

CONVERGE GUIDE

The Xpress-pay Team endeavors to educate and inform our clients how to use all available tools to ensure that vital information is readily available and your experience with ePayments is positive. To this end, this information will help you in performing common functions such as voids, refunds, and reconciliation.

This guide was authored and is being provided as a courtesy by the Xpress-pay Team. It contains a synopsis of information you'll commonly need in the course of accepting ePayments.

For additional assistance, please contact the Converge Support Department at (800) 377-3962. For security reasons, you may be asked for your account ID.

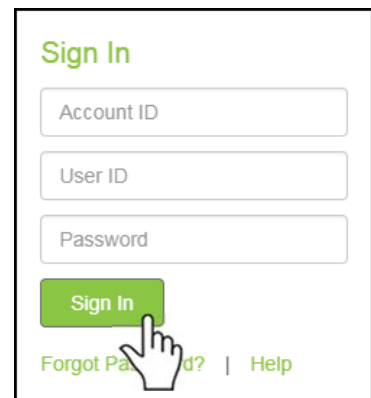
Logging into the Converge Gateway

To process refunds or voids, review declined payments, or view batch settlements, visit the Converge website:

<https://classic.convergepay.com/VirtualMerchant/>

The CONVERGE login screen will require your Account ID, User ID, and Password. These credentials were provided to you during the initial Xpress-pay setup.

Click *Sign In* to proceed.



Converge Gateway Home/Landing Page

After signing in, you will arrive at the Converge Main/Landing page. Information you commonly need will be under Current Batches or Settled Batches.

The main menu is on the left side of this page. Click these links to navigate within the Converge Gateway. Your view may differ depending on the browser you use and its settings.

CURRENT BATCHES

To show Current Batches, click Current Batches on the menu, click Main, and finally, Credit Card. This will reveal your current open transactions.

Current Batches: Credit Card

Select a transaction to review the authorization details.

Current Open Transactions Download | Reports | Reports Plus | Search | Filter: All

	User ID	Tran Status	Tran Type	Tran Date	Tran Time	First Name	Last Name	Card Data	Entry Type	AVS Code	CVV2 Code	Total Amount
<input type="checkbox"/>		Pended	Sale	04/23/2018	08:43	Theodore			K		M	10.50
<input type="checkbox"/>		Pended	Sale	04/22/2018	22:43	gedalia			K		M	10.50
<input type="checkbox"/>		Pended	Sale	04/22/2018	13:26	Colin			K		M	10.50
<input type="checkbox"/>		Pended	Sale	04/22/2018	09:49	pj			K		M	100.00
<input type="checkbox"/>		Pended	Sale	04/21/2018	16:42	Bradford			K		M	10.50
<input type="checkbox"/>		Pended	Sale	04/21/2018	14:04	mike			K		M	10.50
<input type="checkbox"/>		Pended	Sale	04/21/2018	14:01	Gary			K		M	10.50
<input type="checkbox"/>		Pended	Sale	04/21/2018	07:36	JOY			K		M	10.50
<input type="checkbox"/>		Pended	Sale	04/21/2018	07:27	JOY			K		M	10.50
<input type="checkbox"/>		Pended	Sale	04/21/2018	07:20	JOY			K		M	10.50
<input type="checkbox"/>		Pended	Sale	04/21/2018	07:17	JOY			K		M	10.50
<input type="checkbox"/>		Pended	Sale	04/17/2018	10:52	Richard			K		M	0.21
<input type="checkbox"/>		Pended	Sale	04/17/2018	10:51	Richard			K		M	0.20

Transaction Count: 13 Net Amount: \$ 205.41 Display: 25

The Current Batches page provides access to your Pending, Declined, and Voided transactions. By clicking the Card Data, shown as an orange credit card number, you can view additional information about each item.

For each, you will see the Transaction ID, approval status, and reason (if declined). You can also void the transaction if necessary.

Voiding a Transaction:

If you a transaction is Pending, you can void it. If it has already settled, you can issue a refund.

A Void cancels the transaction. Funds won't be shown on the consumer's credit/debit card statement.

To void a transaction, locate which transaction you wish to void. If there is a Void button on the bottom, click it and follow the directions to complete. If there is no button, you must issue a refund instead.

Your Pending Transactions will settle at 12:00am. Settled transactions will appear on the Settled Batches page.

Current Batches Credit Card Response

This is the authorization response information. Note that all fields with an asterisk (*) are required.

