

Converge

System Administration Guide

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Preface

This document describes step by step procedures on how to use your Converge including:

- Configure and manage users
- Configure and manage account settings
- Configure your terminal and payment fields

This document is intended for all users of the Converge product and contains the information necessary for you to be able to use all the features of the product effectively.

Typographical Conventions

Throughout this guide, you will see words and phrases that appear in different fonts and formats. The following list describes the typographical conventions used in this guide.

- **Bold text**

Indicates a menu option, a window title, buttons, and so on that you can use to identify a part of the user interface.

Examples:

Print or **Save As** dialog box

- **Menu selection sequences**

Indicates a series of menu options that you need to select in a particular sequence and listed in one step. Each menu option is separated by a pipe (|).

1. Choose **File | Save As | File Name** and enter the name of the document.

- **Courier text**

Indicate examples of software code. Usually this type of text is encapsulated in a code box as illustrated below.

```
Begin Header
<head>
  <title>Batch Import</title>
</head>
End Header
```

- **Bold courier text**

Indicates a command that you would type into a command prompt window as illustrated below.

```
cd c:\users\
```

- **Italicized text**

Indicates that the word or phrase is:

- A reference to another document as illustrated below.

Refer to the Elavon User Guide.

- Emphasized for clarification as illustrated below.

You *do not* need to select **Apply**.

- The word is replacement text, such as a variable for a piece of code that you need to enter the appropriate value for your implementation as illustrated below.

```
<xml>  
<country_code>Country Code</country_code>  
</xml>
```


Related Documentation

The following documents are available related to the Converge product.

- Converge Getting Started Guide
- Converge Transaction Processing Guide
- Converge Chip and PIN (EMV) Transaction Processing Addendum
- Converge Peripheral Device Installation and Setup Guide
- Converge Developer Guide

Revision History

The following table provides a description of the changes made to this document from its origination to the current release.

Revision	Date	Revision Notes
A	SEP-2014	Original release of the Converge System Administration Guide
B	NOV-2014	Enhancement of password requirements
C	MAR-2015	Addition of new peripheral devices
D	NOV-2015	Setup changes for the new peripheral devices

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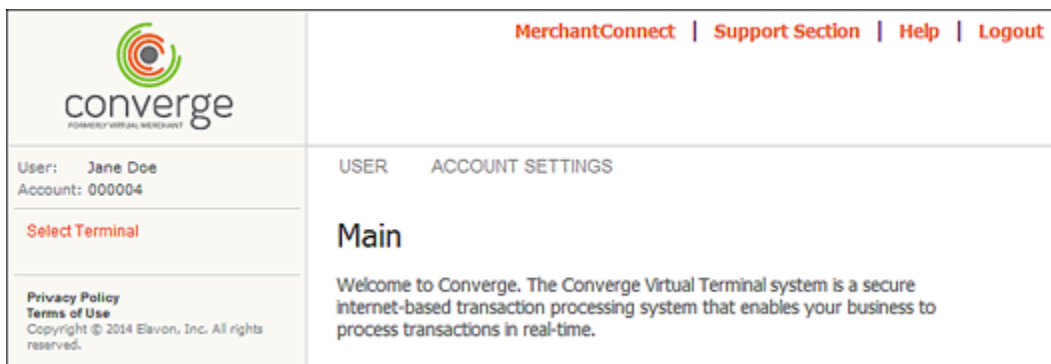
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Chapter 1: Configuration Menu Options

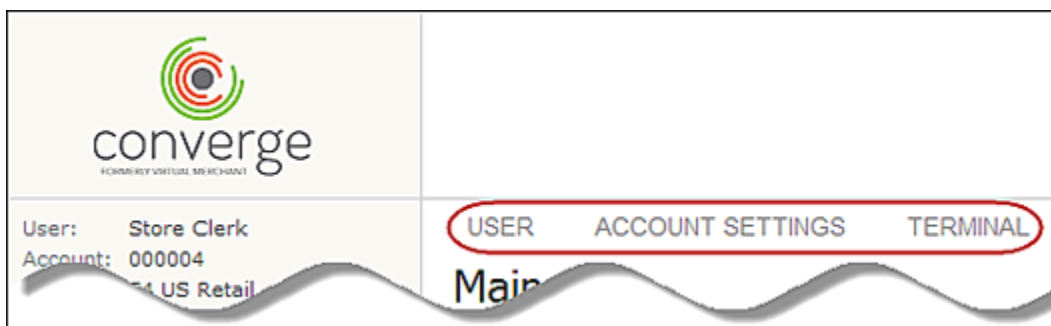
When you launch Converge, the **Main** screen displays. Components of the Converge interface include:

- Support Menu Options (Refer to the *Converge Getting Started Guide*)
- Configuration Menu Options
- Transaction Menu Options (Refer to the *Converge Getting Started Guide*)



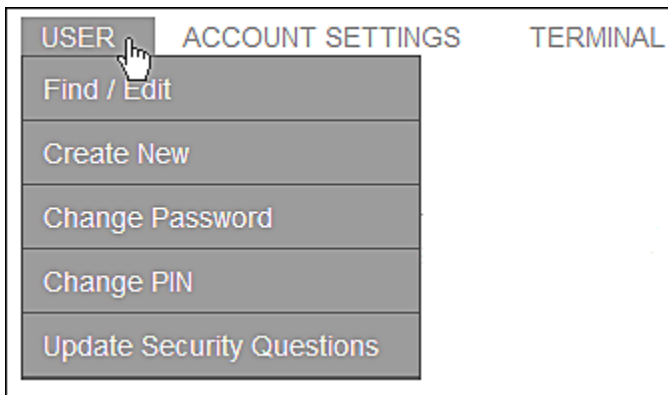
The **Configuration Options** contain the following menus:

- User
- Account Settings
- Terminal



User Menu

User management is designed to help you create users, which allows you to set up the access and permissions for your employees. To access the **User** menu options, click **User**.

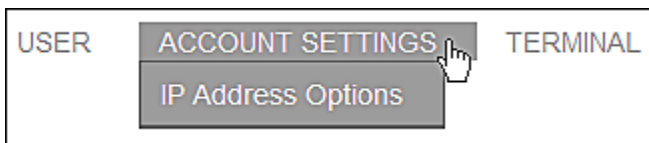


The following options are available:

- **Find/Edit**
Allows you to locate your individual users and access and edit information about them
- **Create New**
Allows you to create a new user account
- **Change Password**
Allows you to change your own password
- **Change PIN**
Allows you to enter a new PIN
- **Update Security Questions**
Allows you to confirm your password, select desired questions and provide answer to each

Account Settings Menu

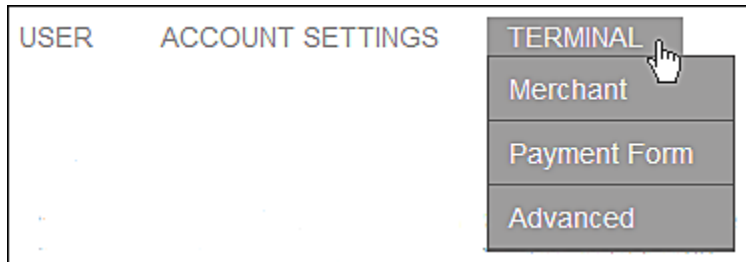
Account Settings management is designed to help you set specific account level checks. To access the **Account Settings** menu option, click **Account Settings**.



There is only one option available, **IP Address Options**. This allows you to configure IP checks for your existing accounts.

Terminal Menu

The **Terminal** menu displays after you have selected a terminal. To access the **Terminal** menu options, click **Terminal**.



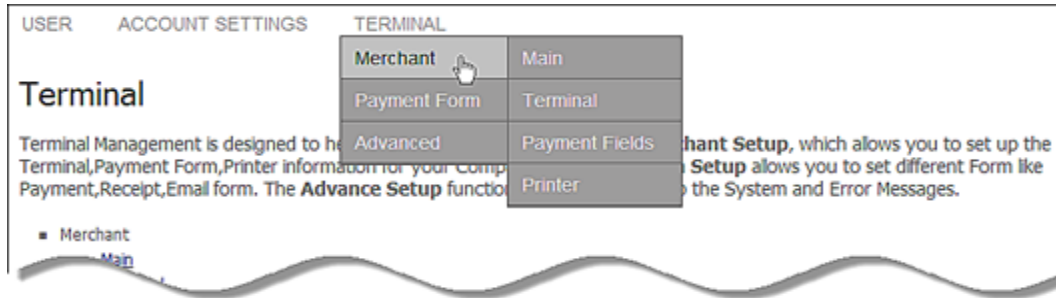
Terminal management is designed to help you with the following configurations:

- **Merchant (Merchant Setup)**
Allows you to set up the terminal, payment form and printer information for your company
- **Payment Form (Payment Form Setup)**
Allows you to set up various forms
- **Advanced (Advanced Setup)**
Allows you to set up the system and error messages

Terminal management menu items are further divided into submenus as follows:

Merchant (Merchant Setup)

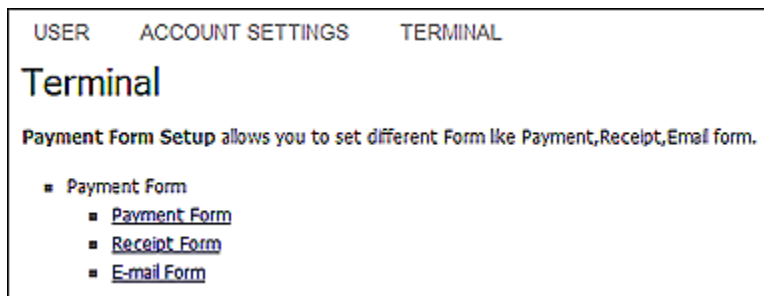
The **Merchant** (Merchant Setup) menu consists of:



- **Main**
Allows you to view and edit merchant information
- **Terminal**
Allows you to view the set up information for a terminal
- **Payment Fields**
Allows you to create or modify the fields that appear on payment forms
- **Printer**
Allows you to configure the receipt printing options

Payment Form Menu

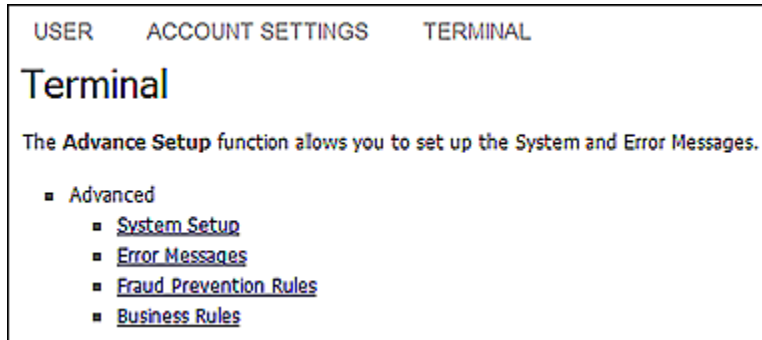
The **Payment Form** menu configuration consists of:



- **Payment Form**
Allows you to add custom headers and footers, define color and attach images to be displayed on the payment form
- **Receipt Form**
Allows you to define payment receipt form options
- **E-mail Form**
Allows you to setup approved and declined email notification options

Advanced Menu

The **Advanced** menu configuration consists of:



- **System Setup**
Allows you to designate HTTP referral, specify settlement window, enable signature capture device and setup an export script
- **Error Messages**
Allows you to define custom error messages to appear in the payment form
- **Fraud Prevention Rules**
Customizable set of rules that allow you to build constraints to match your business needs and control how you handle transactions that include the ability to approve or decline transactions or return an error
- **Business Rules**
Allows you to define custom rules for terminal-based transactions

Chapter 2: Managing Users

This chapter provides information about how to manage users, including the following:

- Create new users
- Find user accounts
- Edit user accounts
- Edit user terminal associations
- Generate user reports
- Change passwords
- Change PINs
- Update security questions

Creating a New User

To access a Converge account, you must be added to the system as an authorized user. The **Merchant Administrator** for an account controls the entire account and is allowed to:

- Create users (single users and multiple users who can log in and process transactions simultaneously)
- Create hierarchy of users with similar or varying degrees of permissions and access
- Delegate the ability to manage a hierarchy of users to another user

When you have a **Merchant Administrator** to control these functions, you can manage efficiently and create a system of accountability.

Note: We suggest that you create one or more separate users to manage day-to-day activities, including but not limited to: processing transactions, reviewing transactions, and settling transactions. It is strongly recommended that you keep your **Merchant Administrator** user account dedicated to administrative functions only.

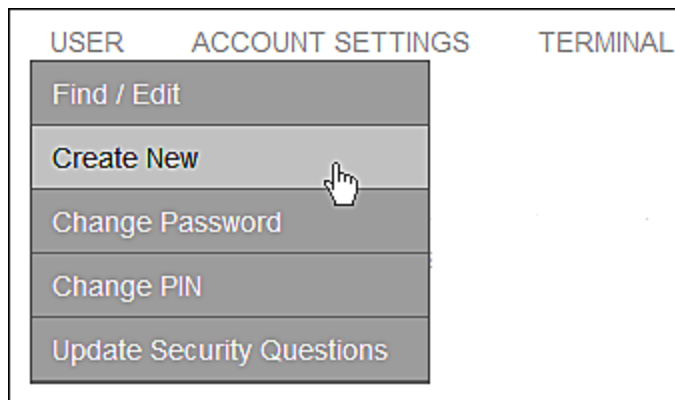
Follow these procedures to create a user account:

- Create new user account
- Assign new user rights
- Add terminal associations to the user profile
- Create new user account from existing user profile
- Copy terminal associations to a new user

To Create New User Accounts

To create a new user account follow these steps:

1. Select **User | Create New**.



The **Create New User** screen displays.

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.

Enter New User Information

User Information

User ID: *

Password: *

Confirm Password: *

First Name:

Last Name:

Location:

Phone:

Extension:

Email: *

Active:

Supervisor: *

Notes:

- All fields with an asterisk are required.
- Refer to the **Password Requirements** section in the *Converge Getting Started Guide* for password requirements information.

2. Enter the user's **User ID**.
3. Enter the user's **Password**.
4. Re-enter the user's password in the **Confirm Password** field.

Note: The next five fields are not required, but you can enter this information for the user if you wish: **First Name**, **Last Name**, **Location**, **Phone** number, and phone **Extension**.

5. Enter the user's **Email** address.

6. Select **Yes** or **No** from the drop-down list to indicate if **Active**.

Examples of new users who would not be active would be new hires that have not yet started work or employees out on medical leave. This field is set to **Yes** by default.

7. Select **Supervisor** from the drop-down list.

Note: The default **Supervisor** is the current user's **Supervisor** or the **Merchant Administrator**, if the user logged in is the **Merchant Administrator**.

8. Click **Create User** to add the new user account.

The **New User Confirmation** screen displays the fields that you entered on the **Create New User** screen along with a message to confirm that the user ID added successfully.

New User Confirmation

This page is used to confirm the new user information.

Clerk1 - Added successfully.

New User

User Information	
User ID:	Clerk1
First Name:	Jane
Last Name:	Doe
Location:	Any City
Phone:	999-999-9999
Extension:	
Email:	Any_email@email.com
Active:	Active
Supervisor:	Manager

Rights **Terminals**

Note: Click Clear to clear all data entered on the **Create New User** screen.

To Assign Rights to a User

User rights are specific access and permissions granted to a user. To assign rights to a user follow these steps:

1. On the **New User Confirmation** screen, click **Rights**.

New User Confirmation

This page is used to confirm the new user information.

Clerk1 - Added successfully.

New User

User Information

User ID:	Clerk1
First Name:	Jane
Last Name:	Doe
Location:	Any City
Phone:	999-999-9999
Extension:	
Email:	Any_email@email.com
Active:	Active
Supervisor:	Manager

Rights

Terminals

The **Edit User Rights** screen displays.

The screenshot shows the 'Edit User Rights' window for user 'Clerk1'. The window has a title bar 'Update Rights for: Clerk1'. Below the title bar is a section 'Default Selection Options' with a dropdown menu and the text '(You may still make individual selections)'. The main area is titled 'Virtual Terminal - Transactions' and contains a grid of checkboxes for various transaction types: Credit Card-Sale, Credit Card-Return, Credit Card-Inquiry, Credit Card-Force, Credit Card-Auth Only, Credit Card-AVS Only/Verification, Credit Card-Recurring, Credit Card-Installment, Credit Card-Multientry, Credit Card-Debit, and Debit Card. Below this grid is a section 'Export Transactions' with a checkbox 'Export Transactions'. At the bottom of the window are three buttons: 'Update', 'Clear All', and 'Cancel'.

Edit User Rights

Update an existing user's rights

Update Rights for: Clerk1

Default Selection Options

(You may still make individual selections)

Virtual Terminal - Transactions

☐ Credit Card-Sale ☐ Credit Card-Return ☐ Credit Card-Inquiry

☐ Credit Card-Force ☐ Credit Card-Auth Only ☐ Credit Card-AVS Only/Verification

☐ Credit Card-Recurring ☐ Credit Card-Installment ☐ Credit Card-Multientry

☐ Credit Card-Debit ☐ Debit Card

☐ Export Transactions

Level 3

☐ Level 3

Update Clear All Cancel

Note: The user rights that display in this window are dependent on the user rights of the user currently logged in. You cannot grant a right to a subordinate unless your profile has the right to do so.

2. In the **Default Selection Options** drop-down list, select one of the following:

- Standard
- Manager
- Administrator

Notes:

- The default is a blank value. No options are selected.
 - When you select either **Standard**, **Manager** or **Administrator**, you still have the option to manually select and de-select user rights.
 - The rights within each section are described in the **Glossary** section of the *Converge Getting Started* Guide.
-

If you selected **Standard**, the system selects all rights with the exception of the following:

- Rights within the **Virtual Terminal-Transactions** section associated with any **Return**, **Credit**, **Activation**, **Reload**, and **Import Batch** transaction types
- Rights within the **Virtual terminal – Tokenization** section
- Rights within the **Virtual Terminal-Batch** section
- Rights within the **Virtual Terminal-Export Script** section
- Rights within the **User Management** section
- Rights within the **Terminal Management** section

If you selected **Manager**, the system selects all rights with the exception of the following:

- Rights within the **User Management** section
- Rights within the **Terminal Management** section
- Rights for the **Virtual Terminal-Export Script** for the manager

If you selected **Administrator**, the system selects all rights.

Note: If you click **Cancel**, the window closes and the user rights that were selected are not updated. If you click **Clear All**, all the users rights will be reset (unchecked).

3. Click **Update**.

The **New User Confirmation** screen displays a message that the rights for that user ID updated successfully.

New User Confirmation

This page is used to confirm the new user information.

Clerk1 - Rights Updated successfully.

New User

User Information	
User ID:	Clerk1
First Name:	Jane
Last Name:	Doe
Location:	Any City
Phone:	999-999-9999
Extension:	
Email:	Any_email@email.com
Active:	Active
Supervisor:	Manager

Rights **Terminals**

Notes:

- The **Default Selection Options** (such as **Manager**) are not saved with the user rights. This pre-set saves you time and allows you not to have to click each user right individually.
 - The rights are not saved until you click the **Update** button.
-

To Add Terminal Associations to a User Profile

When you add a new user, you have to specify the terminals to which the user's login provides access.

1. On the **New User Confirmation** screen, click **Terminals**.

The **Terminal Associations** screen displays.

Terminal Associations

Enter a new terminal association

Terminal Associations for: Clerk1

User	Terminal Name	Terminal ID	Market	PIN	PIN Length	PIN Format
------	---------------	-------------	--------	-----	------------	------------

Terminal List - 9 items

Friendly Name	Terminal ID
ABC Company	8888889999900000888888
E4 CAN INTERNET	0089250008021901387000
E4 CAN MOTO	0089250008021901395000
E4 CAN RETAIL	0089250008021901381000
E4 CAN SERVICE	0089250008021901379000
E4 US Internet	001734080219012880000
E4 US MOTO	0089250008021902526000
E4 US Retail	0017340009997772229998
E4 US SERVICE	0017340009997772229997

Display: 25

Edit User **Copy Associations From Other User**

2. Select the terminal you wish to add to the user profile from the list.

The screen updates showing the terminal association and displays a message that the terminal added successfully.

Terminal Associations

Enter a new terminal association

000000000000000000000000 - Added successfully.

User	Terminal Name	Terminal ID	Market	PIN	PIN Length	PIN Format	
Clerk1	ABC Company	000000000000000000000000	Internet	KRQD6R1\$5WLBT0F8BY0XDVGOOL\$AGBNKRLRY\$PDCR1FLBTGXCUCOGGQ1SWC7Y3	64	alphanumeric	Change PIN Delete

Terminal List - 8 items

Friendly Name	Terminal ID
E4 CAN INTERNET	00002500000021901307000
E4 CAN WOTD	00002500000021901300000
E4 CAN RETAIL	00002500000021901301000
E4 CAN SERVICE	00002500000021901379000
E4 US Internet	001734000219012000000
E4 US WOTD	00002500000021900250000
E4 US Retail	001734000990772229900
E4 US SERVICE	001734000990772229907

Display: 25

Edit User Copy Associations From Other User

Note: For each new terminal association, a new PIN is automatically generated. The new PIN can be used to process transactions from an integrated application, a Web site, or the Converge Mobile App. PINs can be 64, 32, 6, 5 or 4 characters in length. It is recommended to always use a length of 64 characters for maximum security.

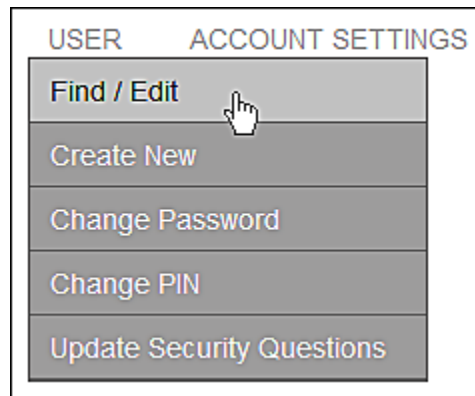
3. To associate an additional terminal to the user account, select another terminal from the **Terminal List**.
4. To replicate the terminal associations from another user, click **Copy Associations From Other User**.

