

PayeezySM Gateway Getting Started Guide



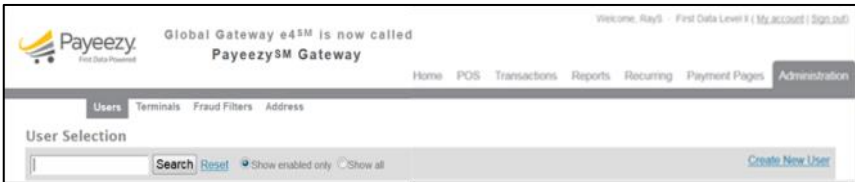
- Realtime Payment Manager
- Merchant Administrators
- Virtual POS Users

Login Page

- Login to the Real Time Payment Manager using the Temporary password provided in your Payeezy Gateway Welcome Email.
- If you have logged in previously, please use the password you set.

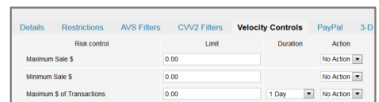
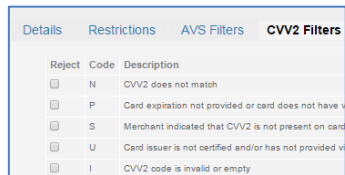
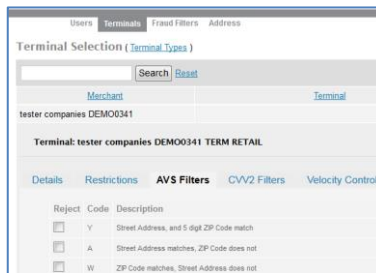
Merchant Administrator Functions

- Merchant Administrators control the payment processing environment
- Use the Administration section to create users and establish fraud and velocity settings



Fraud Filters, Address and Card Verification

- Gateway fraud features help protect your account from fraud and preventable chargebacks.
- Use the tools available in Velocity Controls to limit the number and types of transactions sent to Issuers
- AVS and CVV filters allow control of a transaction based on the response from the Issuer



Creating Users



Users can be created with specific roles and permissions, based on how they will be using the Gateway

Create a User

- On **Home Page** select **Administration, Users**
- Click **Create New User** Link
- Enter User's Name and Email. It is critical the

Select **Login** tab

- Enter Login information
- Select Status – Enabled or Disabled
- Enter Password
- Enter Confirmation

Specify User Permissions

1. Select Role

- **Read Only** - Access to all screens except POS.
- **POS** - Access to POS and *Transactions* only
- **Merchant** - Access to all screens. POS and transactional functions are operational

2. Select POS Permissions

- Select the transaction types you would like available to this user.
- It is a best practice to limit the transaction types to the fewest the user needs to complete their work.

Merchant/Terminal Restrictions

- Select **Merchant/Terminal Restrictions**
- **Select or Unselect** terminal associations
- Update the fields available for view.

Virtual POS User Functions

- Process Credit Card and eCheck transactions using the VPOS.

Enter a Credit Transaction

- The VPOS allows a MOTO operator to process several types of transactions.
- Click the **POS** tab on the menu bar to begin a transaction.
- Select **Transaction Type** – Purchase, Pre-Auth Completion, Void, Refund, Pre-Auth
- Enter Amount total, Customer's name, Customer Address and Card Verification Data

Enter an eCheck Transaction by clicking on the eCheck tab

Payeezy Global Gateway e4M is now called PayeezyM Gateway

Home POS Transactions Reports Repeating Payment Pages

Credit Quick Key

Enter a Transaction

Transaction Type: **Purchase**

Clear Amount: USD

Card holder's name:

Credit Card Number:

Expiry Date: 05/2015

[Process Transaction](#) [Clear](#)

Optional Fields

Reference Number:

Customer Reference:

Reference Number 3:

AVS:

Address:

Country:

Merchant Terminal Type:

Merchant Terminal Number:

AppleCard requires a merchant Terminal number for POS transactions

[Process Transaction](#) [Clear](#)

Credit Check

Enter a Transaction

Transaction Type: **Purchase**

Amount: USD

Check Details

Customer Name:

Check Number:

ABA/Bank Routing No.:

Bank Account Number:

Authorization Method: **PreArranged**

Check Type: **Personal**

ID Details: **Driver's License**

If using a driver's license as ID, please also include the state.