Transaction Detail	
Authorization Results	
User:	
Payment Type:	CREDITCARD
Transaction Type:	SALE
Transaction ID:	230418A43-A5F3D155-BD04-4122-9925-0A08639695F6
Date / Time:	04/23/2018 11:54:01 AM
Response:	AA
Message:	APPROVAL
Approval Code:	03901C
AVS Response:	
ECT:	
CVV2 Response:	M
Account Balance:	0.00
Tran Reference Number:	423155400
CardHolder IP:	
Order Section	
Account Data:	*****
Expiration Date(MMY):	****
Amount:	10.50 *
Sales Tax:	
Invoice Number:	
Description:	
Billing Address	
Company:	
First Name:	David
Last name:	
Address1:	
Address2:	
City:	
State/Province:	
Postal Code:	
Country:	
Phone:	
Email Address:	
Update View Receipt View Products Void Cancel	



SETTLED BATCHES:

To view Settled Batches, click Settled Batches on the left menu, then click Main. You will see a page similar to this:

Settled Activity

Select the batch to review

Settled Batch Activity								Search
Batch#	Batch Response	Settled Date	Net Count	Net Amount	Number Purchase/Forces	Number Returns	Number Voids	
001	GB TEST DROPPED	2018-01-17 11:04:10	1	1.44	1	0	0	

Batch Count: 0 Net Amount: \$0.00 Display: 25



Settled Activity will show each day's batch and the settlement date and time. Every batch consists of the day's transactions, so if you received five payments, those five would appear on the report.

Note that batches can include Returns and Voids.

Click on the Settled Date to view the details for the batch.

Settled Activity

Select the batch to review

GB TEST DROPPED													Download Reports Reports Plus Search Filter: All
Seq#	User ID	Tran Status	Card Type	Tran Type	Tran Date	Tran Time	First Name	Last Name	Card Data	Entry Type	AVS Code	CVV2 Code	Total Amount
000	813297	Settled	Credit Card	Sale	01/17/2018	11:04			50*****3003	K			1.44

Transaction Count: 1 Net Amount: \$ 1.44 Display: 50

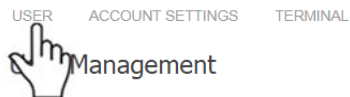


Refund Transaction:

To issue a refund, click the orange credit card number under Card Data. You will be presented with the details of the transaction. The Generate Refund button will be near the bottom. Once clicked, the transaction amount will be displayed. Leave it as is for a full refund or reduce the amount to issue a partial refund.

You will be notified if the refund was successful. If it was, the amount will settle and the funds returned to the consumer at 12:00am. It can take as long as 48 business hours for the amount to appear in their account.

Creating New Users:



User Management is designed to help you **Create Users**, which allows you to set up the access and permissions for your employees. The **Find/Edit User** allows you to locate your individual Users and access and edit information about them. The **Change Password** function allows you to change your own password.

- [Find / Edit](#)
- [Create New](#)
- [Change Password](#)
- [Change PIN](#)
- [Update Security Questions](#)

The User Management option at the top of the screen allows you to perform routine administrative functions relating to others who will have access to the account.

To create additional users, click on Create New. The page shown at the right will present.

Fields with a red asterisk are required, The Supervisor should be the main account. This is indicated by the lack of dashes in front of the User ID.

Provide the username and password to each respective administrator. For best practices, do not write down or email this information.

Once a user has been defined, you can establish their permissions by clicking the Rights button.

Unless you intend to allow a user the ability to add additional users, we recommend limiting their rights to the Virtual Terminal – Batch section. This will allow the user to access Current Batches and Settled Batches.

See the image below for the recommended rights to be grant to your new user.

USER ACCOUNT SETTINGS TERMINAL

Create New User

Complete all information and click Create at the bottom of the form to create a new user account. Note that all fields with an asterisk (*) are required.

A screenshot of a web form titled 'Enter New User Information'. The form has a header 'User Information' and contains the following fields: 'User ID:' (text input, red asterisk), 'Password:' (text input, red asterisk), 'Confirm Password:' (text input, red asterisk), 'First Name:' (text input), 'Last Name:' (text input), 'Location:' (text input), 'Phone:' (text input), 'Extension:' (text input), 'Email:' (text input, red asterisk), 'Active:' (dropdown menu with 'Yes' selected), and 'Supervisor:' (dropdown menu, red asterisk). At the bottom of the form are two buttons: 'Create User' and 'Clear'.