Note: If terminals are already associated to the user a message will appear that all existing terminal associations for the user will be removed and replaced with the terminal associations from the selected user.

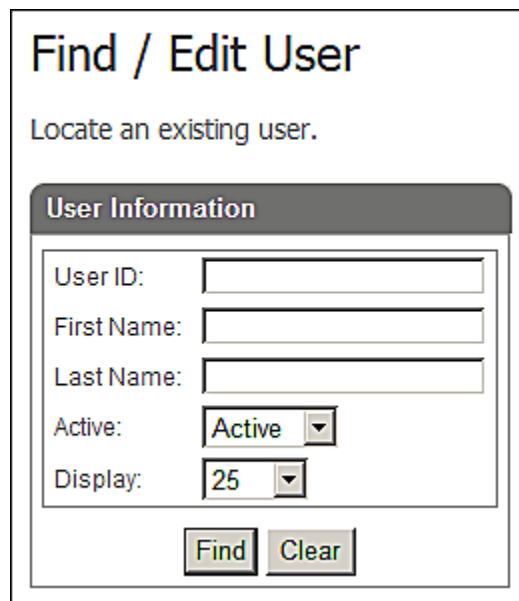
To Create New User Account from Existing User Profile

This feature allows you to create a new standard user profile from an existing standard user profile. You must have **Create Subordinates** user rights and the standard user profile that will be copied to create the new standard user profile must exist.

1. Select **User | Find/Edit**.



The **Find/Edit User** screen displays.

A screenshot of the 'Find / Edit User' screen. The title 'Find / Edit User' is at the top. Below it is the instruction 'Locate an existing user.' There is a section titled 'User Information' containing several input fields: 'User ID:', 'First Name:', 'Last Name:', 'Active:' (with a dropdown menu showing 'Active'), and 'Display:' (with a dropdown menu showing '25'). At the bottom of this section are two buttons: 'Find' and 'Clear'.

2. Enter the relevant information in the search fields to choose an existing standard user profile or leave blank to find all users.
3. Click **Find**.

The **User List** search results table displays the users defined by the search.

Find / Edit User

Locate an existing user.

User Information

User ID:

First Name:

Last Name:

Active:

Display:

User List

Download

6 items

<input type="checkbox"/>	User ID	First Name	Last Name	Location	Supervisor	Active
<input type="checkbox"/>	Clerk1	Jane	Doe	Any City	Manager	Y
<input type="checkbox"/>	StoreClerk	Store	Clerk	Atlanta	000004	Y
<input type="checkbox"/>	StoreClerk2				000004	Y
<input type="checkbox"/>	SupermartClerk2				000004	Y
<input type="checkbox"/>	SupermartClerk3				000004	Y
<input type="checkbox"/>	SupermartClerk5				000004	Y

- Select the check box next to the user profile you wish to copy.

Note: You *cannot* choose more than one user profile.

- Click **Copy User**.

The **Copy User** screen displays.

Copy User

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

Enter New User Information

User Information

Account ID: 000004 *

User ID: *

Password: *

Confirm Password: *

First Name:

Last Name:

Location:

Phone:

Extension:

Email: *

Active: Yes

Supervisor: Manager *

Copy User Clear

Account ID is pre-populated with the account ID of the existing user profile and cannot be changed.

6. Enter new **User ID**.
7. Enter **Password**.
8. Re-enter password in the **Confirm Password** field.

Note: The next five fields are not required, but you can enter this information for the user if you wish: **First Name**, **Last Name**, **Location**, **Phone** number, and phone **Extension**.

9. Enter **Email** address.
10. Select **Yes** or **No** from the drop-down list to indicate if **Active**.
11. Select **Supervisor** from the drop-down list.

12. Click **Copy User** to add the new user account.

The **New User Confirmation** screen displays and a new user profile is created with the same rights, terminal associations, account and **Supervisor** as the existing user profile.

New User Confirmation

This page is used to confirm the new user information.

Clerk2 - Added successfully.

New User

User Information

User ID:	Clerk2
First Name:	Jane
Last Name:	Smith
Location:	Any City
Phone:	999-999-9999
Extension:	
Email:	AnyEmail@email.com
Active:	Active
Supervisor:	Manager

Rights

Terminals

Note: The **Copy User** button is disabled when there are 5,000 users for the account (VID).

Converge also does the following:

- Validate that there are less than 5,000 active users for the account ID (VID).
- Generate a new PIN for each terminal association created on the new user profile.
- If less than 5,000, create a new standard user profile with:
 - Only the user rights from the existing standard user profile that the logged in user already has.
 - Only the terminal associations from the existing standard user profile that the logged in user already has access to except for the PIN.
 - A status of **Unlocked**.

You may choose to update the rights and/or the terminal associations for the new standard user just created.

Notes:

- Rights can be copied from existing user profiles that are **Active** or **Not Active**.
 - Rights can be copied from existing user profiles with a status of **Locked** or **Unlocked**.
 - Uses the same security features that currently exist, which includes users only being allowed to add terminals to a user profiles that the logged in user already has access.
 - The user rights have the same restrictions.
 - Users cannot change the pre-populated **Account ID** field.
-

To Copy Terminal Associations to a New User

This feature allows you to copy the terminal associations from an existing user profile to the new user profile. You must have **Edit User Rights** and **Edit Terminal Associations** rights. The user profile from which the terminal associations are to be copied and the new user profile to which the terminal associations are to be copied must exist.

Note: All existing terminal associations for the user profile will be removed and replaced with the new associations. A new PIN is generated for each terminal including existing (shared) terminals. If you are using an integrated application, you must update your terminals with the new PINs to prevent interruption of service.

1. On the **New User Confirmation** screen, click **Terminals**.

Note: Refer to the [To Create New User Account from Existing User Profile](#) section and select an existing user profile from which the terminal associations are to be copied.

The **Terminal Associations** screen displays.

Terminal Associations

Enter a new terminal association

Terminal Associations for: Clerk1

User	Terminal Name	Terminal ID	Market	PIN	PIN Length	PIN Format
------	---------------	-------------	--------	-----	------------	------------

Terminal List · 9 items

Friendly Name ↕	Terminal ID ↕
ABC Company	88888899999000088888
E4 CAN INTERNET	0089250008021901387000
E4 CAN MOTO	0089250008021901395000
E4 CAN RETAIL	0089250008021901361000
E4 CAN SERVICE	0089250008021901379000
E4 US Internet	001734080219012880000
E4 US MOTO	0089250008021902526000
E4 US Retail	0017340009997772229998
E4 US SERVICE	0017340009997772229997

Display: 25 ▾

[Edit User](#) [Copy Associations From Other User](#)

2. Click **Copy Associations From Other User** to copy the terminal associations from the selected existing user to the new user.

The **Copy Terminal Associations** screen displays a list of existing users from which to select.

Copy Terminal Associations

Select one User Profile from which terminal associations will be copied

User Information

User ID:

First Name:

Last Name:

Active:

Active

Display:

25

Find

Clear

User List

• 7 items

<input type="checkbox"/>	User ID	First Name	Last Name	Location	Supervisor	Active
<input type="checkbox"/>	Clerk1	Jane	Doe	Any City	Manager	Y
<input type="checkbox"/>	Clerk2	Jane	Smith	Any City	Manager	Y
<input type="checkbox"/>	StoreClerk	Store	Clerk	Atlanta	000004	Y
<input type="checkbox"/>	StoreClerk2				000004	Y
<input type="checkbox"/>	SupermartClerk2				000004	Y
<input type="checkbox"/>	SupermartClerk3				000004	Y
<input type="checkbox"/>	SupermartClerk5				000004	Y

Copy Terminal Associations

Cancel

Note: If terminals are already associated to the user a message will appear that all existing terminal associations for the user will be removed and replaced with the terminal associations from the selected user.

3. Select the existing user profile and then click **Copy Terminal Associations**.

Converge does the following:

- Copies the terminal associations from the selected existing user to the user profile.
- Displays the **Terminal Associations** screen for the user profile with all terminal associations copied from the existing user.
- Generates a new PIN for each terminal association copied to the new user profile.
- Displays the terminal associations copied to the new user profile.

Notes:

Converge can do the following:

- Copy to existing user profiles that are **Active** or **Not Active**.
- Copy from existing user profiles that are **Active** or **Not Active**.
- Copy to existing user profiles with a status of **Locked** or **Unlocked**.
- Copy from existing user profiles with a status of **Locked** or **Unlocked**.
- Copy from only one existing user profile.
- Use the same security features that currently exist, which includes users only being allowed to add terminals to a user that the logged in user already has access to.

Finding a User Account

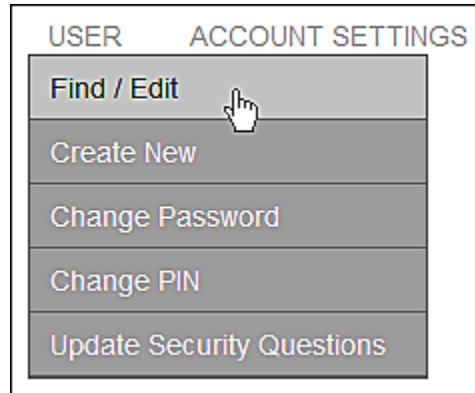
Sometimes it becomes necessary to modify users' accounts after they are granted access to the application. Converge allows you to search for existing user profiles. Each field is partial-search capable, which means you can use only the first letter or first few letters of your search criteria to search fields. The search is not case-sensitive (so DEBBIE, Debbie or debbie are all the same for search purposes). You can use a single field or multiple fields to narrow your search.

The **Find/Edit User** function allows you to do the following:

- Locate subordinate users and peers
- Change the sort order of the search results

To Locate a User Account

1. Select **User | Find/Edit**.



The **Find/Edit User** screen displays. The **Find/Edit User** function allows the currently logged in user to locate and manage all of their subordinate users and peers. This function is also a user right that can be enabled or disabled for each user.

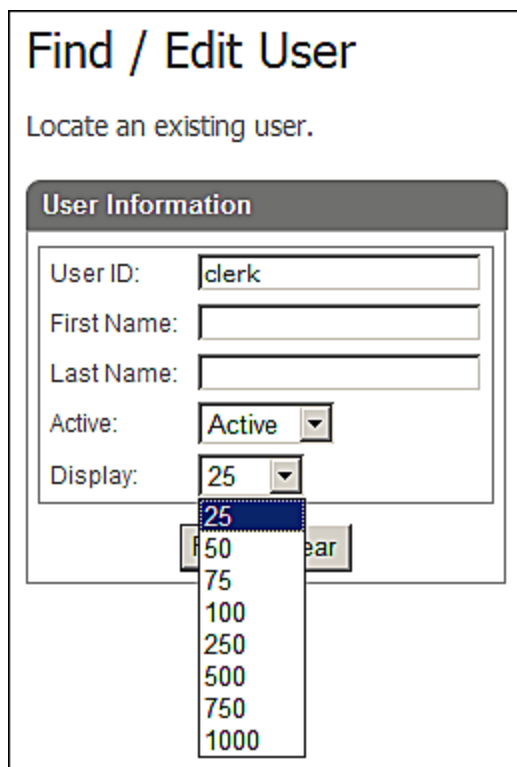
A screenshot of the 'Find / Edit User' screen. At the top, the title 'Find / Edit User' is displayed. Below the title is the instruction 'Locate an existing user.' A section titled 'User Information' contains several input fields: 'User ID:', 'First Name:', 'Last Name:', 'Active:' (with a dropdown menu showing 'Active'), and 'Display:' (with a dropdown menu showing '25'). At the bottom of the section are two buttons: 'Find' and 'Clear'.

2. Enter the relevant information in the search fields or leave blank to find all users.

The four search criteria fields are:

Search Field	Description
User ID	Searches for all user IDs that match the first characters entered in this field.
First Name	Searches for all first names that match the first characters entered in this field.
Last Name	Searches for all last names that match the first characters entered in this field.
Active	Searches for active, inactive or all users based on the selection.

3. In the **Display** drop-down, select the number of records you want to be shown at a time.



Find / Edit User

Locate an existing user.

User Information

User ID:

First Name:

Last Name:

Active:

Display:

Note: The **Display** drop-down list allows you to view users on screen in increments of 25, 50, 75, 100, 250, 500, 750 or 1,000. This feature allows your browser to work more efficiently. You get faster results when more items display per page.

4. Click **Find**.

The **User List** search results table displays all users defined by the search.

Find / Edit User

Locate an existing user.

User Information

User ID:
First Name:
Last Name:
Active:
Display:

User List

6 items

<input type="checkbox"/>	User ID ↕	First Name ↕	Last Name ↕	Location ↕	Supervisor ↕	Active ↕
<input type="checkbox"/>	Clerk1	Jane	Doe	Any City	Manager	Y
<input type="checkbox"/>	StoreClerk	Store	Clerk	Atlanta	000004	Y
<input type="checkbox"/>	StoreClerk2				000004	Y
<input type="checkbox"/>	SupermartClerk2				000004	Y
<input type="checkbox"/>	SupermartClerk3				000004	Y
<input type="checkbox"/>	SupermartClerk5				000004	Y

The search results table displays the **User ID**, **First Name**, **Last Name**, **Location**, **Supervisor** and indicates if the user is **Active** or not. The headings allow you to find and access users' accounts quickly.

Column Headers	Description
User ID	This column displays the user IDs that match the search criteria. This field is a hyperlink that links to the Edit User screen with the selected user's information displayed there.
First Name	This column displays the first names of the user IDs that match the search criteria.
Last Name	This column displays the last names of the user IDs that match the search criteria.

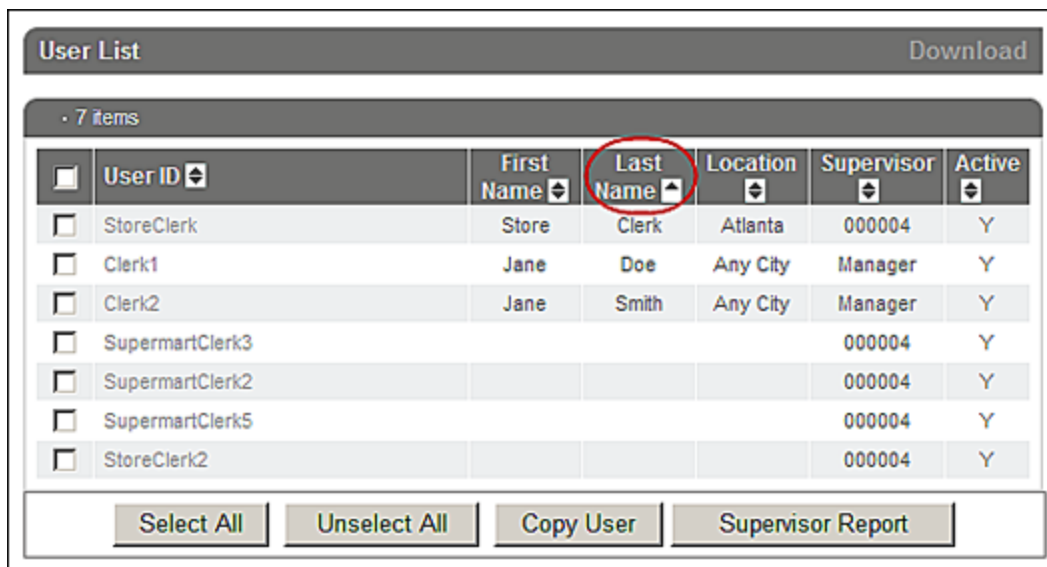
Column Headers	Description
Location	This column displays the locations of the user IDs that match the search criteria.
Supervisor	This column displays the Supervisors of the user IDs that match the search criteria.
Active	This column displays the statuses of the user IDs that match the search criteria. If the user ID is active, the letter Y for yes displays in the column. If the user ID is inactive, the letter N for no displays in the column.

Note: If you do not define any search criteria and click **Find**, the system displays all current user's peers and subordinates.

To Sort Search Results

As mentioned in the note above, if you do not define any search criteria and click **Find**, the system displays all current user's peers and subordinates.

To change the sort order of the search results table, click any of the six column headers of the search results table.



User List Download						
• 7 items						
<input type="checkbox"/>	User ID	First Name	Last Name	Location	Supervisor	Active
<input type="checkbox"/>	StoreClerk	Store	Clerk	Atlanta	000004	Y
<input type="checkbox"/>	Clerk1	Jane	Doe	Any City	Manager	Y
<input type="checkbox"/>	Clerk2	Jane	Smith	Any City	Manager	Y
<input type="checkbox"/>	SupermartClerk3				000004	Y
<input type="checkbox"/>	SupermartClerk2				000004	Y
<input type="checkbox"/>	SupermartClerk5				000004	Y
<input type="checkbox"/>	StoreClerk2				000004	Y

Note: The first click on a header sorts the data in alphabetical order from A to Z. The sort order reverses if you click the column header twice.

Editing a User Account

The **Edit User** screen allows you access to basic information for a specific user account. You can modify a single field or multiple fields simultaneously for a user.

To edit a user account, you may have to do one or more of the following:

- Find user accounts
- Edit user information
- Edit user rights
- Edit user terminal associations

To Edit User Information

1. Find the user you want to edit by following the instructions under the [Finding a User Account](#) section.
2. Click the **User ID** you want to edit in the **User List** table.

User List							Download
• 6 items							
<input type="checkbox"/>	User ID	First Name	Last Name	Location	Supervisor	Active	
<input type="checkbox"/>	Clerk1	Jane	Doe	Any City	Manager	Y	
<input type="checkbox"/>	StoreClerk	Store	Clerk	Atlanta	000004	Y	
<input type="checkbox"/>	StoreClerk2				000004	Y	
<input type="checkbox"/>	SupermartClerk2				000004	Y	
<input type="checkbox"/>	SupermartClerk3				000004	Y	
<input type="checkbox"/>	SupermartClerk5				000004	Y	
<input type="button" value="Select All"/> <input type="button" value="Unselect All"/> <input type="button" value="Copy User"/> <input type="button" value="Supervisor Report"/>							

The **Edit User** screen displays.

Edit User

Update an Existing User. Note that all fields with an asterisk (*) are required.

Update

User Information

User ID:	Clerk1
First Name:	Jane
Last Name:	Doe
Location:	Any City
Phone:	999-999-9999
Extension:	
Email:	Any_email@email.com *
Password:	***** *
Supervisor:	Manager
Active:	Yes
Status:	Unlocked

Update **Rights** **Terminals** **Update and Reset Security Questions** **Cancel**

3. Make the desired changes to the selected user:

User Fields	Description
User ID	Displays the user ID for the selected user. This value cannot be edited.
First Name	Enter or change the user's first name.
Last Name	Enter or change the user's last name
Location	Enter or change the user's location.
Phone	Enter or change the user's phone number.
Extension	Enter or change the user's phone extension.
Email	Enter or change the user's e-mail address. This field is required.

User Fields	Description
Password	Change the selected user's password. Refer to the Password Requirements section in the <i>Converge Getting Started Guide</i> for more information about how to change the password according to the system requirements. This field is required.
Supervisor	Change the Supervisor of the selected user.
Active	Activate or deactivate the selected user ID. Note: You can have a maximum of 5,000 active users associated with an account (VID). If you attempt to add a user to an account that already has 5,000 active users, the system will display an error message and you will not be allowed to add the user. You must deactivate a user from the system to lower the total number of active users.
Status	Lock or unlock a user's ability to login.
Update button	Saves changes.
Rights button	Configures the options that this user can access.
Terminals button	Adds terminal associations to the currently selected user.
Cancel button	Abandons changes.

4. Click **Update** to save the changes.

The **Edit User** screen closes and **Find/Edit** screen displays a message that the user information updated successfully.

Find / Edit User

Locate an existing user.

Clerk1 - Updated successfully.

User Information

User ID:

First Name:

Last Name:

Active:

Display:

User List

Download

• 7 items

<input type="checkbox"/>	User ID	First Name	Last Name	Location	Supervisor	Active
<input type="checkbox"/>	Clerk1	Jane	Doe	Any City	Manager	Y
<input type="checkbox"/>	Clerk2	Jane	Smith	Any City	Manager	Y
<input type="checkbox"/>	StoreClerk	Store	Clerk	Atlanta	000004	Y
<input type="checkbox"/>	StoreClerk2				000004	Y
<input type="checkbox"/>	SupermartClerk2				000004	Y
<input type="checkbox"/>	SupermartClerk3				000004	Y
<input type="checkbox"/>	SupermartClerk5				000004	Y

Note: Click the **Update** button to save changes made to the **Edit User** screen by before you select either the **Rights** or **Terminals** button. If not, the changes will be lost.

To Edit User Rights

You may include one or more of the following to edit user rights:

- Find the user account
- Add user rights
- Remove user rights

To Add User Rights

1. Find the user you want to edit by following the instructions under the [Finding a User Account](#) section.
2. Click the **User ID** in the **User List** table.

User List						Download
• 6 items						
<input type="checkbox"/>	User ID ▾	First Name ▾	Last Name ▾	Location ▾	Supervisor ▾	Active ▾
<input checked="" type="checkbox"/>	Clerk1	Jane	Doe	Any City	Manager	Y
<input type="checkbox"/>	StoreClerk	Store	Clerk	Atlanta	000004	Y
<input type="checkbox"/>	StoreClerk2				000004	Y
<input type="checkbox"/>	SupermarketClerk2				000004	Y
<input type="checkbox"/>	SupermarketClerk3				000004	Y
<input type="checkbox"/>	SupermarketClerk5				000004	Y

The **Edit User** screen displays.

Edit User

Update an Existing User. Note that all fields with an asterisk (*) are required.