Email Address:

Country:

Establish a Recurring Payment

1. Select the **Recurring** tab
2. Select Create a Plan
3. Select Merchant
4. Select a Terminal
5. Input Plan Name
6. Enter Start Enter End Date
7. Choose Default Frequency
8. Check **Activated**

New Plan

Merchant: **FDC ConnectionShop CAD**

Default Terminal: **FDC ConnectionShop CAD Terminal 1**

Plan Name:

Comment:

Default Start Date: [Today](#)
(YYYY/MM/DD)

Default End Date: [Today](#)
(YYYY/MM/DD)

Default Frequency: **Once**

Activated:

Enable for Payment Page:

[Create](#) or [Cancel](#)

PayeezySM Gateway Getting Started Guide

Getting Started:

- Go to <https://support.payeezy.com> and visit the “Getting Started” section.
- Carefully follow instructions outlined in the Welcome Email to complete your account setup.



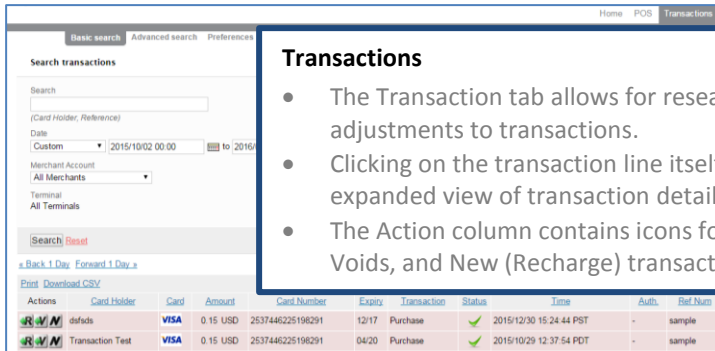
Global Gateway e4™ is now called PayeezySM Gateway

GETTING STARTED WITH PAYEEZY GATEWAY

What Happens Next? Getting Started with Payeezy Gateway
Helpful Links for Getting Started with Payeezy Gateway
Printable – Getting Started Quick Guide
More... See all 6 articles

Transactions

- The Transaction tab allows for research and adjustments to transactions.
- Clicking on the transaction line itself will result in an expanded view of transaction details.
- The Action column contains icons for Refunds, Voids, and New (Recharge) transactions



Home POS Transactions

Basic search Advanced search Preferences

Search transactions

Search
(Card Holder, Reference)
Date Custom 2015/10/02 00:00 to 2016
Merchant Account All Merchants
Terminal All Terminals

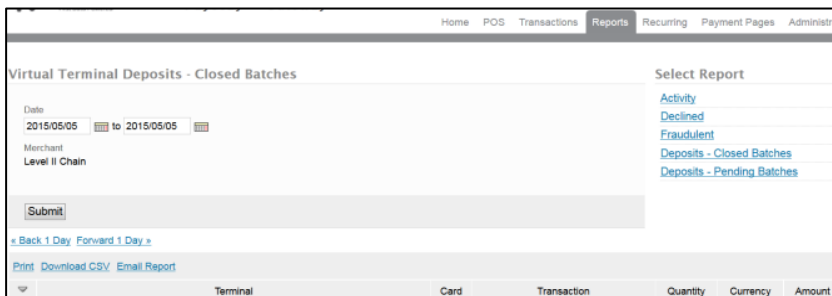
Search Reset

Back 1 Day Forward 1 Day

Print Download CSV

Actions	Card Holder	Card	Amount	Card Number	Expiry	Transaction	Status	Time	Auth.	Ref Num
	dfafds	VISA	0.15 USD	253744625198291	12/17	Purchase	✓	2015/12/30 15:24:44 PST	-	sample
	Transaction Test	VISA	0.15 USD	253744625198291	04/20	Purchase	✓	2015/10/29 12:37:54 PDT	-	sample

Reports Payeezy Gateway allows you to generate transactional reports.



Home POS Transactions Reports Recurring Payment Pages Administration

Virtual Terminal Deposits - Closed Batches

Date 2015/05/05 to 2015/05/05
Merchant Level II Chain

Submit

Back 1 Day Forward 1 Day

Print Download CSV Email Report

Terminal	Card	Transaction	Quantity	Currency	Amount
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Select Report

- Activity
- Declined
- Fraudulent
- Deposits - Closed Batches
- Deposits - Pending Batches

Deposits

To generate a report displaying batches

- Select report type - Closed Batches
- Specify the date and time
- Select Merchant Account
- Select group designation – Terminals or User Names

Activity

To generate a report displaying transactions

- Select report type – Activity, Declined, or Deposits
- Specify the date ranges
- Select a Merchant Account
- Select group designation – Terminals or User Names