Edit User Rights

Update an existing user's rights

Update Rights for: test

Default Selection Options
[Dropdown] (You may still make individual selections)

Virtual Terminal - Transactions

<input type="checkbox"/> Credit Card-Sale	<input type="checkbox"/> Credit Card-Return	<input type="checkbox"/> Credit Card-Inquiry	<input type="checkbox"/> Credit Card-Force
<input type="checkbox"/> Credit Card-Auth Only	<input type="checkbox"/> Credit Card-AVS Only/Verification	<input type="checkbox"/> Credit Card-Recurring	<input type="checkbox"/> Credit Card-Installment
<input type="checkbox"/> Credit Card-Unencrypted Hand Key	<input type="checkbox"/> Credit Card-Multientry	<input type="checkbox"/> Credit Import Batch	<input type="checkbox"/> Recurring Import Batch
<input type="checkbox"/> Debit Card-Purchase	<input type="checkbox"/> Debit Card-Return	<input type="checkbox"/> Debit Card-Inquiry	
<input type="checkbox"/> Food Stamp-Purchase	<input type="checkbox"/> Food Stamp-Return	<input type="checkbox"/> Food Stamp-Inquiry	<input type="checkbox"/> Food Stamp-Force Purchase
<input type="checkbox"/> Food Stamp-Force Return			
<input type="checkbox"/> Cash Benefit-Purchase	<input type="checkbox"/> Cash Benefit-Inquiry		
<input type="checkbox"/> Electronic Check-Purchase	<input type="checkbox"/> Electronic Check-Multientry	<input type="checkbox"/> Electronic Check-Recurring	<input type="checkbox"/> Electronic Check-Installment
<input type="checkbox"/> Gift Card-Redemption	<input type="checkbox"/> Gift Card-Credit	<input type="checkbox"/> Gift Card-Inquiry	<input type="checkbox"/> Gift Card-Activation
<input type="checkbox"/> Gift Card-Reload	<input type="checkbox"/> Gift Card-Card Return		
<input type="checkbox"/> Loyalty Card-Enrollment	<input type="checkbox"/> Loyalty Card-Inquiry	<input type="checkbox"/> Loyalty Card-Redeem	<input type="checkbox"/> Loyalty Card-Points Issuance
<input type="checkbox"/> Loyalty Card-Return	<input type="checkbox"/> Loyalty Card-Member Inquiry		
<input type="checkbox"/> Cash-Sale	<input type="checkbox"/> Cash-Return		

Virtual Terminal - Batch

<input checked="" type="checkbox"/> Batches-View	<input checked="" type="checkbox"/> Batches-Void Delete	<input type="checkbox"/> Batches-Settle Transactions	<input checked="" type="checkbox"/> Batches-Edit Transactions
<input checked="" type="checkbox"/> Batches-Return Transactions	<input checked="" type="checkbox"/> Batches-View Settled History		

Virtual Terminal - Tokenization

<input type="checkbox"/> Generate Tokens	<input type="checkbox"/> Card Manager-View	<input type="checkbox"/> Card Manager-Add	<input type="checkbox"/> Card Manager-Edit
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User Management

<input type="checkbox"/> Find/Edit Users	<input type="checkbox"/> Create Subordinates	<input type="checkbox"/> Edit Terminal Associations	<input type="checkbox"/> Edit User Rights
<input type="checkbox"/> Edit Logon IP Address Options			

Terminal Management

<input type="checkbox"/> Edit Terminal Setup	<input type="checkbox"/> Edit Business Rule
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Virtual Terminal - Export Script

<input type="checkbox"/> Export Transactions
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Update Clear All Cancel

Editing Users:

You can edit users by going to Find/Edit, then clicking Find. A list of all users will present. It is important that you do not delete any users that were established by Xpress-pay, or transactions will be unable to process until they are replaced.

Changing Your Password:

Password changes are accomplished by clicking on the Change Password link on the User menu.

Change PIN:

Do not change the PIN. Doing so will result in terminate payment acceptance. Xpress-pay uses the PIN to communicate securely with the Converge Gateway as needed to submit payment transactions on your behalf.

Password Requirements:

Minimum of eight characters, one upper and lower-case letter, at least one number, one special character, no spaces allowed, and cannot match your last five passwords.

Additional Notes:

You will see other sections such as Account Settings and Terminal. Options in these sections have been preset so that your account can properly accept online payments. Changing any items in these areas risks disrupting your ability to accept payments.

If you need assistance with any aspect of navigating or altering settings in the Converge gateway, see below.

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