Update

User Information

User ID:	Clerk1
First Name:	Jane
Last Name:	Doe
Location:	Any City
Phone:	999-999-9999
Extension:	
Email:	Any_email@email.com *
Password:	***** *
Supervisor:	Manager
Active:	Yes
Status:	Unlocked

Update **Rights** **Terminals** **Update and Reset Security Questions** **Cancel**

3. Click the **Rights**.

The **Edit User Rights** screen displays.

Edit User Rights
Update an existing user's rights

Update Rights for: Clerk1

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-Multientry
<input type="checkbox"/> Credit Card-Import Batch	<input type="checkbox"/> Recurring Import Batch	<input type="checkbox"/> Debit Card

Export Transactions
☐ Export Transactions

Level 3
☐ Level 3

Update **Clear All** **Cancel**

4. Select appropriate check boxes (rights) as required for the selected user.
5. Click **Update**.

The system updates the application, returns you to the **Edit User** screen and displays a message that rights for the user ID updated successfully.

To Remove User Rights

1. Find the user you want to edit by following the instructions under the [Finding a User Account](#) section.

- Click the **User ID** in the **User List** table.

User List						Download
• 6 items						
<input type="checkbox"/>	User ID ▾	First Name ▾	Last Name ▾	Location ▾	Supervisor ▾	Active ▾
<input checked="" type="checkbox"/>	Clerk1	Jane	Doe	Any City	Manager	Y
<input type="checkbox"/>	StoreClerk	Store	Clerk	Atlanta	000004	Y
<input type="checkbox"/>	StoreClerk2				000004	Y
<input type="checkbox"/>	SupermartClerk2				000004	Y
<input type="checkbox"/>	SupermartClerk3				000004	Y
<input type="checkbox"/>	SupermartClerk5				000004	Y

Select All Unselect All Copy User Supervisor Report

The **Edit User** screen displays.

Edit User

Update an Existing User. Note that all fields with an asterisk (*) are required.

Update

User Information

User ID:	Clerk1
First Name:	<input type="text" value="Jane"/>
Last Name:	<input type="text" value="Doe"/>
Location:	<input type="text" value="Any City"/>
Phone:	<input type="text" value="999-999-9999"/>
Extension:	<input type="text"/>
Email:	<input type="text" value="Any_email@email.com"/> *
Password:	<input type="password" value="*****"/> *
Supervisor:	<input type="text" value="Manager"/>
Active:	<input type="text" value="Yes"/>
Status:	<input type="text" value="Unlocked"/>

Update

Rights

Terminals

Update and Reset Security Questions

Cancel

3. Click **Rights**.

The **Edit User Rights** screen displays.

The screenshot shows the 'Edit User Rights' interface. At the top, it says 'Update an existing user's rights'. Below this is a header 'Update Rights for: Clerk1'. Underneath is a 'Default Selection Options' section with a dropdown menu and the text '(You may still make individual selections)'. The main section is titled 'Virtual Terminal - Transactions' and contains a grid of checkboxes for various transaction types: Credit Card-Sale, Credit Card-Return, Credit Card-Inquiry, Credit Card-Force, Credit Card-Auth Only, Credit Card-AVS Only/Verification, Credit Card-Recurring, Credit Card-Installment, Credit Card-Multientry, Credit Card-Import Batch, and Recurring Import Batch. Below this is a section for 'Export Transactions' with a checkbox and a 'Level 3' section with a checkbox. At the bottom are three buttons: 'Update', 'Clear All', and 'Cancel'.

4. Clear appropriate check boxes (rights) as required for the selected user.
5. Click **Update**.

The system updates the application, returns you to the **Edit User** screen and displays a message that rights for the user ID updated successfully.

Editing User Terminal Associations

You may perform one or more of the following to edit user terminal associations:

- Add user terminal associations
- Copy associations from other users
- Remove user terminal associations

To Add User Terminal Associations

1. Find the user you want to edit by following the instructions under the [Finding a User Account](#) section.
2. Click the **User ID** in the **User List** table.

User List						Download
• 6 items						
<input type="checkbox"/>	User ID ▾	First Name ▾	Last Name ▾	Location ▾	Supervisor ▾	Active ▾
<input type="checkbox"/>	Clerk1	Jane	Doe	Any City	Manager	Y
<input type="checkbox"/>	StoreClerk	Store	Clerk	Atlanta	000004	Y
<input type="checkbox"/>	StoreClerk2				000004	Y
<input type="checkbox"/>	SupermarketClerk2				000004	Y
<input type="checkbox"/>	SupermarketClerk3				000004	Y
<input type="checkbox"/>	SupermarketClerk5				000004	Y

The **Edit User** screen displays.

Edit User

Update an Existing User. Note that all fields with an asterisk (*) are required.

Update

User Information

User ID:	Clerk1
First Name:	<input type="text" value="Jane"/>
Last Name:	<input type="text" value="Doe"/>
Location:	<input type="text" value="Any City"/>
Phone:	<input type="text" value="999-999-9999"/>
Extension:	<input type="text"/>
Email:	<input type="text" value="Any_email@email.com"/> *
Password:	<input type="password" value="*****"/> *
Supervisor:	<input type="text" value="Manager"/>
Active:	<input type="text" value="Yes"/>
Status:	<input type="text" value="Unlocked"/>

Update

Rights

Terminals

Update and Reset Security Questions

Cancel

3. Click **Terminals**.

The **Terminal Associations** screen displays.

Terminal Associations

Enter a new terminal association

Terminal Associations for: Clerk1

User	Terminal Name	Terminal ID	Market	PIN	PIN Length	PIN Format
------	---------------	-------------	--------	-----	------------	------------

Terminal List · 9 items

Friendly Name ▾	Terminal ID ▾
ABC Company	88888899990000888888
E4 CAN INTERNET	0089250008021901387000
E4 CAN MOTO	0089250008021901395000
E4 CAN RETAIL	0089250008021901361000
E4 CAN SERVICE	0089250008021901379000
E4 US Internet	001734080219012880000
E4 US MOTO	0089250008021902526000
E4 US Retail	0017340009997772229998
E4 US SERVICE	0017340009997772229997

Display:

[Edit User](#) [Copy Associations From Other User](#)

4. Select the terminal you wish to add to the user profile from the list.

The screen updates showing the terminal association and displays a message that the terminal was successfully added.

Terminal Associations

Enter a new terminal association

000000000000000000000000 - Added successfully.

User	Terminal Name	Terminal ID	Market	PIN	PIN Length	PIN Format	
Clerk1	ABC Company	000000000000000000000000	Internet	KRDS6R1S5VLBT0FBYQXDVGOOLSAGBKARLYSPDCR1FLBTGXCUCQGQ1SWCY3	64	alphanumeric	Change PIN Delete

Terminal List - 8 items

Friendly Name	Terminal ID
E4 CAN INTERNET	00002500000021901307000
E4 CAN WOTD	00002500000021901300000
E4 CAN RETAIL	00002500000021901301000
E4 CAN SERVICE	00002500000021901379000
E4 US Internet	001734000219012000000
E4 US WOTD	00002500000021900250000
E4 US Retail	001734000990772229900
E4 US SERVICE	001734000990772229907

Display: 25

Edit User Copy Associations From Other User

Note: For each new terminal association, a new PIN is automatically generated. The new PIN can be used to process transactions from an integrated application, a Web site, or the Converge Mobile App. PINs can be 64, 32, 6, 5 or 4 characters in length. It is recommended to always use a length of 64 characters for maximum security.

- To associate an additional terminal to the user account, select another terminal from the **Terminal List**.

To Copy Associations from Other Users

1. Find the user you want to edit by following the instructions under the [Finding a User Account](#) section.
2. Click the **User ID** in the **User List** table.

User List						Download
• 6 items						
<input type="checkbox"/>	User ID ▾	First Name ▾	Last Name ▾	Location ▾	Supervisor ▾	Active ▾
<input type="checkbox"/>	Clerk1	Jane	Doe	Any City	Manager	Y
<input type="checkbox"/>	StoreClerk	Store	Clerk	Atlanta	000004	Y
<input type="checkbox"/>	StoreClerk2				000004	Y
<input type="checkbox"/>	SupermartClerk2				000004	Y
<input type="checkbox"/>	SupermartClerk3				000004	Y
<input type="checkbox"/>	SupermartClerk5				000004	Y

The **Edit User** screen displays.

Edit User

Update an Existing User. Note that all fields with an asterisk (*) are required.

Update

User Information

User ID:	Clerk1
First Name:	<input type="text" value="Jane"/>
Last Name:	<input type="text" value="Doe"/>
Location:	<input type="text" value="Any City"/>
Phone:	<input type="text" value="999-999-9999"/>
Extension:	<input type="text"/>
Email:	<input type="text" value="Any_email@email.com"/> *
Password:	<input type="password" value="*****"/> *
Supervisor:	<input type="text" value="Manager"/>
Active:	<input type="text" value="Yes"/>
Status:	<input type="text" value="Unlocked"/>

Update

Rights

Terminals

Update and Reset Security Questions

Cancel

3. Click **Terminals**.

The **Terminal Associations** screen displays.

Terminal Associations

Enter a new terminal association

Terminal Associations for: Clerk1

User	Terminal Name	Terminal ID	Market	PIN	PIN Length	PIN Format
------	---------------	-------------	--------	-----	------------	------------

Terminal List - 9 items

Friendly Name	Terminal ID
ABC Company	88888899990000088888
E4 CAN INTERNET	0089250008021901387000
E4 CAN MOTO	0089250008021901395000
E4 CAN RETAIL	0089250008021901361000
E4 CAN SERVICE	0089250008021901379000
E4 US Internet	001734080219012880000
E4 US MOTO	0089250008021902526000
E4 US Retail	0017340009997772229998
E4 US SERVICE	0017340009997772229997

Display: 25

[Edit User](#) [Copy Associations From Other User](#)

4. Click **Copy Associations From Other User** to copy the terminal associations from an existing user to the user account.

Note: If terminals are already associated to the user a message will appear that all existing terminal associations for the user will be removed and replaced with the terminal associations from the selected user.

The **Copy Terminal Associations** screen displays a list of existing users from which to select.

Copy Terminal Associations

Select one User Profile from which terminal associations will be copied

User Information

User ID:

First Name:

Last Name:

Active: Active ▼

Display: 25 ▼

User List

• 7 items

<input type="checkbox"/>	User ID ▼	First Name ▼	Last Name ▼	Location ▼	Supervisor ▼	Active ▼
<input type="checkbox"/>	Clerk1	Jane	Doe	Any City	Manager	Y
<input type="checkbox"/>	Clerk2	Jane	Smith	Any City	Manager	Y
<input type="checkbox"/>	StoreClerk	Store	Clerk	Atlanta	000004	Y
<input type="checkbox"/>	StoreClerk2				000004	Y
<input type="checkbox"/>	SupermartClerk2				000004	Y
<input type="checkbox"/>	SupermartClerk3				000004	Y
<input type="checkbox"/>	SupermartClerk5				000004	Y

- Select the existing user profile and then click **Copy Terminal Associations**.

Converge does the following:

- Copies the terminal associations from the selected existing user to the user profile.
- Displays the **Terminal Associations** screen for the user profile with all terminal associations copied from the existing user.
- Generates a new PIN for each terminal association copied to the user profile.
- Displays the terminal associations copied to the user profile.

Notes:

Converge can do the following:

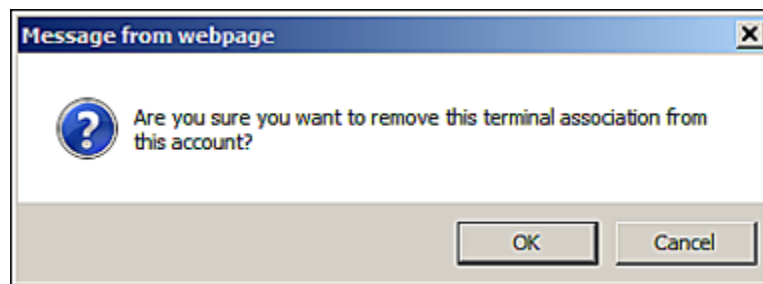
- Copy to existing user profiles that are **Active** or **Not Active**.
- Copy from existing user profiles that are **Active** or **Not Active**.
- Copy to existing user profiles with a status of **Locked** or **Unlocked**.
- Copy from existing user profiles with a status of **Locked** or **Unlocked**.
- Copy from only one existing user profile.
- Use the same security features that currently exist, which includes users only being allowed add terminals to a user that the logged in user already has access to.

To Remove User Terminal Associations

1. From the **Terminal Associations** screen, click the **Delete** button in the row in which the terminal you wish to remove appears.



2. On the dialog box that displays to confirm this action, click **OK**.



The system removes the terminal from the list and displays a message that the terminal was successfully deleted.

Note: Click **Cancel** to retain the terminal association.

Generating User Reports

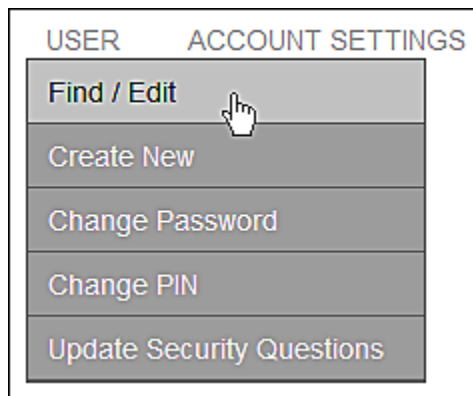
You can generate user reports in two ways:

- Include all users and the Supervisors to whom they report
- Include one or more Supervisors and the users that report to them

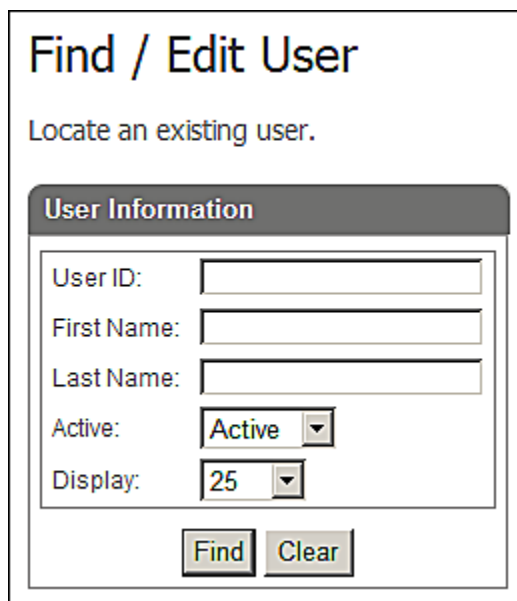
To Generate User Report for All Users and their Supervisors

This allows a user to generate a download file of all users and the Supervisor they report to.

1. Select **User | Find/Edit**.



The **Find/Edit User** screen displays.

A screenshot of the 'Find / Edit User' screen. The title 'Find / Edit User' is at the top. Below it is the instruction 'Locate an existing user.' There is a section titled 'User Information' containing several input fields: 'User ID:', 'First Name:', 'Last Name:', 'Active:' (with a dropdown menu showing 'Active'), and 'Display:' (with a dropdown menu showing '25'). At the bottom of this section are two buttons: 'Find' and 'Clear'.

2. Click **Find**.

The **User List** table displays all users.

Find / Edit User

Locate an existing user.

User Information

User ID:

First Name:

Last Name:

Active:

Display:

User List

Download

7 items

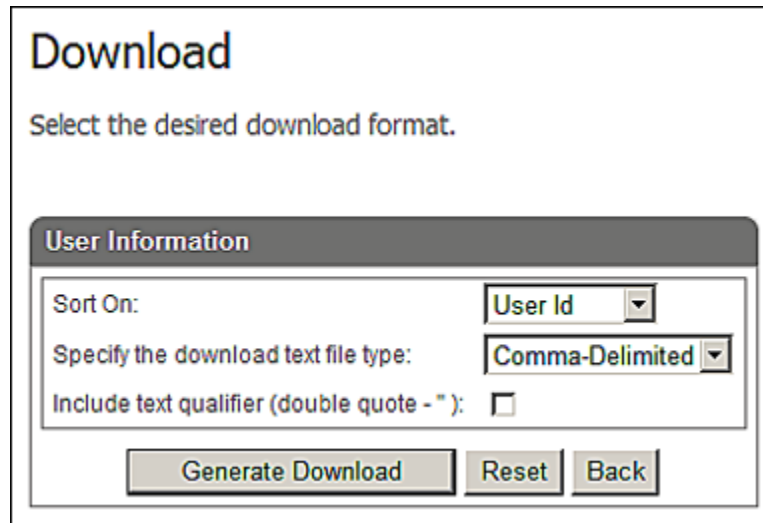
<input type="checkbox"/>	User ID	First Name	Last Name	Location	Supervisor	Active
<input checked="" type="checkbox"/>	Clerk1	Jane	Doe	Any City	Manager	Y
<input type="checkbox"/>	Clerk2	Jane	Smith	Any City	Manager	Y
<input type="checkbox"/>	StoreClerk	Store	Clerk	Atlanta	000004	Y
<input type="checkbox"/>	StoreClerk2				000004	Y
<input type="checkbox"/>	SupermartClerk2				000004	Y
<input type="checkbox"/>	SupermartClerk3				000004	Y
<input type="checkbox"/>	SupermartClerk5				000004	Y

Notes:

- If you do not define any search criteria and click **Find**, the system displays all current users (Supervisors and subordinates).
- At least one user must be selected to download the report.

3. Click **Download**.

The **Download** screen displays.



Download

Select the desired download format.

User Information

Sort On: User Id

Specify the download text file type: Comma-Delimited

Include text qualifier (double quote - "): ☐

Generate Download Reset Back

4. Sort on any one of the following:

- User Id
- First Name
- Last Name
- Location
- Supervisor
- Status

Note: The default is **User Id**.

5. Select the download text file type from the following options:

- Comma-Delimited
- Tab-Delimited
- XML

Notes:

- **Comma-Delimited**
Generates a comma-delimited file that can be opened in Microsoft Excel as a worksheet.
 - **Tab-Delimited**
Generates a tab-delimited file that can be opened in Microsoft Excel as a worksheet.
 - **XML**
Generates an XML document that opens in a new Internet browser window.
-

6. Select the Include text qualifier (double quote – “): check box, if desired.

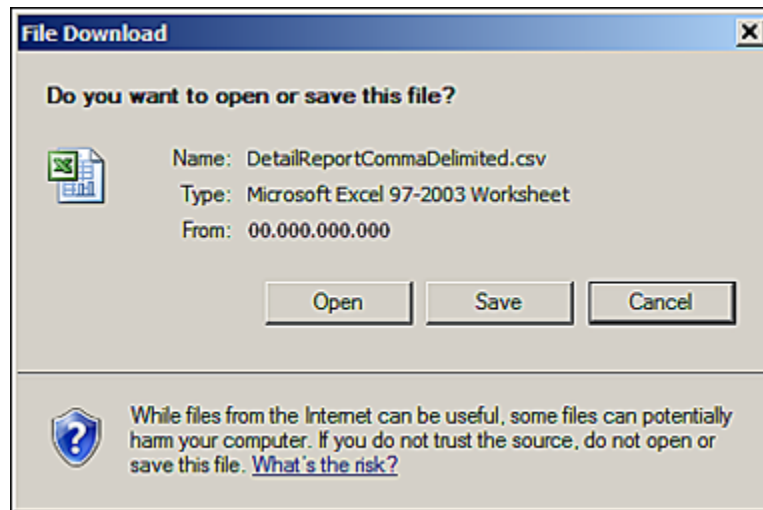
Notes:

- The default is unchecked.
 - Only available with download text file types of **Comma-Delimited** and **Tab-Delimited** options.
-

7. Click **Generate Download** to download the report.

The **File Download** message box appears with the following options:

- Open
- Save
- Cancel

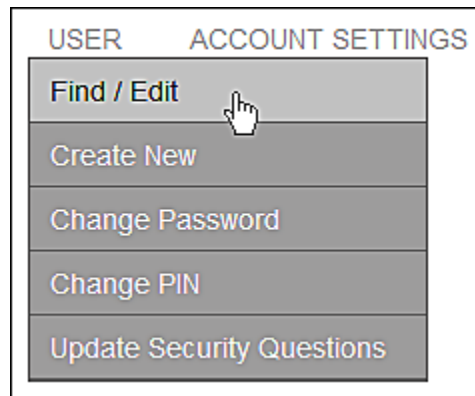


When you choose to **Open** or **Save** Converge creates the download file and displays the file in a new window.

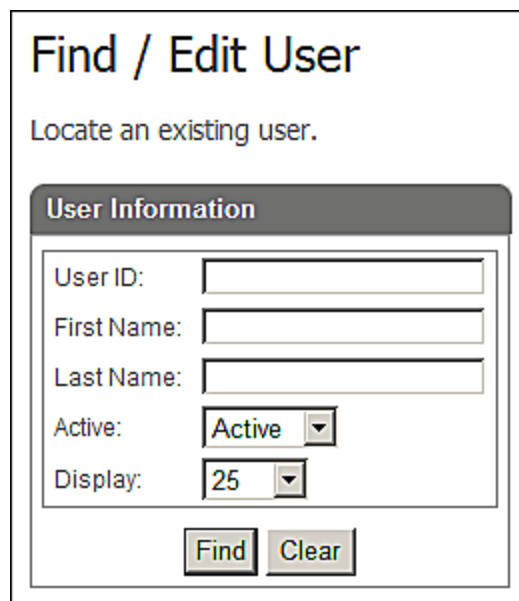
To Generate User Report for Supervisors and their Subordinates

This allows a Supervisor to generate a user report of one or more Supervisors and the users that report to them.

1. Select **User | Find/Edit**.



The **Find/Edit User** screen displays.

