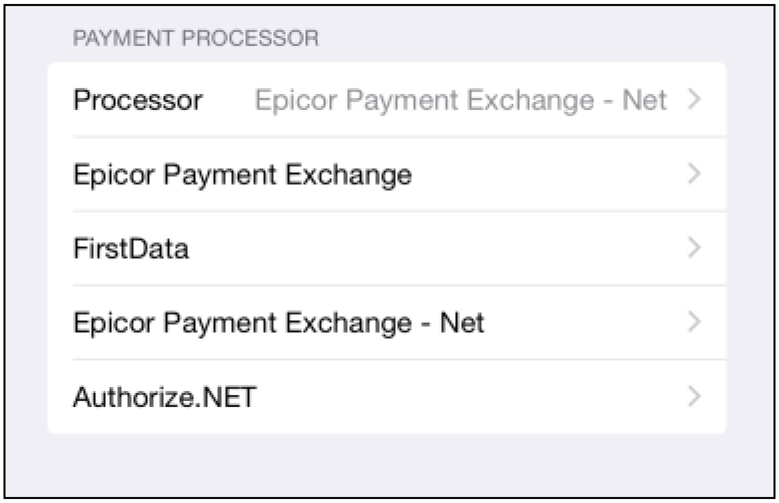
9. Follow the **Tablet POS Manual Payment Setup** instructions in section 8 to complete setup for your mobile payment application hand keyed transactions.
   I. Be sure to note your Gateway ID for this terminal. You can obtain this by clicking Administration > Terminals and selecting the mobile Terminal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



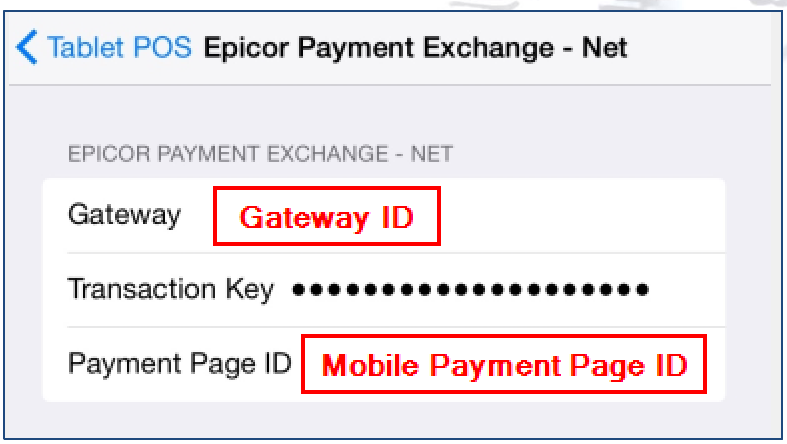
8 Tablet POS Manual Payment setup

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.