A screenshot of the 'Find / Edit User' screen. The title 'Find / Edit User' is at the top. Below it is the instruction 'Locate an existing user.' There is a section titled 'User Information' containing several input fields: 'User ID:', 'First Name:', 'Last Name:', 'Active:' (with a dropdown menu showing 'Active'), and 'Display:' (with a dropdown menu showing '25'). At the bottom of this section are two buttons: 'Find' and 'Clear'.

2. Click **Find**.

The **User List** table displays all users (one or more Supervisors) that directly report to that Supervisor, along with their subordinates.

Find / Edit User

Locate an existing user.

User Information

User ID:
First Name:
Last Name:
Active:
Display:

User List

Download

• 7 items

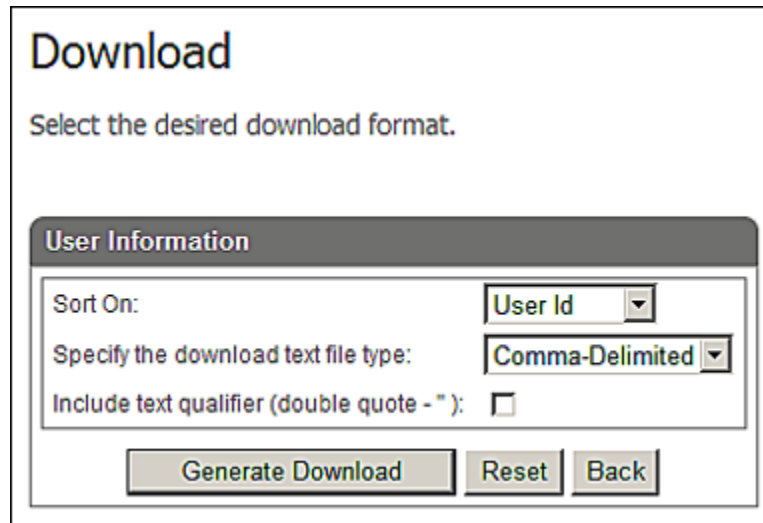
<input type="checkbox"/>	User ID	First Name	Last Name	Location	Supervisor	Active
<input checked="" type="checkbox"/>	Clerk1	Jane	Doe	Any City	Manager	Y
<input type="checkbox"/>	Clerk2	Jane	Smith	Any City	Manager	Y
<input type="checkbox"/>	StoreClerk	Store	Clerk	Atlanta	000004	Y
<input type="checkbox"/>	StoreClerk2				000004	Y
<input type="checkbox"/>	SupermartClerk2				000004	Y
<input type="checkbox"/>	SupermartClerk3				000004	Y
<input type="checkbox"/>	SupermartClerk5				000004	Y

Notes:

- If you do not define any search criteria and click **Find**, the system displays all current users (Supervisors and subordinates).
- At least one user must be selected to generate the **Supervisor Report**.

3. Click **Supervisor Report**.

The **Download** screen displays.



Download

Select the desired download format.

User Information

Sort On: User Id

Specify the download text file type: Comma-Delimited

Include text qualifier (double quote - "): ☐

Generate Download Reset Back

4. Sort on any one of the following:

- User Id
- First Name
- Last Name
- Location
- Supervisor
- Status

Note: The default is **User Id**.

5. Select download text file type:

- Comma-Delimited
- Tab-Delimited
- XML

Notes:

- **Comma-Delimited**
Generates a comma-delimited file that can be opened in Microsoft Excel as a worksheet.
 - **Tab-Delimited**
Generates a tab-delimited file that can be opened in Microsoft Excel as a worksheet.
 - **XML**
Generates an XML document that opens in a new Internet browser window.
-

6. Select **Include text qualifier (double quote – “)**: check box, if desired.

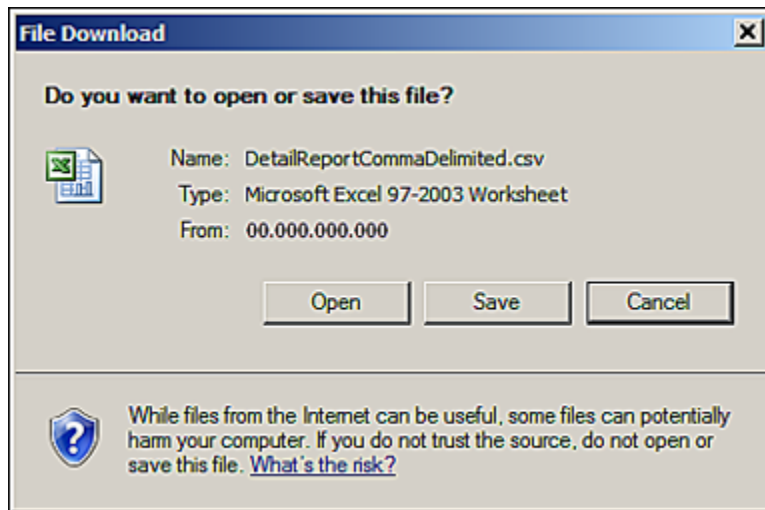
Notes:

- The default is unchecked.
 - Only available with download text file types of **Comma-Delimited** and **Tab-Delimited** options.
-

7. Click **Download File** to download the report.

The **File Download** message box appears with the following options:

- Open
- Save
- Cancel

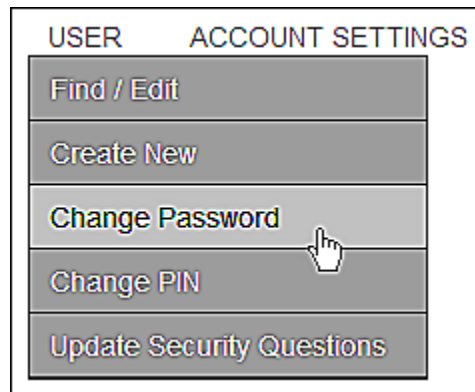


When you choose to **Open** or **Save** Converge creates the download file and displays the file in a new window.

Changing Your Password

As a security measure, each user's password is set to expire 45 days after the last password change. Users who do not change their password within the last 45 days must enter new passwords on the next successful login. To change your password, you must have already logged in with your old password. If you cannot remember your current password, or if your account has been locked, call Customer Service for assistance.

1. Select **User | Change Password**.



The **Change Password** screen displays.

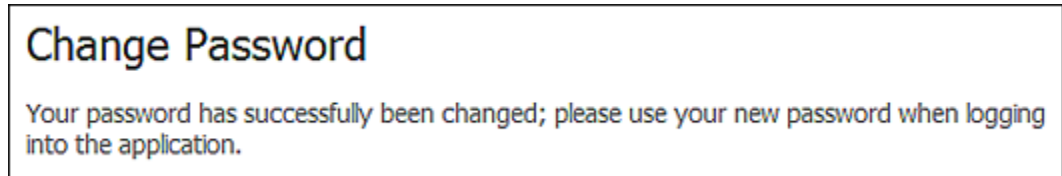
 A screenshot of the 'Change Password' screen. At the top, the title 'Change Password' is displayed. Below the title, a paragraph of instructions states: 'To change your password, you must enter your current password and provide a new one that is based on the criteria below. Make sure you confirm your new password then select "Change password". Note that all fields with an asterisk (*) are required.' Below this text is a form titled 'Change Password' containing three input fields: 'Current password:', 'New Password:', and 'Confirm New Password:'. Each field has a red asterisk (*) to its right. At the bottom of the form are two buttons: 'Change Password' and 'Clear'. Below the form, the section 'Password Instructions' is shown, followed by a paragraph: 'Each user's case-sensitive password must meet the following criteria'. This is followed by a bulleted list of four criteria:

- The password must be a minimum of eight (8) characters in length.
- The password must contain at least one lower-case letter, one upper-case letter, one number and one of the following special characters: ` - = [] ; ' , . / ~ ! @ # \$ % ^ & * () _ + { } : " < > ? | .
- The password must be changed at a minimum of every ninety (90) days.
- The previous thirteen (13) passwords cannot be reused.

2. Enter your old password in the **Current Password** field.
3. Enter your new password in the **New Password** field.

4. Enter your new password again in the **Confirm New Password** field for verification.
5. Click **Change Password** to complete the password change.

The system displays a message that your password successfully updated.

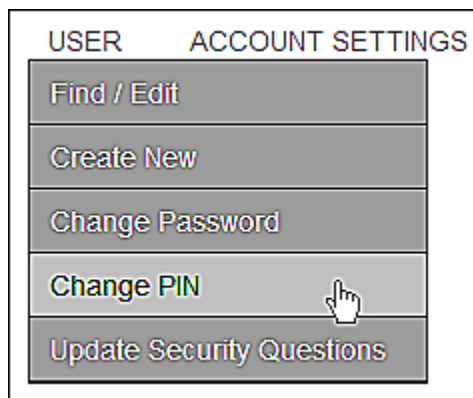


Note: Click **Clear** if you want to abandon any changes.

Changing Your PIN

Converge allows you to change the length and format of the terminal PINs associated with your account. The system automatically generates PINs, so you are unable change the actual PIN text. You are only allowed to change length and format of your the PIN.

1. Select **User | Change PIN**.



The **Change PIN** screen displays.



- If you want to change the **PIN Length**, select one of the following options from the drop-down list:

- Sixty Four characters (recommended)
- Thirty two characters
- Six characters
- Five characters
- Four characters

Notes:

- PIN length defaults to 64 characters
 - PINs are case sensitive
-

- Click **Change PIN** to save the PIN length changes and generate the new PIN.
- If you want to change the **PIN Format**, select one of the two options from the drop-down list and click **Change PIN** to save the PIN format changes and generate the new PIN:

- Alphanumeric (recommended)
- Numeric

Note: PIN format defaults to alphanumeric.

- To just change your PIN, click **Change PIN**, and the system will auto generate the new PIN.

You can change both the PIN length and PIN format at the same time. For example:

The screen below shows an example of a PIN (**QBQYCL...**) with a length of 64 characters and the format is alphanumeric.

The screenshot shows a web interface titled "Change PIN" with the instruction "Enter a new PIN." Below this is a table with columns: User, Terminal Name, PIN, Market, PIN Length, PIN Format, and a "Change PIN" button. The table lists several users, and the PIN for "Clerk1 E4 CAN RETAIL" is highlighted with a red circle.

User	Terminal Name	PIN	Market	PIN Length	PIN Format	Change PIN
Clerk1	ABC Company	EYLZ2U3E3UUA2RJPUKCE7B9VYFFFAALRH8MUQTUGN3VW5JAJMTNAU3EHCXEP	Internet	64	alphanumeric	Change PIN
Clerk1	E4 CAN INTERNET	ODIRADEG1D6RH381FSZ1B2LSPXSU61JEK8YH9C7XB83WYBAWEJO0ZVDAHLHFYVM	Internet	64	alphanumeric	Change PIN
Clerk1	E4 CAN MOTO	C7GEI2M9CE4XORH4BY3CKV8DN7XSAOM1WCCEDLMOISD3EY11954OEDBK5906OA29	MOTO	64	alphanumeric	Change PIN
Clerk1	E4 CAN RETAIL	QBQYCL9C3A57XxFLBOI6IFSv0TFW77LUNK129GLM6POWYWB4NFDNHQ25UKT3Z0	General Retail	64	alphanumeric	Change PIN
Clerk1	E4 CAN SERVICE	RHC3C48HVPN99FOH3XY2ZZM1M1L2WPXAQ7Q215WYSOSZ187N9OAP8D,XX68TXR6	Service	64	alphanumeric	Change PIN

- To change the PIN length from 64 to 4, select **four characters** from the **PIN Length** drop-down list .

- b) To change the PIN format from alphanumeric to **numeric**, select numeric from the **PIN Format** drop-down list .
- c) Click **Change PIN**. The system saves the PIN length and format changes and generates a new numeric 4-character PIN.

Change PIN
Enter a new PIN.

User	Terminal Name	PIN	Market	PIN Length	PIN Format	
Clerk1	ABC Company	EYLZ2U3E3UUA2RJPUK3E7BVVFFFAALNH8UAQ7UGN3VW5JAJMTHAU3EHCXEP	Internet	64	alphanumeric	Change PIN
Clerk1	E4 CAN INTERNET	ODIRADEG1D0RH381FSZ1B2L5PXU51JEK8YH9CTXBB3VWBAWEJO0ZVDANLHFYVM	Internet	64	alphanumeric	Change PIN
Clerk1	E4 CAN MOTO	C7GEI2M0CE4XQRH@Y3CKVBDN7XSAOM1WCCEDLMOIS03EY11954OEDBK59060A29	MOTO	64	alphanumeric	Change PIN
Clerk1	E4 CAN RETAIL	5035	General Retail	64	alphanumeric	Change PIN
Clerk1	E4 CAN SERVICE	RHC3C4SHYPN99FOH3XY2Z2M1M1L2WPXAQ7Q2115WYS0S2187N9OAPBOJX58TXR5	Service	64	alphanumeric	Change PIN

Updating Your Security Questions

When you first accessed Converge and used the password assigned to you by Elavon's customer service, you were prompted to enter three security questions and answers. Follow the procedure below to change either the questions or answers.

1. Select **User | Update Security Questions**.

USER	ACCOUNT SETTINGS
Find / Edit	
Create New	
Change Password	
Change PIN	
Update Security Questions	

The **Update Security Questions** screen displays.

Update Security Questions

Please reenter your password, select your security questions and provide an answer for each one.

Security Questions

Confirm Password

Password: *

Security Questions & Answers

Question1	What is your mother's first name?	Answer
Question2	What was your first pet's name?	Answer
Question3	In what city were you born?	Answer

2. Enter your **Password**.
3. Select the security question you would like to change from the **Question** drop-down list.

The new security question displays.

Update Security Questions

Please reenter your password, select your security questions and provide an answer for each one.

Security Questions

Confirm Password

Password: *

Security Questions & Answers

Question1	What is your maternal grandmother's first name?	Answer	
Question2	What was your first pet's name?	Answer
Question3	In what city were you born?	Answer

4. Enter your **Answer**.
5. Click **Update**.

The system displays a message that your security question and answer successfully updated.

Update Security Questions

Please reenter your password, select your security questions and provide an answer for each one.

Successfully updated Security question and answers.

Security Questions

Confirm Password

Password: *

Security Questions & Answers

Question1	<input type="text" value="What is your maternal grandmother's first name?"/>	Answer	<input type="password" value="....."/>
Question2	<input type="text" value="What was your first pet's name?"/>	Answer	<input type="password" value="....."/>
Question3	<input type="text" value="In what city were you born?"/>	Answer	<input type="password" value="....."/>

Chapter 3: Managing Account Settings

The **Account Settings** menu has a single option called **IP Address Options**. This feature restricts access to a Converge account so that only certain IP addresses can access an account with its designated terminals. Therefore, if you attempt to access an account from an IP address that is not in the list, you will be denied access.

Notes:

- The **IP Limitation** feature applies to the user interface (`Login.do`) only, it does not apply to the API (`Process.do` and `Processxml.do`) and will not limit any gateway transactions.
 - To limit IP transactions you must setup the **Merchant IP Address Filter** in the fraud prevention screen. For more information, refer to the [Setting Up Fraud Prevention Rules](#) section.
-

In this chapter you will use the **Login IP Address** feature to do any of the following operations:

- Add a login IP Address
- Delete a login IP Address

Adding a Login IP Address

1. Select **Account Settings | IP Address Options**.



The **IP Address Options** screen displays all authorized login IP addresses that are already associated with this account.

IP Address Options

This form is used configure IP address options

Login IP Address Options

Use Login IP Addresses ☐

Authorized Login IP Addresses (max 50)

00.000.000.000	Delete
00.000.000.001	Delete
00.000.000.002	Delete
000.000.000.00	Delete
00.000.000	Delete

Add Login IP Address

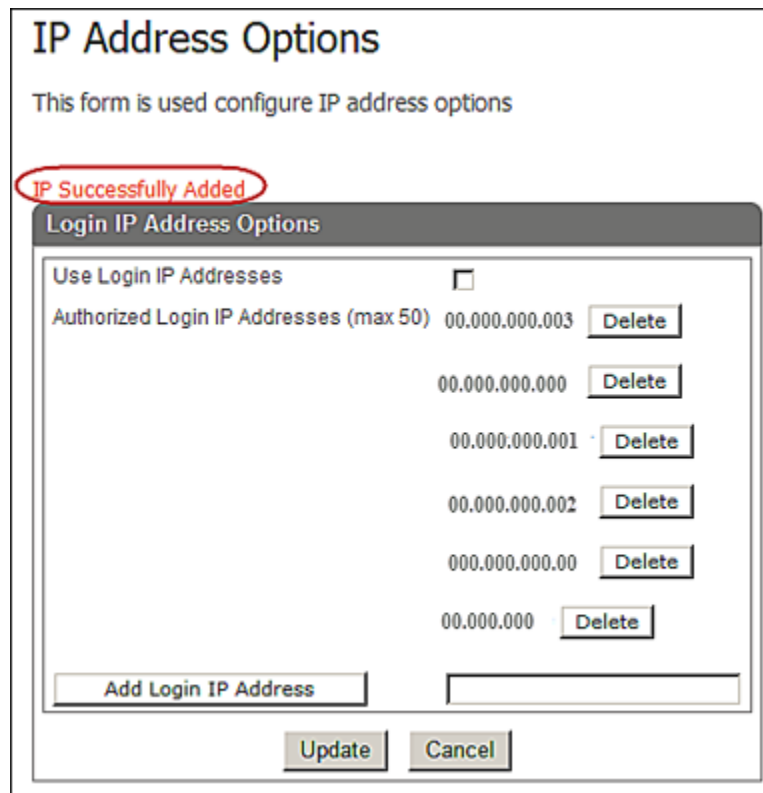
Update Cancel

2. Select the **Use Login IP Addresses** check box.

Note: You must select **Use Login IP Addresses** to use an IP address to restrict access to an account. This option is not activated if you only add IP addresses.

3. In the text box provided, enter the login IP address you want to allow to access this account.
4. Click **Add Login IP Address**.

The system displays a message that the IP address successfully added.



The screenshot shows a web form titled "IP Address Options" with the subtitle "This form is used configure IP address options". A red circle highlights a message "IP Successfully Added" at the top. Below this is a section titled "Login IP Address Options" containing a checkbox "Use Login IP Addresses" which is unchecked. Underneath is a table of "Authorized Login IP Addresses (max 50)". The table has two columns: the IP address and a "Delete" button. The listed IP addresses are 00.000.000.003, 00.000.000.000, 00.000.000.001, 00.000.000.002, 000.000.000.00, and 00.000.000. At the bottom of the table is an "Add Login IP Address" button and an empty text input field. At the very bottom of the form are "Update" and "Cancel" buttons.

Authorized Login IP Addresses (max 50)	Delete
00.000.000.003	Delete
00.000.000.000	Delete
00.000.000.001	Delete
00.000.000.002	Delete
000.000.000.00	Delete
00.000.000	Delete

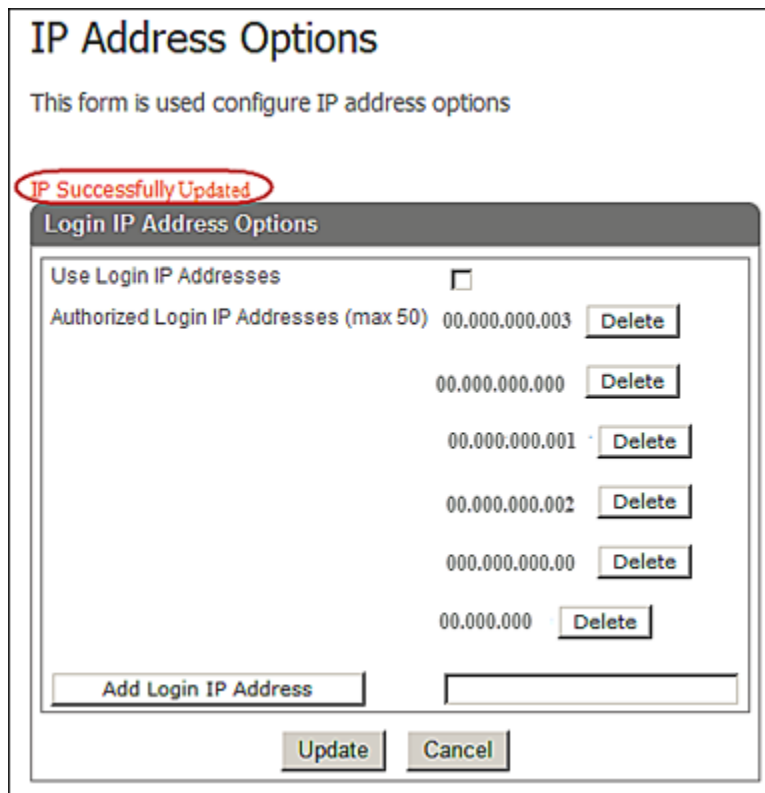
5. To add other IP addresses, repeat steps 3 and 4.

Notes:

- You can add a maximum of 50 IP addresses or IP range addresses for your account.
 - You must provide a valid IP address to your account with all 4 octets of the IP address (for example, 123.45.67.89) or a range of IP addresses, with only the first 2 or 3 octets (for example, 123.45 or 123.45.67).
 - IP addresses must be public.
-

6. Click **Update**.

The system displays a message that the IP addresses were successfully updated.



The screenshot shows a web form titled "IP Address Options" with the subtitle "This form is used configure IP address options". A red oval highlights a message at the top: "IP Successfully Updated". Below this is a section titled "Login IP Address Options" containing a checkbox "Use Login IP Addresses" which is unchecked. Underneath is a table of "Authorized Login IP Addresses (max 50)". The table has two columns: the IP address and a "Delete" button. The listed IP addresses are 00.000.000.003, 00.000.000.000, 00.000.000.001, 00.000.000.002, 000.000.000.00, and 00.000.000. At the bottom of the table is an "Add Login IP Address" button and an input field. At the very bottom of the form are "Update" and "Cancel" buttons.

Authorized Login IP Addresses (max 50)	Delete
00.000.000.003	Delete
00.000.000.000	Delete
00.000.000.001	Delete
00.000.000.002	Delete
000.000.000.00	Delete
00.000.000	Delete

Note: Click **Cancel** to abandon updates or return to the Converge **Main** page.

Deleting a Login IP Address

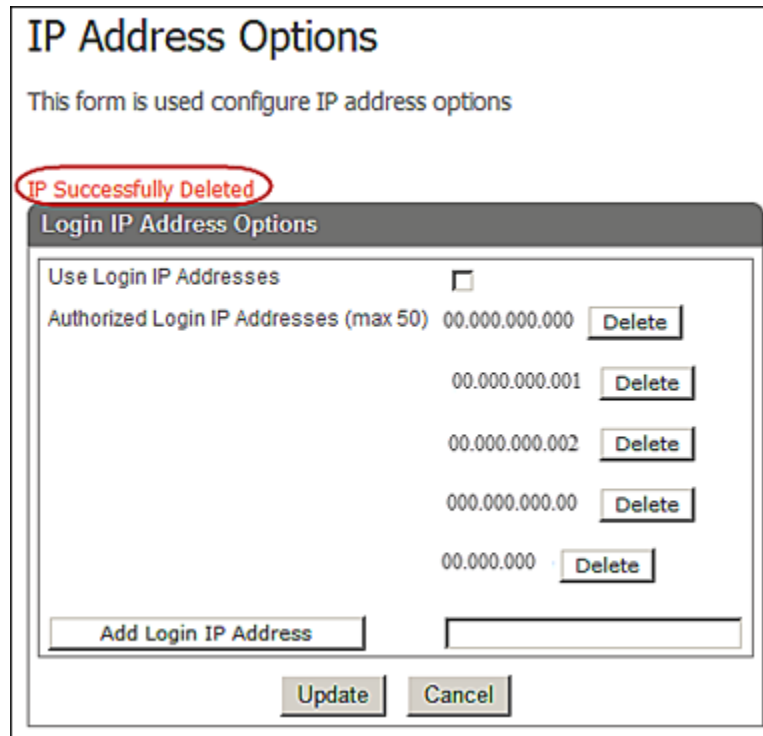
1. Select **Account Settings** | **IP Address Options**.



The **IP Address Options** screen displays all authorized login IP addresses that are already associated with this account.

2. Click **Delete** next to the IP address you want to delete.

The system displays a message that the IP address was successfully deleted.



The screenshot shows a web form titled "IP Address Options" with the subtitle "This form is used configure IP address options". A red oval highlights a message "IP Successfully Deleted" at the top of the form. Below this is a section titled "Login IP Address Options" which contains a checkbox for "Use Login IP Addresses" (currently unchecked). Underneath is a table of "Authorized Login IP Addresses (max 50)". The table has two columns: the IP address and a "Delete" button. The listed IP addresses are 00.000.000.000, 00.000.000.001, 00.000.000.002, 000.000.000.00, and 00.000.000. At the bottom of the table is an "Add Login IP Address" button and an empty text input field. At the very bottom of the form are "Update" and "Cancel" buttons.

Authorized Login IP Addresses (max 50)	Delete
00.000.000.000	Delete
00.000.000.001	Delete
00.000.000.002	Delete
000.000.000.00	Delete
00.000.000	Delete

3. To delete other IP addresses, repeat step 2.
4. Click **Update**.

The system displays a message that the IP addresses successfully updated.

The screenshot shows a web-based configuration window titled "IP Address Options". Below the title is a subtitle: "This form is used configure IP address options". A red oval highlights a message that says "IP Successfully Updated". Below this message is a sub-section titled "Login IP Address Options". Inside this sub-section, there is a checkbox labeled "Use Login IP Addresses" which is currently unchecked. Below the checkbox is a table of "Authorized Login IP Addresses (max 50)". The table contains six rows, each with an IP address and a "Delete" button. The IP addresses are: 00.000.000.003, 00.000.000.000, 00.000.000.001, 00.000.000.002, 000.000.000.00, and 00.000.000. Below the table is an "Add Login IP Address" button and an empty text input field. At the bottom of the window are "Update" and "Cancel" buttons.

Login IP Address Options	
Use Login IP Addresses <input type="checkbox"/>	
Authorized Login IP Addresses (max 50)	
00.000.000.003	Delete
00.000.000.000	Delete
00.000.000.001	Delete
00.000.000.002	Delete
000.000.000.00	Delete
00.000.000	Delete
Add Login IP Address <input type="text"/>	
Update Cancel	

Chapter 4: Managing Terminals

When you use Converge, you might have a single terminal or multiple terminals configured. You can control which users have access to these terminals when you configure that user's account.

If you only have one terminal associated with your user ID, you will automatically have that terminal selected when you access Converge. However, if you have multiple terminals you will need to select a terminal to work in. You can select only one terminal to work in at any given time.


This chapter describes how to:

- Select terminals
- Set up merchants
- Set up payment form
- Manage advanced settings

Selecting a Terminal

Converge allows you to find and select terminals by the terminal friendly name.

1. On the Converge logon page, click **Select Terminal**.

	MerchantConnect Support Section Help Logout
User: Jane Doe Account: 000004	USER ACCOUNT SETTINGS
Select Terminal	<h3>Main</h3> <p>Welcome to Converge. The Converge Virtual Terminal system is a secure internet-based transaction processing system that enables your business to process transactions in real-time.</p>
Privacy Policy Terms of Use Copyright © 2014 Elavon, Inc. All rights reserved.	

The **Select Terminal** screen displays a list of the terminals on which you have access in alphabetical order by **Friendly Name**.

Notes:

For users that have access to more than 25 terminals Converge does the following:

- Default the number of terminals to be displayed per page to 25.
- Allow users to select the default number of terminals to be displayed per page: 25, 50, 75, 100, 250, 500, 750, and 1000.
- Allow users to page through the terminals on which they have access as follows:
 - Select a specific page
 - Select next page
 - Select previous page
 - Advance to the first page
 - Advance to the last page

2. If you have access to 25 or less terminals, from the **Terminal List** table, click the terminal you wish to access from the list.

Select Terminal

Select the desired terminal.

Friendly Name	Market	Region	Terminal ID
ABC Company	Internet	United States	8888889999900000888888
E4 CAN INTERNET	Internet	Canada	0089250008021901387000
E4 CAN MOTO	MOTO	Canada	0089250008021901395000
E4 CAN RETAIL	General Retail	United States	0089250008021901361000
E4 CAN SERVICE	Service	United States	0089250008021901379000

Display: 25

3. If you have access to more than 25 terminals, from the **Find Terminal** text box, enter any number of characters (including letters, numbers, and special characters) in the terminal friendly name for the terminal you wish to access.

Converge displays a list of terminals that you have access to with those characters located anywhere in the **Friendly Name**.

Select Terminal

Select the desired terminal.

Find Terminal

MOTO

canada moto check
E4 CAN MOTO
E4 US MOTO
PX CAN MOTO E3
PX US MOTO E4
PX USA MOTO H

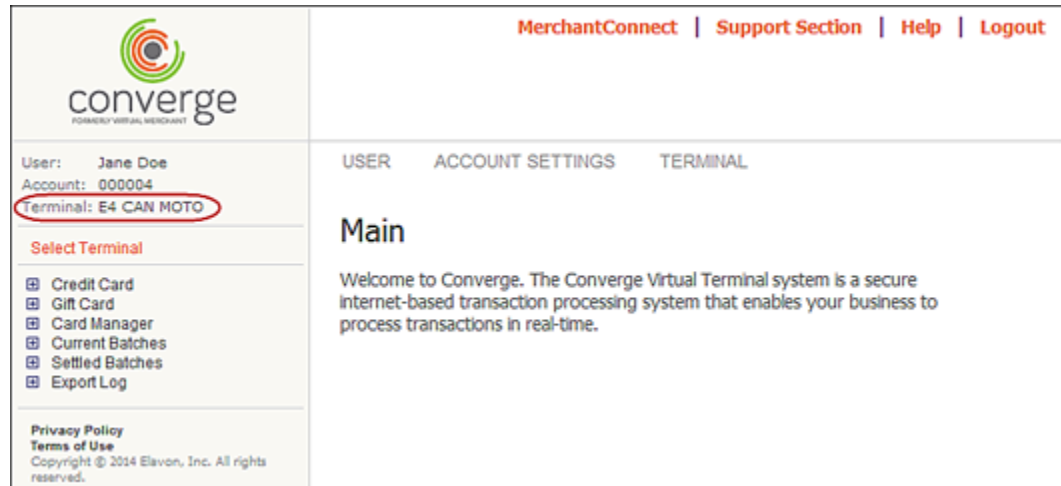
	Market	Region	Terminal ID
	Internet	United States	88888899999000088888
ABC Company Name	General Retail	United States	2313245322454564134
ABC Terminal	Internet	United States	8888888888888888889
ACH Test Terminal No Change	Service	United States	0017340008021930584000
canada internet	Internet	Canada	23424354546
canada moto check	MOTO	Canada	1242

PX CAN Internet	Internet	Canada	00173400099977722299
PX CAN MOTO E3	MOTO	Canada	0017340009997772228333
PX CAN Retail E4	General Retail	Canada	0010548510000000724981
PX CAN Service E4	Service	Canada	0017340009997772228334

Display: 25

- Click the **Friendly Name** to select the terminal you wish to access from the list.

The **Main** Converge screen displays and you will now see the **Terminal** menu option at the top of the screen, along with the type of transactions available to you on this terminal.

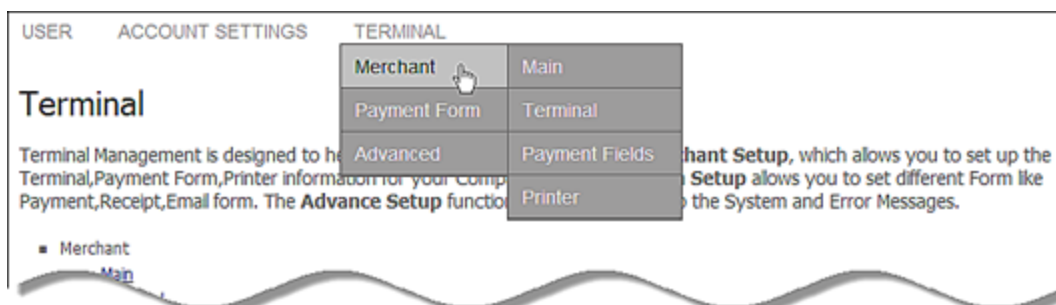


Once you have the terminal selected, you can proceed with other actions available to you from the **Terminal** menu option as described in the following sections.

Setting Up Merchant Information

The Merchant Setup menu consists of the following options:

- **Main**
Allows you to update merchant information
- **Terminal**
Allows you to update terminal information
- **Payment Fields**
Allows you to update payment fields and payment sections
- **Printer**
Allows you to configure your printer



To Update Merchant Information (Main Option)

This function allows you to view and edit merchant information.

Your merchant information includes:

- Merchant Name
- Address, City, State, Province and Postal Code
- Contact Information
- Terminal E-mail
- SMS E-mail
- Web site

To update this information:

1. Select **Terminal | Merchant | Main**.

The **Update** screen displays.

The screenshot shows a web interface titled "Update". Below the title is a note: "This form is used to update the selected terminal. Note that all fields with an asterisk (*) are required." Below this is a form titled "Update Merchant Information". The form contains several input fields with labels on the left and values in the input boxes. The fields are: Merchant Name (ABC Company), Address 1 (123 Main St), Address 2 (empty), City (Any City), State/Province (Any State), Postal Code (99999), Contact Name (John Doe), Contact Phone 1 (999-999-9999), Contact Phone 2 (empty), Contact E-mail (any.email@email.com), Terminal E-mail (any.email@email.com), SMS E-mail (empty), and Merchant's URL(Website) (empty). The "Contact E-mail" and "Terminal E-mail" fields have a red asterisk (*) to their right, indicating they are required. At the bottom of the form are two buttons: "Update" and "Cancel".

Update Merchant Information	
Merchant Options	
Merchant Name:	ABC Company
Address 1:	123 Main St
Address 2:	
City:	Any City
State/Province:	Any State
Postal Code:	99999
Contact Name:	John Doe
Contact Phone 1:	999-999-9999
Contact Phone 2:	
Contact E-mail:	any.email@email.com *
Terminal E-mail:	any.email@email.com *
SMS E-mail:	
Merchant's URL(Website):	
<input type="button" value="Update"/> <input type="button" value="Cancel"/>	

2. Update the fields as desired.

Note: The **Contact E-mail** and **Terminal E-mail** addresses cannot be left blank. All other fields are optional.

3. Click **Update** when all fields are completed the way you want them.

The **Update** screen indicates that your update succeeded.

Update

This form is used to update the selected terminal. Note that all fields with an asterisk (*) are required.

Update succeeded.

Update Merchant Information

Merchant Options

Merchant Name:	ABC Company
Address 1:	123 Main St
Address 2:	
City:	Any City
State/Province:	Any State
Postal Code:	99999
Contact Name:	John Doe
Contact Phone 1:	999-999-9999
Contact Phone 2:	
Contact E-mail:	any.email@email.com *
Terminal E-mail:	any.email@email.com *
SMS E-mail:	
Merchant's URL(Website):	

To Update Terminal Information

Your terminal information includes the following settings:

Settings	Description
Merchant ID	The merchant identification number (MID) assigned by Elavon. A single MID may have multiple terminal numbers or locations that accept funds generated by transactions.
Terminal Number	The number assigned by Elavon to a single merchant location, also called a TID. One or several terminal numbers might be under a single MID.
Friendly Name	An easy-to-recognize name for the terminal, assigned by the merchant (for example: My Retail Store).
Region	The geographic region where the terminal is located (for example: United States).
Time Zone	The time zone where the terminal or store is located (for example: Eastern Time).
Currency	The merchant base currency used in transactions (for example: United States dollar).
Processing Type	The terminal capture and processing type. Possible values are Terminal-based or Host-Based.
Financial Institution Number	The identification number used for only those terminals set up with Account Updater.
Market Segment	Business type or category (for example: Retail, Service, Internet, or Mail Order).

Settings	Description
Status	<p>The terminal processing status.</p> <p>There are three possible statuses:</p> <ul style="list-style-type: none"> • Active Allows you to process and settle transactions. • Not Live Allows you to process test transactions via API only. No settlement or UI processing is allowed. • Suspended Allows you to log on to the terminal and view activity. No processing is allowed. <p>Notes:</p> <p>When the status of a terminal is:</p> <ul style="list-style-type: none"> • Not Live <ul style="list-style-type: none"> • Recurring, auto settlement and manual settlement are not possible. • Transactions are processed in test mode using the API and transactions via the UI are not allowed. • Suspended <ul style="list-style-type: none"> • Recurring, auto settlement and manual settlement are not possible. • The terminal cannot process transactions via API or UI. • Active <ul style="list-style-type: none"> • Merchants can process transactions as usual. • Transactions and settlement are allowed. <p>The terminal can only process real transactions when set to Active.</p>
Payment Type	<p>The type of payments that a terminal is capable of processing (for example: Credit, Debit, Food Stamp, Gift, Loyalty, Electronic Check, Cash Benefit, or Cash Tender).</p>
Credit Payment Options	<p>Additional options and capabilities that can be performed by a terminal. Your options are: Address Verification, CVV2, CVC2, CID, Purchasing Card 2, Invoice Number, Dynamic Currency or Multi-Currency, Recurring, Verify Last 4-digits, Travel Data, or Account Updater.</p>
Recurring Payment Options	<p>The default billing cycle for a terminal (for example: Monthly, Weekly, or Annually).</p>
Debit Payment Options	<p>Debit related options (for example: Cashback or Surcharge).</p>
Electronic Check Payment Options	<p>Electronic Check related options. Your options are:</p> <ul style="list-style-type: none"> • Check Type • Service Type • MPS Merchant ID • Image Upload Options • Consumer Data (DLL and Phone)

Settings	Description
Other Payment Options	For example: MBNA Private Label.
Transaction Entry Options	The payment entry capabilities allowed for a terminal. This function shows if the terminal is able to process transactions though the API (for example: Enable HTTPS Transaction).
Tokenization	This option will enable the card manager in the user interface and the tokenization in the API. This functionality allows a merchant to store credit card and billing information to process transactions manually at a later time (card on file).

From this list, you can update the **Friendly Name** option only.

1. Select **Terminal** | **Merchant** | **Terminal**.

The **Update Terminal** screen displays.

Update Terminal

This form is used to update the selected Terminal. Note that all fields with an asterisk (*) are required.

Terminal Information: Account ID 000004

Terminal	
Merchant ID:	454345486465
Terminal Number:	88888899990000088888
Friendly Name:	ABC Company *
DBA Name:	Disabled
Region:	United States
Time Zone:	Eastern Time
Currency:	United States Dollar
Processing Type:	Terminal-P

Level 3: ed

Other Payment Options:

Transaction Entry Options: Enable HTTPS Transaction
Enable HTTPS Batch Import

Tokenization:

Update **Cancel**

2. Enter the name you want your terminal to be known as in the **Friendly Name** field.

3. Click **Update**.

The **Update Terminal** screen changes to indicate that you have updated the terminal **Friendly Name** successfully.

Update Terminal

This form is used to update the selected Terminal. Note that all fields with an asterisk (*) are required.

Update succeeded.

Terminal Information: Account ID 000004

Terminal	
Merchant ID:	454345486465
Terminal Number:	8888889999900000888888
Friendly Name:	<input type="text" value="New Company"/> *
DBA Name:	Disabled
Region:	United States
Time Zone:	Eastern Time
Currency:	United States Dollar
Processing Type:	Terminal-Based
Institution:	056

Level 3.

Other Payment Options:

Transaction Entry Options: Enable HTTPS Transaction
Enable HTTPS Batch Import

Tokenization:

Notes:

- The terminal must be active to process live transactions.
- If you need to change any settings in your terminal, call your system administrator or Elavon at 1-800-377-3962, option 2, option 2 (in Canada you are asked to choose either English or French for your language).

To Update Payment Fields and Payment Sections

Converge allows you to configure how payment fields display both in Virtual Terminal and on the payment form to the customer. Sections are placeholders for information that can be configured to display on the payment forms. Each section is composed of the individual fields on the payment forms.

Options available to modify payment fields and sections include:

- Add new payment fields
- Delete payment fields
- Edit payment fields
- Rearrange payment fields
- Add new payment sections
- Edit payment sections
- Delete payment sections

To Add New Payment Fields

This function allows you to define how payment fields appear on the screen, as well as on the Converge payment form.

1. Select **Terminal | Merchant | Payment Fields**.

The **Payment Fields** screen displays.

Payment Fields

This form is used to update the field use and order.

Payment Field Setup

Order Section	Required	OrderSection	System Field
Account Data/MICR Data	Yes	ssl_account_data	System Field
Bank Account Number	Yes	ssl_bank_account_number	System Field
Bank Routing Number	Yes	ssl_aba_number	System Field
Expiration Date	Yes	ssl_expire_date	System Field
Promo Code	No	ssl_promo_code	System Field
Enrollment	No	ssl_enrollment	System Field
<input type="button" value="Add New Field"/>			
Billing Address	Required	BillingAddress	System Field
Company	No	ssl_company	System Field
First Name	No	ssl_first_name	System Field
Last Name	No	ssl_last_name	System Field
<input type="button" value="Add New Field"/>			
Customer Data 1	Required	Cust1	System Field
Customer Data 1	No	cust_1	System Field
<input type="button" value="Add New Field"/>			
<input type="button" value="Add New Section"/>			

- Click **Add New Field**.

The **Add New Payment Field** screen displays.

Add New Payment Field

This form is used to add a new payment field. Note that all fields with an asterisk (*) are required.

New Payment Field configuration

Field Options

Name: *

Display Name: *

Section: *

Field Type: *

Minimum Number of Characters:

Maximum Number of Characters: *

Required: ☐

Show in Virtual Terminal: ☐

Can be changed on Payment Form: ☐

Show on Payment Form: ☐

Show in Receipt: ☐

Show in Email to Customer: ☐

Show in Email to Merchant: ☐

Forward on Approval: ☐

Forward on Decline: ☐

Add New Field **Cancel**

3. Enter the **Name** of the new field, without spaces.

Note: This field cannot be edited once the field is added.

4. Enter the name for the field that will show on the payment form in the **Display Name** field.

5. In the **Section** drop-down list, select the section in which you want the new field to display on the payment form from the following:

- Billing Address
- Order Section
- Custom Fields
- Shipping Address

6. In the **Field Type** drop-down list, select one of the following:

- Text
- Drop Down
- Checkbox

7. Enter the **Maximum Number of Characters** for this field.

For text fields that are custom fields or system fields that are optional, you can define the minimum length required for a value entered in the field.

8. Select required check boxes to specify where the new fields will display.

Fields	Description
Required	Designates the field as required on the payment form and in the Virtual Terminal. Fields the system sets as required cannot be changed.
Show in Virtual Terminal	Specifies whether the field is visible in the Virtual Terminal.
Can be Changed on Payment Form	Specifies whether the field can be edited on the payment form. This option is not valid unless you select the Show on Payment Form check box. Note: Applicable to the API response only.
Show on Payment Form	Specifies whether the field is visible in the Converge payment form.
Show in Receipt	Places this field on the transaction receipt.
Show in Email to Customer	Includes this field in the customer email to the addresses entered into the payment form. You must enter the Contact Email on the Update Merchant Information screen for the email to be sent to the customer.
Show in Email to Merchant	Includes this field in the merchant notification email to the addresses entered into the Terminal E-mail on the Update Merchant Information screen.

Fields	Description
Forward on Approval	Forwards the information in this field to the URL specified for the merchant if the transaction is approved. Note: Applicable to the API response only.
Forward on Decline	Forwards the information in this field to the URL specified for the merchant if the transaction is declined. Note: Applicable to the API response only.

Notes:

If you select or clear any of the following settings on this screen, when you click **Add New Field**, the system automatically updates setting in the section in which the field is located:

- Show in Virtual Terminal
- Show on Payment Form
- Show in Receipt
- Show email to Customer
- Show email to Merchant

9. Click **Add New Field**.

The **Payment Fields** screen displays and indicates that your update was successful. The new field displays at the bottom of the section.

Payment Fields

This form is used to update the field use and order.

Custom Field 2 - Payment field Added successfully.

Order Section	Required	OrderSection	System Field
Account Data/MICR Data	Yes	ssl_account_data	System Field
Bank Account	Yes	bank_account	System Field

Add New .

Custom Fields	Required	CustomFields	System Field
Customer Data 1	No	cust_1	
Custom Field 2	No	custom_field2	

Add New Field

Add New Section

10. To change the order in which the fields display in the section, click the up or down arrows (refer to the [To Rearrange Payment Fields](#) section).

To Delete Payment Fields

Only user-defined fields can be deleted. You are not allowed to delete system-defined fields.

1. On the **Payment Fields** screen, click on the field you want to delete.

Payment Fields

This form is used to update the field use and order.

Payment Field Setup

				System Field
▲ ▼	Account Data/MICR Data	Yes	ssl_account_data	System Field
▲ ▼	Expiration Date (MMYY)	Yes	exp_date	System Field
▲ ▼	Amount	Yes	amt	System Field

Add New

				System Field
▲ ▼	Custom Field 1	No	cust_1	
▲ ▼	CustomData1	No	CustomData1	
▲ ▼	New Customer Field	No	Custom_Field	

Add New Field

Add New Section

The **Update Payment Field** screen displays the selected field.

2. Click **Delete**.

The system displays a message to confirm if the field should be deleted.

Update Payment Field

This form is used to update a payment field. Note that all fields with an asterisk (*) are required.

Payment Field configuration

Field Options

Name: Custom_Field

Display Name: New Customer Field *

Section: Custom Fields *

Field Type: Text *

Minimum Number of Characters:

Maximum Number of Characters: 64 *

Required: ☐

Show in Virtual Terminal: ☐

Can be changed on Payment Form: ☒

Show on Payment Form: ☒

Show in Receipt: ☐

Show in Email to Customer: ☐


Show in Email to Merchant: ☐

Forward on Approval: ☐

Forward on Decline: ☐

Update Delete Cancel

Message from webpage

 Are you sure you want to delete this field?

OK

Cancel

3. Click **OK**.

The system removes the payment field from the list and indicates that field deleted successfully.

Payment Fields

This form is used to update the field use and order.

New Customer Field - Payment field Deleted successfully.

Payment Field Setup

				System Field
▲ ▼	Account Data/MICR Data	Yes	ssl_account_data	System Field
▲ ▼	Expiration	Yes	date	System Field

Add New Field

Add New Section

To Edit Payment Fields

1. On the **Payment Fields** screen, click on the field you want to update.

The **Update Payment Field** screen displays the selected field.

Update Payment Field

This form is used to update a payment field. Note that all fields with an asterisk (*) are required.

Payment Field configuration

Field Options

Name:	ssl_email
Display Name:	Email Address *
Section:	Billing Address *
Field Type:	Text *
Minimum Number of Characters:	
Maximum Number of Characters:	100 *
Required:	<input type="checkbox"/>
Show in Virtual Terminal:	<input checked="" type="checkbox"/>
Can be changed on Payment Form:	<input checked="" type="checkbox"/>
Show on Payment Form:	<input checked="" type="checkbox"/>
Show in Receipt:	<input checked="" type="checkbox"/>
Show in Email to Customer:	<input checked="" type="checkbox"/>
Show in Email to Merchant:	<input checked="" type="checkbox"/>
Forward on Approval:	<input checked="" type="checkbox"/>
Forward on Decline:	<input checked="" type="checkbox"/>

Update

Cancel

Note: The settings on this screen define how the field is presented on both the Virtual Terminal screens and the Converge **Payment Form**. It also identifies whether the field should be used on the email responses for approved and declined notifications.

2. Make your changes and click **Update**.

The **Payment Fields** screen displays and indicates that your update was successful.

Payment Fields

This form is used to update the field use and order.

Email Address - Payment field Updated successfully.

Payment Field Setup			
Account Data/MICR Data	Yes	ssl_account_data	System Field
Expiration Date	Yes	ssl_expire_date	System Field

To Rearrange Payment Fields

You can use the arrows to the left of the fields to rearrange the display of the section or the fields on both the Converge user interface and the payment form.

1. Click the up or down arrow on the section address bar to move that section on both the Converge user interface and the payment form.

Payment Fields

This form is used to update the field use and order.

Payment Field Setup			
Address		ssl_email	System Field
Add New Field			
Ship to Company	No	ssl_ship_to_company	System Field
Ship to First Name	No	ssl_ship_to_first_name	System Field
Ship to Last name	No	ssl_ship_to_last_name	System Field
Ship to Address1	No	ssl_ship_to_address1	System Field
Ship to Address2	No	ssl_ship_to_address2	System Field
Ship to City	No	ssl_ship_to_city	System Field
Ship to State/Province	No	ssl_ship_to_state	System Field
Ship to Country	No	ssl_ship_to_country	System Field
Ship to Phone	No	ssl_ship_to_phone	System Field
Add New Field			
Custom Field 1	No	cust_1	System Field
CustomData1	No	CustomData1	
Add New Field			
Add New Section			

The following example shows the **Custom Fields** section moved before the **Shipping Address** in the user interface.

Credit Card Sale

Enter the Information for this transaction. Note that all fields with an asterisk (*) are required.

Sale

Phone:

Custom Fields

Custom Field 1:

CustomData1:

Shipping Address

Same as billing ☐ Yes

Ship to Company:

Ship to First Name:

Ship to Last name:

Ship to Address1:

Ship to Address2:

Ship to City:

Ship to State/Province:

Ship to Country:

Ship to Phone:

Process **Cancel**

- Click the up or down arrow on the field row to move that field on both the Converge user interface and the payment form.

Payment Fields

This form is used to update the field use and order.

Payment Field Setup

				System Field
▲ ▼	Company	No	ssl_company	System Field
▲ ▼	First Name	No	ssl_first_name	System Field
▲ ▼	Last name	No	ssl_last_name	System Field
▲ ▼	Address1	No	ssl_avs_address	System Field
▲ ▼	Address2	No	ssl_address2	System Field
▲ ▼	City	No	ssl_city	System Field
▲ ▼	State/Province	No	ssl_state	System Field
▲ ▼	Postal Code	No	ssl_avs_zip	System Field
▲ ▼	Country	No	ssl_country	System Field
▲ ▼	Phone	No	ssl_phone	System Field
▲ ▼	Email Address	No	ssl_email	System Field

Add New Field

				System Field
▲ ▼	Ship to C	No	to_com	System Field

The following example shows the **Email Address** field moved before the **Address1** field in the user interface.

Credit Card Sale

Enter the Information for this transaction. Note that all fields with an asterisk (*) are required.

Sale

Order Section

Account Data: 41*****9990

Expiration Date(MMY): 1215

Amount: *

Customer Code:

Sales Tax:

Billing Address

Company:

First Name: Jane

Last name: Doe

Email Address:

Address1:

Address2:

City:

State/Province:

Postal Code:

Country: Please select a Country

Phone:

Fields

To Add New Payment Sections

1. On the bottom of the **Payment Fields** screen, click **Add New Section**.

The screenshot displays the 'Payment Fields' configuration interface. At the top, the title 'Payment Fields' is followed by the instruction: 'This form is used to update the field use and order.' Below this is a 'Payment Field Setup' section containing a table of existing fields. The table has columns for field name, type, and status. One visible row is 'Account Data' with type 'Data' and status 'Yes'. Below the table, there are two buttons: 'Add New Field' and 'Add New Section'. The 'Add New Section' button is highlighted with a red circle, indicating the action to be taken.

Field Name	Type	Status
Account Data	Data	Yes

The **Add New Payment Section** screen displays.

Add New Payment Section

This form is used to add a new payment section. Note that all fields with an asterisk (*) are required.

New Payment Section configuration

Section Options

Name: *

Display Name: *

Show in Virtual Terminal: ☐

Show on Payment Form: ☐

Show in Receipt: ☐

Show in Email to Customer: ☐

Show in Email to Merchant: ☐

Add New Section **Cancel**

2. Enter the name of the new section, without spaces, in the **Name** field.
3. Enter the **Display Name** for the new section.
4. Select required check boxes to specify where the new section will display.
5. Click **Add New Section** to save the new section parameters.

The system displays a message that confirms that the new section added successfully, and the new section appears at the bottom of the screen.

Payment Fields

This form is used to update the field use and order.

Second Custom Section - Payment section Added successfully.

Order Section	Required	OrderSection	System Field
Account Data/MICR Data	Yes	ssl_account_data	System Field
Bank Account	Yes	bank_account	System Field
Customer Data 1	No	cust_1	System Field
Second Custom Section	Required	new_custom_section	System Field

Buttons: Add New Field, Add New Section

- To change the order of the sections, select the up or down arrows in the title bar of the section.

To Edit Payment Sections

- On the **Payment Fields** screen, click on the section name you want to edit.

The **Update Payment Section** screen displays the current information for the section.

- Make your changes and click **Update Section**.

The **Payment Fields** screen displays and indicates that your update was successful. The updated section is highlighted.

Payment Fields

This form is used to update the field use and order.

New Customer Field - Payment field Updated successfully.

Payment Field Setup

Order Section	Required	OrderSection	System Field
Account Data/MICR Data	Yes	ssl_account_data	System Field
Bank Account	Yes	bank_account	System Field

Add New .

Custom Fields	Required	CustomFields	System Field
New Customer Field	Yes	Custom_Field	

Add New Field

Second Custom Section	Required	New_Custom_Section	System Field
-----------------------	----------	--------------------	--------------

Add New Field

Add New Section

To Delete Payment Sections

1. On the **Payment Fields** screen, click on the section you want to delete.

Payment Fields

This form is used to update the field use and order.

Payment Field Setup

System Field
Account Data/MICR Data Yes ssl_account_data System Field
Expiration Date(MMYY) Yes ssl_exp_date System Field
Amount Yes ssl_amount System Field
Card Present No card_present System Field
Ship to Phone no ssl_ship_to_phone System Field
Custom Field 1 No cust_1 System Field
CustomData1 No CustomData1
System Field

Add New Field

Add New Field

Add New Field

Add New Section

Notes:

- All fields must be removed before a section can be deleted.
- Only user defined sections can be deleted.

The **Update Payment Section** screen displays the selected section information.

Update Payment Section

This form is used to update a payment section. Note that all fields with an asterisk (*) are required.

Existing Payment Section configuration

Section Options

Name: New_Custom_Section

Display Name: Second Custom Section *

Show in Virtual Terminal: ☐

Show on Payment Form: ☐

Show in Receipt: ☐

Show in Email to Customer: ☐

Show in Email to Merchant: ☐

Update Section **Delete** **Cancel**

2. Click **Delete**.

The following message displays to confirm if the field should be deleted.

Message from webpage

Are you sure you want to delete this section?

OK **Cancel**

3. Click **OK**.

The system removes the payment section from your form and indicates that deletion was successful.

Payment Fields

This form is used to update the field use and order.

Second Custom Section - Payment section Deleted successfully.

Payment Field Setup			
			System Field
Account Data/MICR Data	Yes	ssl_account_data	System Field
Expiration Date (MMYY)	Yes	exp_date	System Field
Amount	Yes	amt	System Field

Configuring Your Printer

The **Printer Configuration** function allows you to configure the receipt printing options for Converge. Printer options define the output generated upon a successful authorization attempt.

Note: It is very important to note that to print receipts, you must set up your Internet browser to accept pop-ups from Converge before you begin transaction processing (refer to the **Systems Requirements** section in the *Converge Getting Started Guide*).

To set up your printer, you have to access the **Printer Configuration** screen.

1. Select **Terminal | Merchant | Printer**.

The **Printer Configuration** screen displays.

Printer Configuration

This form is used to configure all of the printer options.

Printer Configuration

Printer Options

Printer Type: Parallel Printer

Paper Type: Single Ply

Receipt Header Options

Header Line 1:

Header Line 2:

Header Line 3:

Header Line 4:

Header Line 5:

Header Line 6:

Header Line 7:

Header Line 8:

Header Line 9:

Header Line 10:

Header Line 11:

Header Line 12:

Header Line 13:

Header Line 14:

Header Line 15:

Header Line 16:

Header Line 17:

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The **Printer Configuration** screen is divided into the following sections:

- Printer Options
- Receipt Header Options
- Receipt Trailer Options
- Receipt Custom Fields

To Set Up Receipt Header Options

2. In the **Printer Type** drop-down list, select one of the following:
 - No Printer
 - Parallel Printer
 - Serial Printer
 - Star Printer

Options	Description
No Printer	<p>Select if you do not wish to print a transaction receipt.</p> <p>This option displays the authorization information on the Virtual Terminal Response screen.</p>
Parallel Printer	<p>Select if you wish to print a receipt to a parallel printer.</p> <p>This option launches a separate browser screen with the receipt information and sends the output to the default printer for the Internet browser. You must then select the Print button in the pop-up window or use the browser's print feature.</p>
Serial Printer	<p>Select if you wish to print to a serial printer connected to a configured serial (COM) port using the Epson T20 printer.</p> <p>In order for the Serial printer function to work, you must successfully install the Epson T20 drivers from the Support page using Device Assistant.</p> <p>Refer to the <i>Converge Peripheral Device Installation and Setup Guide</i> for more information.</p>
Star Printer	<p>Select if you wish to print using the Star Micronics TSP6500II printer device.</p> <p>For the Star Printer function to work, you must successfully install the Star printer driver from the Support page using ConvergeConnect.</p> <p>Refer to the <i>Converge Peripheral Device Installation and Setup Guide</i> for more information.</p>

3. In the **Paper Type** drop-down list, select one of the following:

- Single Ply
- Multi Ply

Notes:

- When you select **Serial Printer** as the printer type:
 - Select **Single Ply** for 1 ply thermal style printers. This option prints the customer and merchant receipts separately.
 - Select **Multi Ply** for 2 ply impact style printers. This option prints the customer and merchant receipts at once with one copy per paper ply.
 - When you select **Parallel Printer** as the printer type:
 - **Single Ply** prints the customer and merchant receipts side by side on a single sheet of paper (8 1/2"x11").
 - **Multi Ply** prints the customer and merchant receipts on 2 separate pages (1 per page, 8 1/2"x11").
 - When you select **Star Printer** as the printer type:
 - Select **Single Ply** for 1 ply thermal style printers. This option prints the customer and merchant receipts separately.
 - Select **Multi Ply** for 2 ply impact style printers. This option prints the customer and merchant receipts at once with one copy per paper ply.
-

To Set Up Receipt Header Options

Receipt Header Options configures the structure for the receipt header. To enable or disable the printing of each header line, you can add or remove data from the **Header Line** field.

4. In the **Receipt Header Options** section, in the header text **Justification** drop down select from the following to determine the placement of the text on the receipt:
- Left
 - Center
 - Right

5. In the **Receipt Header Options** section you can display up to five lines of text. An example would be the merchant's address, phone, and/or Website address.

Receipt Header Options		Justification Left
Header Line 1	<input type="text" value="Header Left Justified"/>	
Header Line 2	<input type="text" value="Header Left Justified"/>	
Header Line 3	<input type="text" value="Header Left Justified"/>	
Header Line 4	<input type="text"/>	
Header Line 5	<input type="text"/>	

To Set Up Receipt Trailer Options

Receipt Trailer Options configures the structure for the receipt footer. To enable or disable the printing of each footer line, you can add or remove data from the **Trailer Line** field.

6. In the **Receipt Trailer Options** section, in the header text **Justification** drop down select from the following to determine the placement of the text on the receipt:
- Left
 - Center
 - Right
7. In the **Receipt Trailer Options** section you can display up to two lines of text. An example would be a thank you message to the customer.

Receipt Trailer Options		Justification Right
Trailer Line 1	<input type="text" value="Trailer Right Justified"/>	
Trailer Line 2	<input type="text" value="Trailer Right Justified"/>	

To Set Up Receipt Custom Fields

Receipt Custom Options configures up to ten (10) additional user-defined fields to appear on either the parallel or serial receipts.

Receipt Custom Fields			
Custom Label 1	<input type="text" value="Custom Label 1"/>	Custom Field	<input type="text" value="Custom Field 1"/>
Custom Label 2	<input type="text" value="Custom Label 2"/>	Custom Field	<input type="text" value="Custom Field 1"/>
Custom Label 3	<input type="text" value="Custom Label 3"/>	Custom Field	<input type="text" value="Custom Field 1"/>
Custom Label 4	<input type="text"/>	Custom Field	<input type="text"/>
Custom Label 5	<input type="text"/>	Custom Field	<input type="text"/>
Custom Label 6	<input type="text"/>	Custom Field	<input type="text"/>
Custom Label 7	<input type="text"/>	Custom Field	<input type="text"/>
Custom Label 8	<input type="text"/>	Custom Field	<input type="text"/>
Custom Label 9	<input type="text"/>	Custom Field	<input type="text"/>
Custom Label 10	<input type="text"/>	Custom Field	<input type="text"/>

8. Enter descriptive label must be entered in the **Custom Label** field.
9. To link to a defined custom field, select a value from the **Custom Field** drop-down list.

Receipt Custom Fields			
Custom Label 1	<input type="text" value="Custom Label 1"/>	Custom Field	<input type="text" value="Custom Field 1"/>
Custom Label 2	<input type="text" value="Custom Label 2"/>	Custom Field	<input type="text" value="Custom Field 1"/>
Custom Label 3	<input type="text" value="Custom Label 3"/>	Custom Field	<input type="text"/>
Custom Label 4	<input type="text"/>	Custom Field	<input type="text"/>
Custom Label 5	<input type="text"/>	Custom Field	<input type="text"/>
Custom Label 6	<input type="text"/>	Custom Field	<input type="text"/>
Custom Label 7	<input type="text"/>	Custom Field	<input type="text"/>
Custom Label 8	<input type="text"/>	Custom Field	<input type="text"/>
Custom Label 9	<input type="text"/>	Custom Field	<input type="text"/>
Custom Label 10	<input type="text"/>	Custom Field	<input type="text"/>

10. Click **Update**.

The **Printer Configuration** screen indicates that your update was successful.

Printer Configuration

This form is used to configure all of the printer options.

Update succeeded.

Printer Configuration

Printer Options

Printer Type:

Printer Model:

The following receipt example illustrates steps 1 through 10 applied:

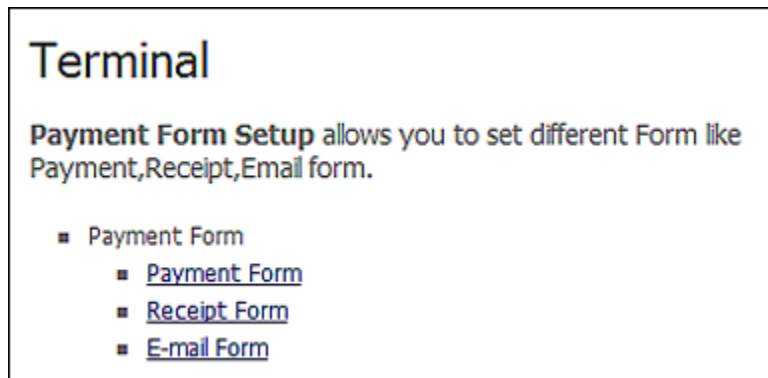
Header Left Justified	Header Left Justified
Header Left Justified	Header Left Justified
Header Left Justified	Header Left Justified
E4 US Retail	E4 US Retail
0017340009997772229998	0017340009997772229998
Date: 08/05/2014 02:37:59 PM	Date: 08/05/2014 02:37:59 PM
CREDIT CARD SALE	CREDIT CARD SALE
CARD NUMBER: *****9990 S	CARD NUMBER: *****9990 S
TRAN AMOUNT: \$1.00	TRAN AMOUNT: \$1.00
APPROVAL CD: CVI852	APPROVAL CD: CVI852
RECORD #: 000	RECORD #: 000
CLERK ID: Clerk1	CLERK ID: Clerk1
Custom Label 1: My Custom Field Data	Custom Label 1: My Custom Field Data
Custom Label 2: My Custom Field Data	Custom Label 2: My Custom Field Data
Custom Label 3: My Custom Field Data	Custom Label 3: My Custom Field Data
X _____	Trailer Right Justified
Jane Doe	Trailer Right Justified
I AGREE TO PAY THE ABOVE TOTAL AMOUNT ACCORDING TO THE CARD ISSUER AGREEMENT (MERCHANT AGREEMENT IF CREDIT VOUCHER)	Customer Copy
Trailer Right Justified	
Trailer Right Justified	
Merchant Copy	

Note: For placement of custom fields on the receipt, refer to the [To Rearrange Payment Fields](#) section.

Setting Up Payment Forms

This function allows you to set up the following forms:

- Payment Form
- Receipt Form
- E-mail Form



Configuring Payment Forms

The **Payment Form Setup** screen allows you to change the basic structure of the HTML payment form used for an e-Commerce site.

To configure your payment form, you can:

- Create header and footer text
- Edit and delete header and footer text
- Edit the form color
- Add header logo and background images to display on your payment form
- Set alignment for header logo on your payment form
- Remove header logo and background images from your payment form
- Preview the payment form

To Create Header and Footer Text

1. Select **Terminal** | **Payment Form** | **Payment Form**.

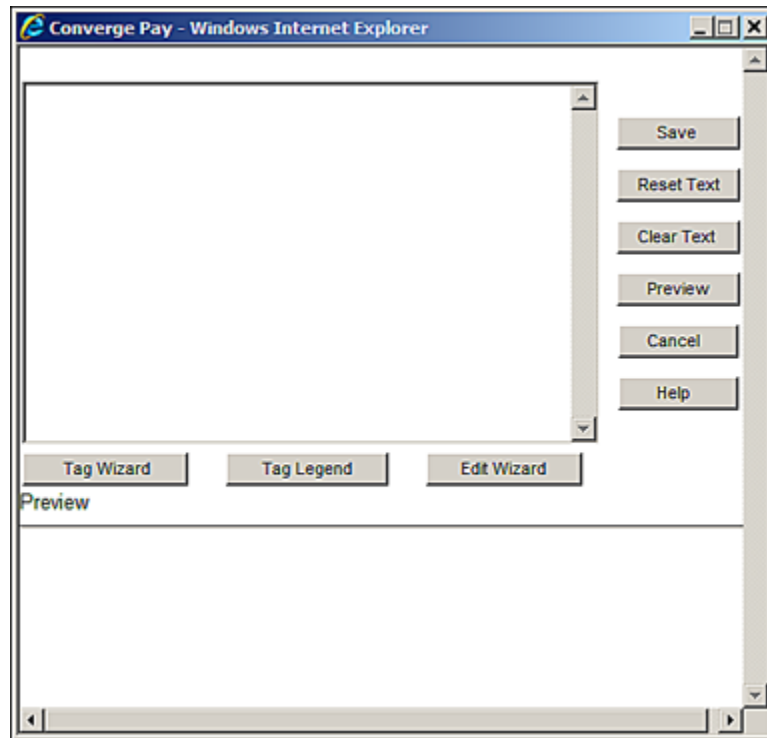
The **Payment Form** displays.

The screenshot shows the 'Payment Form' configuration interface. At the top, the title 'Payment Form' is displayed, followed by a description: 'This section is used to configure the display options of the consumer payment form.' Below this is the 'Payment Form Setup' section, which is divided into three main areas: 'Payment form Header Footer', 'Payment form Color', and 'Payment form Images'. In the 'Payment form Header Footer' section, there are two text input fields: 'Payment Form Header' and 'Payment Form Footer'. To the right of each field is an 'Editor' button; the 'Editor' button for the 'Payment Form Header' is circled in red. The 'Payment form Color' section contains five rows of color configuration, each with a label, a color dropdown menu, and an 'RGB Value' field. The colors are: Body Background (White, #FFFFFF), Body and Table Text (Black, #000000), Table Header and Border (Blue, #294984), Table Header Text and Background (White, #FFFFFF), and Html Hyperlink Tags (Blue, #0000FF). To the right of the color section is a 'Preview' area showing a visual representation of the payment form header, including a blue 'Header' bar, a 'Table' with 'background / text', and a blue 'Link'. The 'Payment form Images' section includes three fields: 'Header Logo Image' (None Selected, with a 'Browse...' button), 'Header Logo Justification' (radio buttons for Left, Center, and Right, with 'Left' selected), and 'Background Image' (None Selected, with a 'Browse...' button). At the bottom of the form are four buttons: 'Update', 'Cancel', 'Restore Defaults', and 'Preview'.

2. Click the **Editor** button to the right of **Payment Form Header**.

Note: The same steps apply to configure the form footer.

The **Text Editor** screen displays.



Note: You have two options to configure your **Payment Form Header: Text Editor** window or the **Tag Wizard** button.

To Configure Your Payment Form Header using the Text Editor Window

1. Enter the text you want to appear on the form header.

Note: The same steps apply to configure the form footer.

2. Click **Preview** to view the text as it will appear in the header.
3. Click **Save** to save the text.

The **Text Editor** screen closes and the text you entered displays on the **Payment Form** screen.

Payment Form

This section is used to configure the display options of the consumer payment form.

Payment Form Setup	
Payment form Header Footer	
Payment Form Header	ABC Company 123 Main St. Any City, Any State 99999 999-999-9999 <input type="button" value="Editor"/>
Payment Form Footer	<input type="text"/> <input type="button" value="Editor"/>

Notes:

- Click **Clear Text** or **Reset Text** if you need to remove unsaved text from the **Text Editor** screen.
- Click **Cancel** to close the **Text Editor**, cancel or delete unsaved work.
- Click **Help** to display the help page for the **Text Editor** page.

To Configure Your Payment Form Header Using the Tag Wizard Button

1. Click **Tag Wizard** to enter header text.

Note: The same steps apply to configure the form footer.

The **Tag Wizard** screen displays.

Converge Pay - Windows Internet Explorer

Enter Text Here:

Line Attributes:

In-Line Text: ☒ Line Break: ☐
Paragraph: ☐

Text Attributes:

Font: Custom Color (RGB):
Color: #
Size:
Bold: ☐
Italic: ☐
Underline: ☐
Insert
Reset
Cancel

Note: **Tag Wizard** defines the properties of text in either the header or the footer messages.

2. In the **Enter Text Here** text box, enter the basic text to add to the header or footer.
3. In the **Line Attributes** section, select the option to define how the text entered into the previous box appears on the form.

4. In the **Text Attributes** section, select text attributes to define display properties of the text.

The screenshot shows a web browser window titled "Converge Pay - Windows Internet Explorer". The main content area is titled "Enter Text Here:" and contains a text box with the following text: "ABC Company", "123 Main St.", "Any City, Any State 99999", and "999-999-9999". Below the text box are three sections: "Line Attributes:", "Text Attributes:", and "Custom Color (RGB):". The "Line Attributes:" section has radio buttons for "In-Line Text" (selected) and "Paragraph", and a dropdown for "Alignment" set to "Center". The "Text Attributes:" section has dropdowns for "Font" (set to "Arial") and "Size" (set to "Large"), and checkboxes for "Bold" (checked), "Italic" (unchecked), and "Underline" (unchecked). The "Custom Color (RGB):" section has a color dropdown set to "Green" and a text box for the hex code "#008000". There are "Insert", "Reset", and "Cancel" buttons at the bottom right of the form.

5. Click **Insert**.

The screen closes and the text you entered displays along with the attributes you selected in the **Text Editor** screen.

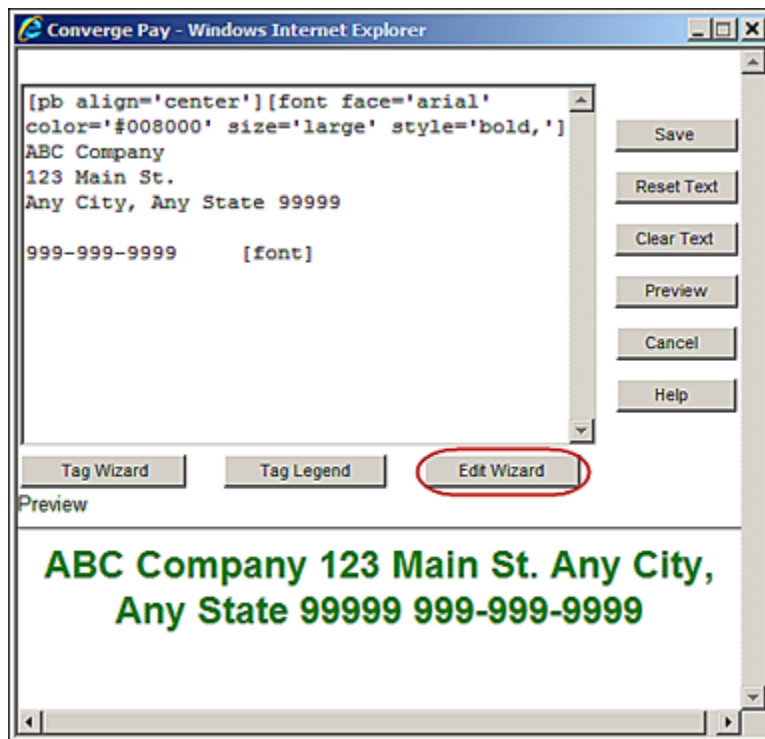
6. Click the **Save** button to save the text.

To Edit and Delete Header and Footer Text

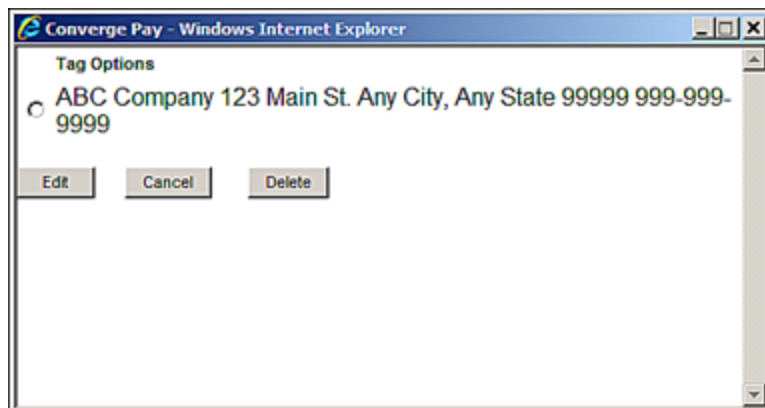
1. Click on the **Editor** button to the right of **Payment Form Header**.

Note: The same steps apply to configure the form footer.

2. On the **Text Editor** screen, click **Edit Wizard**.



The following screen displays.



3. Select the radio button next to the **Tag Options** you want to edit.
4. Click **Edit** to revise, **Delete** to remove the tag, or **Cancel** to return to the previous screen.

5. If you choose **Edit**, the **Text Editor** screen displays for you to revise and save your new header or footer.
6. If you chose **Delete**, the **Text Editor** screen displays. Click **Save** and the system removes the header or footer.

To Edit the Payment Form Color

Under **Payment Form Color** on the **Payment Form Setup** screen, make your modifications as desired. Changes appear in the **Preview** section as shown below. Colors can be either selected from the drop-down list or you can enter the RGB color value in the free text field.

To Add a Header Logo to Display on Payment Form

1. Under **Payment Form Images** on the **Payment Form Setup** screen, click the **Browse** button and select an image for the **Header Logo Image**.

2. Click **Update**.

The image filename displays along with a message that states that the payment form updated successfully. In addition, the **Remove** button displays, which enables you to remove the logo.

Notes:

- If you try to upload an image that the file type is not supported you will receive an error message.
- The supported file types are jpg, jpeg, or gif.

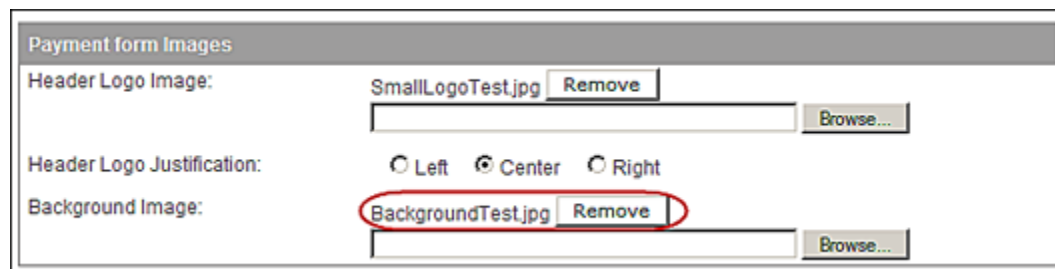
3. Select **Left**, **Center**, or **Right** to align the logo as desired and click **Update**.

Note: The default alignment of the logo set up for a terminal as left justified.

To Add a Background Image to Display on Payment Form

1. Under **Payment Form Images** on the **Payment Form Setup** screen, click the **Browse** button and select an image for the **Background Image**.
2. Click **Update**.

The image filename displays along with a message that states that the payment form updated successfully. In addition, the **Remove** button displays, which enables you to remove the background image.

**Notes:**

- If you try to upload an image that the file type is not supported you will receive an error message.
- The supported file types are jpg, jpeg, or gif.

To Remove Header Logo and Background Images from Payment Form

1. Under **Payment Form Images** on the **Payment Form Setup** screen, to remove a header logo image or the background image, click the **Remove** button.



Payment form Images

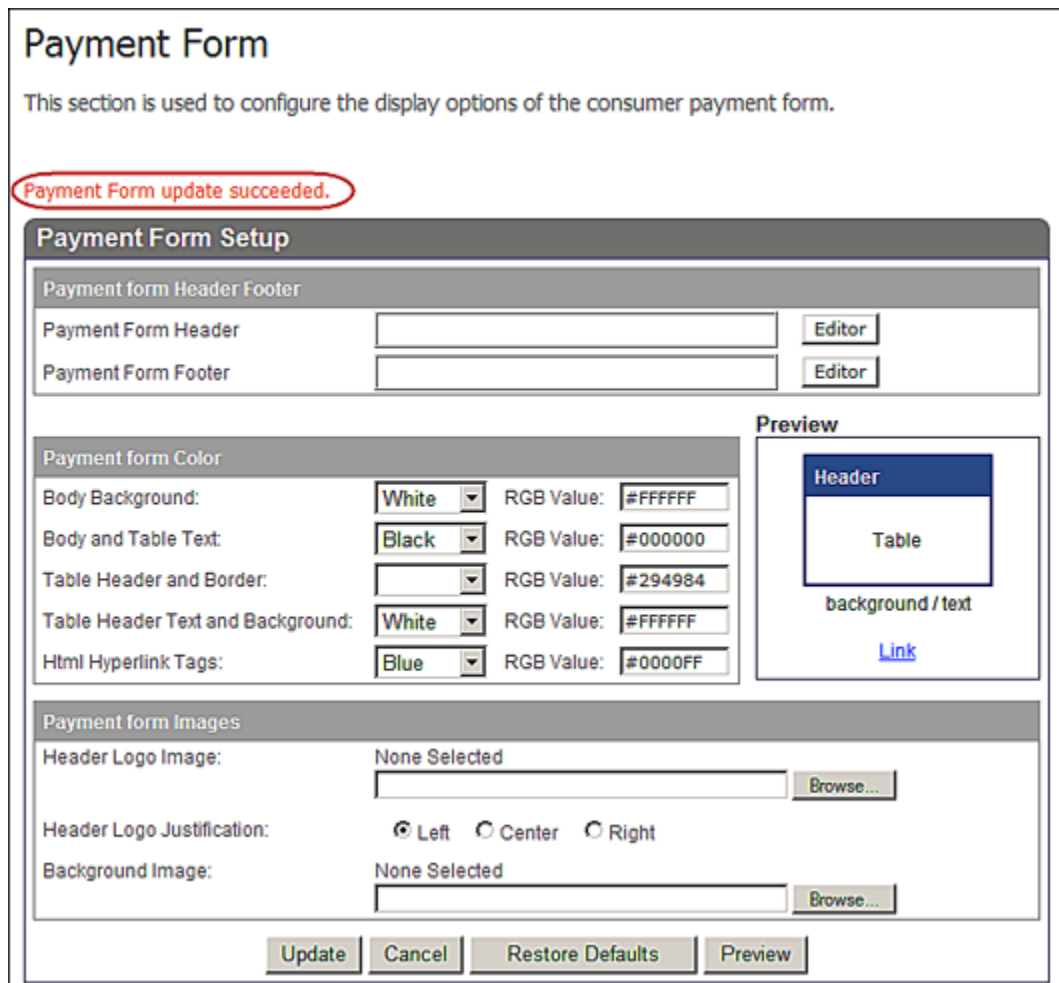
Header Logo Image: SmallLogoTest.jpg **Remove** Browse...

Header Logo Justification: ☐ Left ☒ Center ☐ Right

Background Image: None Selected Browse...

2. Click **Update**.

The system removes the image and displays a message that states that the payment form updated successfully.



Payment Form

This section is used to configure the display options of the consumer payment form.

Payment Form update succeeded.

Payment Form Setup

Payment form Header Footer

Payment Form Header Editor

Payment Form Footer Editor

Payment form Color

Body Background: White RGB Value: #FFFFFF

Body and Table Text: Black RGB Value: #000000

Table Header and Border: RGB Value: #294984

Table Header Text and Background: White RGB Value: #FFFFFF

Html Hyperlink Tags: Blue RGB Value: #0000FF

Preview

Header

Table

background / text

Link

Payment form Images

Header Logo Image: None Selected Browse...

Header Logo Justification: ☒ Left ☐ Center ☐ Right

Background Image: None Selected Browse...

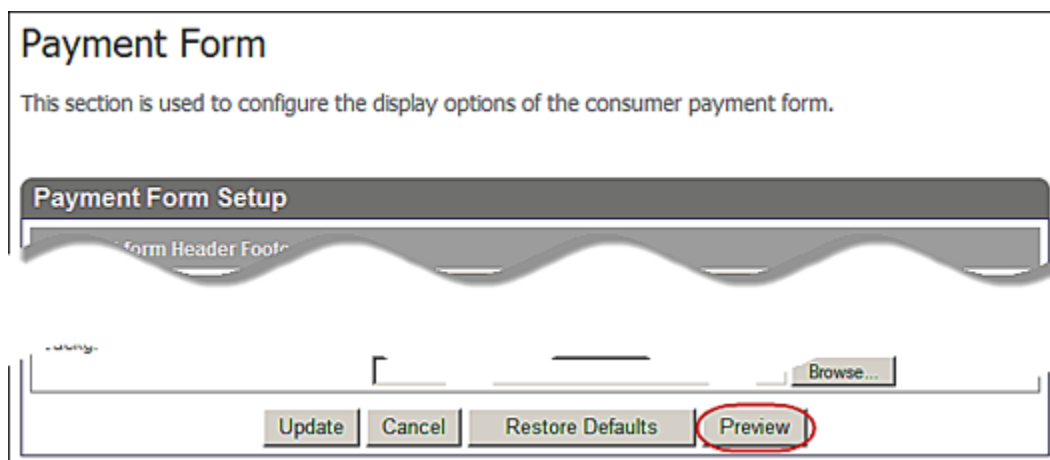
Update Cancel Restore Defaults Preview

Notes:

- Editing can be performed at one time or to individual sections and then click **Update** when completed.
 - To remove all editing at once click **Restore Defaults**.
-

To Preview Payment Form

To view the payment form as it will be displayed to a consumer, select the **Preview** button at the bottom of the screen.



The screenshot shows a web interface for configuring a payment form. At the top, the title "Payment Form" is displayed, followed by a descriptive text: "This section is used to configure the display options of the consumer payment form." Below this is a section titled "Payment Form Setup" which contains a preview of the form's header and footer. At the bottom of the interface, there is a row of four buttons: "Update", "Cancel", "Restore Defaults", and "Preview". The "Preview" button is highlighted with a red circle.

The following payment form example illustrates the preceding steps applied:

TEST MODE

converge
FORBID TO REFUSE, REFUSE NOT

ABC Company 123 Main St. Any City, Any State 99999 999-999-9999

SALE

Order Section

Account Data: *

Expiration Date: *

Custom Fields

CustomData1:

Close

Thank you for your business!

Configuring Receipt Forms

The **Receipt Form** screen configures the options to accurately display the transaction authorization results from the Converge payment form.

1. Select **Terminal | Payment Form | Receipt Form**.

The **Receipt Form** displays.

The screenshot shows the 'Receipt Form' configuration window. At the top, it says 'Receipt Form' and provides a note: 'This section is used to configure the display options of the consumer receipt form. Note that all fields with an asterisk (*) are required.' Below this is the 'Consumer Receipt Setup' section, which contains three sub-sections: 'Receipt Form - Approval', 'Receipt Form - Declined', and 'Receipt Form - Error URL'. Each sub-section has fields for 'Link Method' (a dropdown menu), 'Button Text' (a text field with a red asterisk indicating it is required), 'URL' (a text field), 'Receipt Header' (a text field with an 'Editor' button), and 'Receipt Footer' (a text field with an 'Editor' button'). At the bottom of the window are three buttons: 'Update', 'Cancel', and 'Restore Defaults'.

2. Enter relevant information in the **Receipt Form - Approval** section.

Notes:

- This section is used to identify how the authorization response page is handled from the Converge payment form for approved transactions.
 - **Only Button Text** is required. All other fields are optional.
 - For **Link Method** options refer to the [Receipt Form Table Options](#) for more information.
-

3. Enter relevant information in the **Receipt Form - Declined** section.

Notes:

- This section identifies how the authorization response page is handled from the Converge payment form for declined transactions.
 - Only **Button Text** is required. All other fields are optional.
 - For **Link Method** options refer to the [Receipt Form Table Options](#) for more information.
-

4. Enter relevant information in the **Receipt Form – Error** URL section.
5. Click **Update**.

Receipt Form Option Table:

Options	Description
Link Method	<p>This selection offers four methods to create the receipt link.</p> <ul style="list-style-type: none">• Hyperlink Displays the link back to the Web site specified in the URL field as a text link on the Converge response page.• Form GET Displays the link back to the Web site specified in the URL field as a button on the Converge response page. The response data is returned to the site in the form of a GET.• Form POST Displays the link back to the Web site specified in the URL field as a button on the Converge response page. The response data is returned to the site in the form of a POST.• Get Redirect Re-directs the response from the Converge payment form to the URL defined in the URL field in the form of a GET.
Button Text	<p>Allows you to specify the text that appears as the link on your Web site or response page. This option is only applicable for the Hyperlink, Form GET and Form POST Link Method options.</p>

Options	Description
URL	Allows you to attach a URL address on your receipts to give your customer' easy access back to your Web site. You have three protocol options for your URL: <ul style="list-style-type: none">• HTTP Hyper Text Transfer Protocol• HTTPS Hyper Text Transfer Protocol Secure• FTP File Transfer Protocol
Receipt Header	Allows you to add a customized message that appears at the top of the declined transaction response page.
Receipt Footer	Allows you to add a customized message to appear at the bottom of the declined transaction response page.

Configuring Email Options

To configure your email options, you may do the following:

- Set up your email notifications
- Restore default settings

Select **Terminal** | **Payment Form** | **E-mail Form**.

The **Email Setup Form** displays.

Email Setup Form

This section is used to configure the email options.

Email Notification Setup

Email Options Approval

☐ Notify Merchant of Transaction Approval

☐ Notify Customer of Transaction Approval

Email Header

Email Footer

Subject Field

Email Options Decline

☐ Notify Merchant of Transaction Decline

☐ Notify Customer of Transaction Decline

Email Header

Email Footer

Subject Field

To Set Up Email Notification for Approved Transactions

Use the **Email Options Approval** section to determine who receives email notifications for approved transactions and to modify **Email Header**, **Email Footer**, **Subject**, and **Field** formats so custom messages can be presented.

1. To use the email address you specified in the **Merchant Information** section (refer to the [Setting Up Merchant Information](#) section), select the **Notify Merchant of Transaction Approval** check box to generate a merchant confirmation email upon approval.

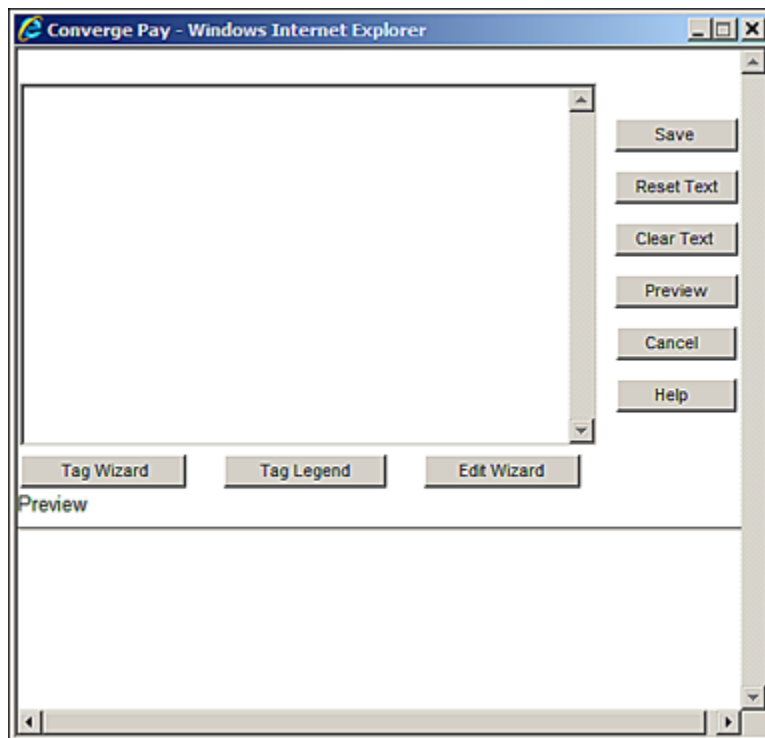
Note: If the check box is not selected, an approval confirmation email will not be sent to the merchant.

2. To use the email address specified by the customer during the transaction, select the **Notify Customer of Transaction Approval** check box to generate a customer approval email.

Note: If the check box is not selected, an approval email will not be sent to the customer.

3. To add a custom message at the top of the approval email, click the **Editor** button on the right side of the form next to the **Email Header** field.

The following dialog box displays.



For more information on how to use **Tag Wizard** or the **Edit Wizard** buttons refer to the [To Configure Your Payment Form Header Using the Tag Wizard Button](#) section.

4. Enter and **Save** your message.
5. To add a custom message at the bottom of the approval email, click the **Editor** button on the right side of the form next to the **Email Footer** field.

Enter and **Save** your message in the dialog box that displays.

6. To add a custom **Subject** line to the email, type in the message you want displayed in the subject line and select the **Field** you want displayed. You have the option to select the invoice, description, or any custom field you have setup for this terminal.

Note: To set up custom fields, refer to the [To Add New Payment Fields](#) section for more information.

To Set Up Email Notification for Declined Transactions

Use the **E-mail Options Decline** section to determine who receives email notifications for declined transactions and to modify email header and footer formats to customize messages.

1. To use the email address you specified in the **Merchant Information** section, select the **Notify Merchant of Transaction Decline** check box to generate a merchant email upon a transaction decline.

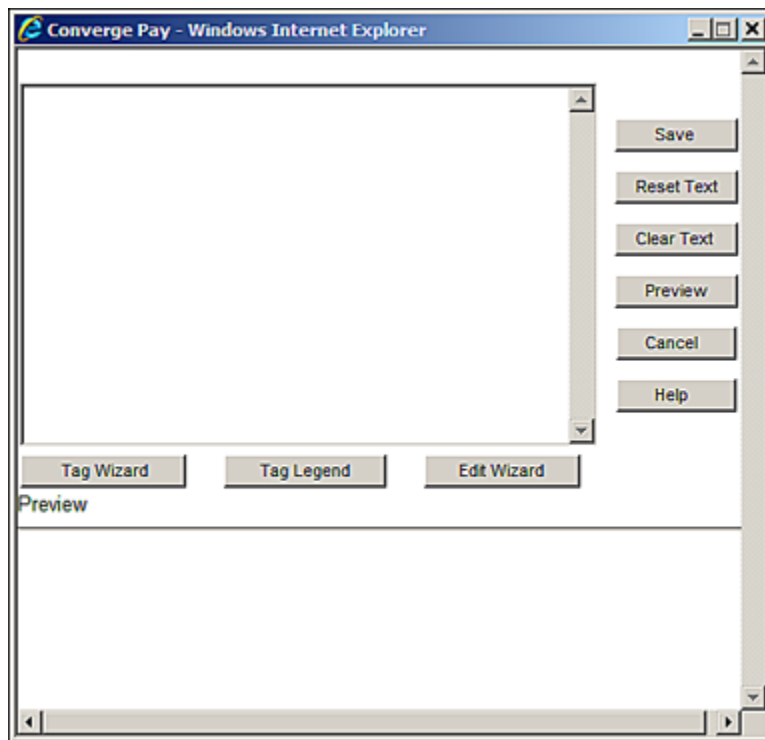
Note: If the check box is not selected, a decline confirmation email will not be sent to the merchant.

2. To use the email address specified by the customer during the transaction, select the **Notify Customer of Transaction Decline** check box to generate a customer decline email.

Note: If the check box is not selected, a decline email will not be sent to the customer.

3. To add a custom message at the top of the decline email, select the **Editor** button on the right side of the form next to the **Email Header** field.

The following dialog box displays.



For more information on how to use **Tag Wizard** or the **Edit Wizard** buttons refer to the [To Configure Your Payment Form Header Using the Tag Wizard Button](#) section.

4. Enter and **Save** your message in the dialog box that displays.
5. To add a custom message at the bottom of the decline email, select the **Editor** button on the right side of the form next to the **Email Footer** field.
6. Enter and **Save** your message in the dialog box that displays.
7. To add a custom **Subject** line to the email, type in the message you want displayed in the subject line and the **Field** you want displayed.

Note: You can add a custom field for your **Subject** line. Refer to the [To Add New Payment Fields](#) section for more information.

8. Click **Update** to save any modifications.

Note: Once you click **Update**, you cannot revert to the old information; however, you can click **Restore Defaults** to revert all of the fields to the Converge default values.

Setting Up Advanced Settings (Advanced Menu)

This section describes the following options:

- System Setup
- Error Messages
- Fraud Prevention Rules
- Business Rules

Terminal

The **Advance Setup** function allows you to set up the System and Error Messages.

- Advanced
 - [System Setup](#)
 - [Error Messages](#)
 - [Fraud Prevention Rules](#)
 - [Business Rules](#)

Configuring System Setup

System Setup allows you to:

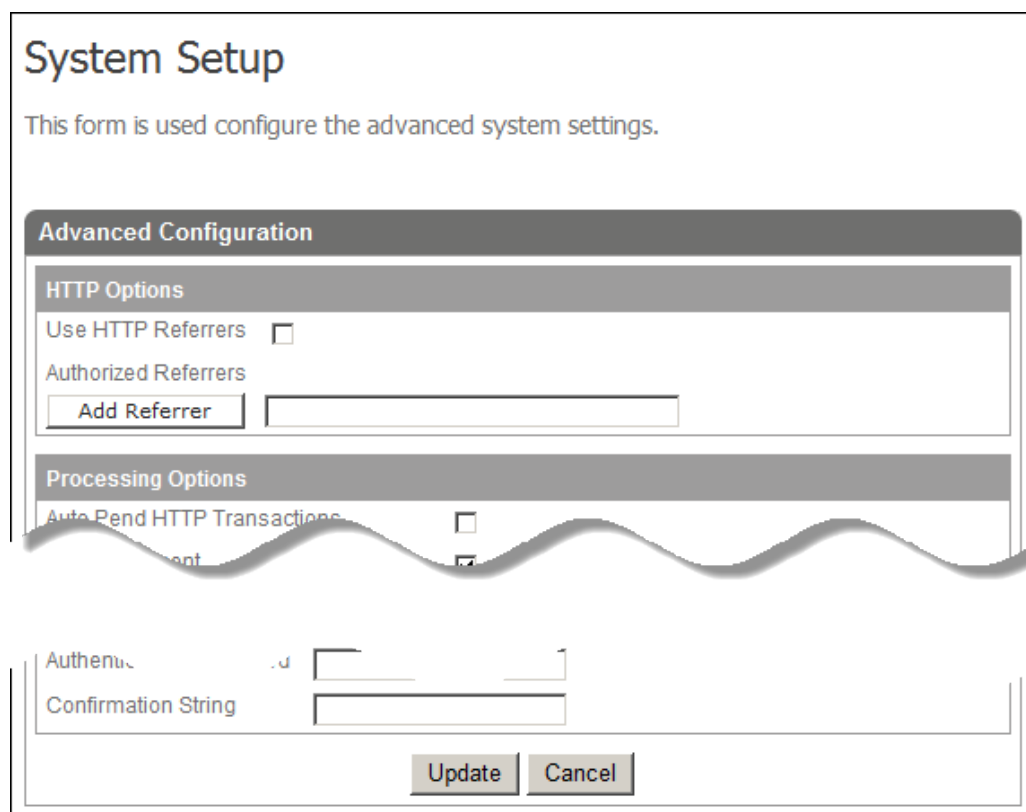
- Configure your HTTP options
- Configure your processing options
- Configure your device options
- Configure your Export options

To Configure Your HTTP Options

You can add HTTP referrers to the payment form.

1. Select **Terminal | Advanced | System Setup**.

The **System Setup** screen displays.



The screenshot shows the 'System Setup' form. At the top, it says 'System Setup' and 'This form is used to configure the advanced system settings.' Below this is a section titled 'Advanced Configuration'. Inside this section, there are two main areas: 'HTTP Options' and 'Processing Options'. Under 'HTTP Options', there is a checkbox for 'Use HTTP Referrers' which is currently unchecked. Below this is a label 'Authorized Referrers' and a text input field with an 'Add Referrer' button to its left. Under 'Processing Options', there is a checkbox for 'Auto Pend HTTP Transactions' which is currently unchecked. Below this is a label 'Confirmation String' and a text input field. At the bottom of the form, there are two buttons: 'Update' and 'Cancel'.

2. To be able to prevent all except authorized referrers from linking to your site, click the **Use HTTPS Referrers** check box.

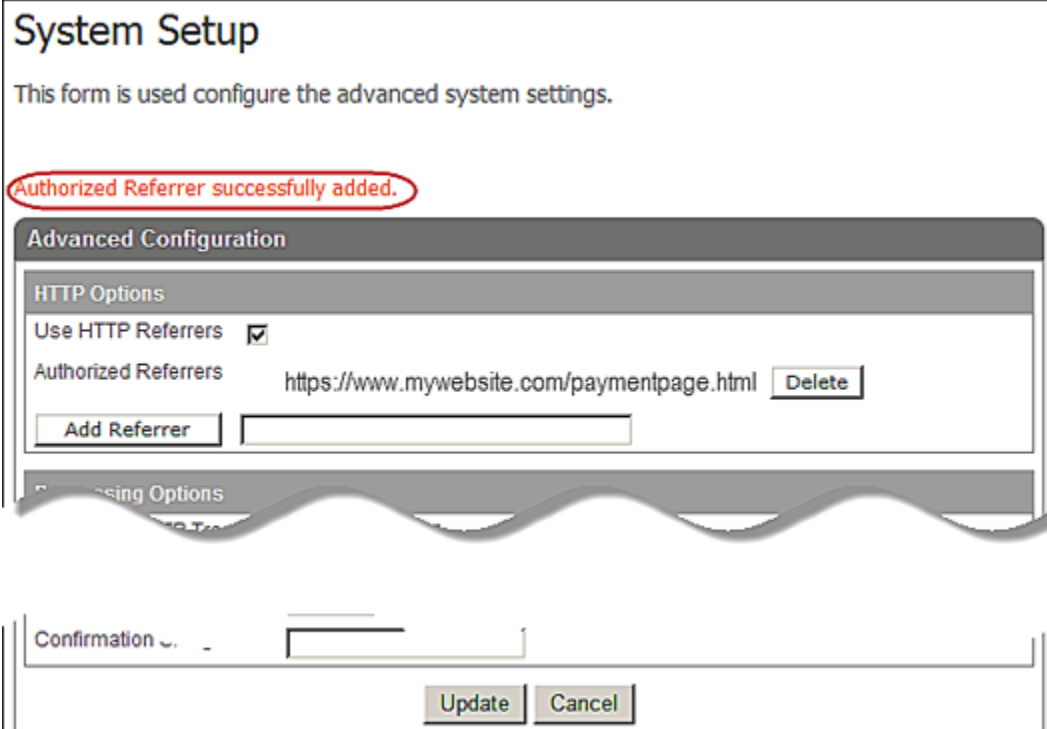
Notes:

- This assures you that only your Web site is sending transactions to your account.
- To be able to perform transactions from a Web site or integrated solution outside of the Converge Terminal, the **Enable HTTPS Transaction** check box needs to be enabled on the **Terminal Configuration** screen. Contact Customer Support to enable this flag.
- Refer to the *Converge Developer Guide* for details on Web site integration.

To Add a Referrer

1. To be able to select the sites that you wish to authorize to link to your site, type the full URL (include the http or https) into the **Add Referrer** field (for example, https://www.mywebsite.com/paymentpage.html).
2. Click the **Add Referrers** button.

The **System Setup** screen displays the URL added and a message that the update successfully added.



System Setup

This form is used configure the advanced system settings.

Authorized Referrer successfully added.

Advanced Configuration

HTTP Options

Use HTTP Referrers ☒

Authorized Referrers https://www.mywebsite.com/paymentpage.html

Processing Options

Confirmation

3. Click the **Update** button to update your system setup.

Notes:

- Add each referrer separately.
 - Choosing options can be performed at one time or to individual sections and then click **Update** when completed.
-

To Remove a Referrer

1. Click the **Delete** button to the right of the URL you want to delete.

The system removes the selected URL and displays a message that the referrer was successfully removed.

2. Click the **Update** button to update your system setup.

To Configure Your Processing Options

Your **Processing Options** allow you to:

- Set up an EMV capable terminal
- Set up an *e-Commerce* or *MOTO* terminal to accept encrypted hand key on device
- Set up an *e-Commerce* profile for 3D Secure
- Add a MasterPass wallet to a terminal (Canadian *e-Commerce* terminal)
- Create a schedule to automatically settle your transactions

To Set Up Terminal with an EMV Device

To set up an EMV capable profile for *retail* and *service* terminals, follow these steps:

1. Select a profile configured as a *retail* or *service* terminal from your list of available profiles.
2. Select **Terminal | Advanced | System Setup**.

The **System Setup** screen displays.

System Setup

This form is used to configure the advanced system settings.

Add Re. _____

Processing Options

Enable EMV Chip Cards	<input checked="" type="checkbox"/>
Auto Settlement	<input checked="" type="checkbox"/>
Auto Settlement Time (EST)	3 P.M. ▼
Settle Recurring Transactions Next Day	<input type="checkbox"/>

Confirm _____

Update Cancel

3. Under the **Processing Options** section, select the **Enable EMV Chip Cards** check box.
4. Click **Update** to save this system setting.

To Set Up Terminal with Encrypting Hand Key Device

To set up a terminal to accept encrypted keyed transactions using a device, follow these steps:

1. Select a profile configured as a *e-Commerce* or *MOTO* terminal from your list of available profiles.
2. Select **Terminal | Advanced | System Setup**.

The **System Setup** screen displays.

Processing Options	
Enable Encrypted Hand Key on Device	<input checked="" type="checkbox"/>
3D Secure	<input checked="" type="checkbox"/>
Auto Settlement	<input type="checkbox"/>
Auto Settlement Time (EST)	6 P.M. ▼
Settle Recurring Transactions Next Day	<input type="checkbox"/>

3. Under the **Processing Options** section, select the **Enable Encrypted Hand Key on Device** check box.
4. Click **Update** to save this system setting.

Users are now able to key in cardholder data directly into a supported device. Refer to the *Converge Peripheral Device Installation and Setup Guide* for more information.

To Set Up 3D Secure

To set up an e-Commerce profile for 3D Secure, follow these steps:

1. Select a profile configured as an Internet terminal from your list of available profiles.
2. Select **Terminal | Advanced | System Setup**.

The **System Setup** screen displays.

System Setup

This form is used configure the advanced system settings.

Advanced Configuration

Processing Options	
3D Secure	<input checked="" type="checkbox"/>
MasterPass	<input type="checkbox"/>
Auto Pend HTTP Transactions	<input type="checkbox"/>
Auto Settlement	<input type="checkbox"/>
Auto Settlement Time (EST)	<input type="text"/>
Settle Recurring Transactions Next Day	<input type="checkbox"/>

Update **Cancel**

3. Under the **Processing Options** section, select the **3D Secure** check box.
4. Click **Update** to save this system setting.

To Set Up MasterPass Wallet

To set up a Canadian e-Commerce profile for MasterPass wallet, follow these steps:

1. Select a profile configured as an Internet terminal from your list of available profiles.
2. Select **Terminal | Advanced | System Setup**.

The **System Setup** screen displays.

Processing Options	
3DSecure	<input type="checkbox"/>
MasterPass	<input checked="" type="checkbox"/>
Auto Pend HTTP Transactions	<input type="checkbox"/>
Auto Settlement	<input type="checkbox"/>
Auto Settlement Time (EST)	<input type="text"/>
Settle Recurring Transactions Next Day	<input type="checkbox"/>

3. Under the **Processing Options** section, select the **MasterPass** check box.
4. Click **Update** to save this system setting.

To Automatically Settle Your Transactions

1. To automatically settle your transactions, select the **Auto Settlement** check box.
2. In the **Auto Settlement Time (EST)** drop-down list, select your settlement hour.

Notes:

- Auto Settlement Time:
 - Settles all unpended transactions from the **Current Batches** queue at a specified time each day, Eastern Standard Time (EST).

- Transactions with a timestamp after the auto-settlement time will be settled in the next day's batch.
 - Can be changed after your current **Auto Settlement Time** has passed.
 - Your current batches will not settle until the newly selected time the following day.
 - When a terminal is setup for one of the following payment types: **Debit, Check, Food Stamps, Cash Benefits**, or **Check**, the terminal is forced to auto settle at 4:00 AM Eastern Standard Time (EST). However, the merchant can change the auto settlement time.
 - Once **Multi-Currency** is enabled, the terminal is forced to auto settle at 6:00 PM Eastern Standard Time (EST).
 - The merchant has no choice in the settlement time.
 - Manual settlement is not allowed.
 - Funds must be delivered at 6:00 PM EST to ensure the best exchange rates possible.
-
3. To exclude recurring transactions in the current settlement run and include them in the next day's run, select the **Settle Recurring Transactions Next Day** check box.
-

Notes:

- If the **Settle Recurring Transactions Next Day** check box is unchecked, Converge includes recurring transactions in the current settlement run.
 - When you add a new terminal, Converge sets up the terminal to include recurring transactions in the current settlement run by default (uncheck the **Settle Recurring Transactions Next Day** check box).
 - Converge allows you to set up terminals to exclude recurring transactions from the current settlement run and include them in the next day's run (check the **Settle Recurring Transactions Next Day** check box).
-

4. Click **Update** to update your settlement time.

To Configure Your Signature Capture Device Options

You can set the **Signature Capture Device Option** to your choice of devices when you have a certified device connected to your PC that will accept signatures. This function allows you to capture signature images when you enter transactions. This function also allows you to add signatures to open and settled transactions.

1. To set up a terminal for a signature capture device, select either the **Hypercom L5200** or the **Ingenico ISC250** check box.

The screenshot shows the 'System Setup' form with the 'Advanced Configuration' section expanded. The 'Signature Capture Device Options' section is visible, showing three radio button options: 'None', 'Hypercom L5200', and 'Ingenico ISC250'. The 'Ingenico ISC250' option is selected. Below this section, there is a 'Confirm' label and a text input field. At the bottom of the form are 'Update' and 'Cancel' buttons.

System Setup

This form is used to configure the advanced system settings.

Advanced Configuration

HTTP Options

Use HTTP Referrers ☐

Authorized Referrers

Add Referrer

Processing Options

Enable EMV Chip Cards ☐

Auto Settlement ☒

Auto Settlement Time (EST) 4 A.M. ▼

Settle Recurring Transactions Next Day ☐

Signature Capture Device Options

☐ None

☐ Hypercom L5200

☒ Ingenico ISC250

Confirm

Update Cancel

2. Click **Update** to accept signature images.

Notes:

- In order for the **Hypercom L5200** device to work properly you must download and install DeviceAssistant. Refer to the *Converge Peripheral Device Installation and Setup Guide* for more information on DeviceAssistant.
- In order for the **Ingenico ISC250** device to work properly you must download and install ConvergeConnect. Refer to the *Converge Peripheral Device Installation and Setup Guide* for more information on ConvergeConnect.

To Configure Your Export Options

You can set up the **Export Script** setting to specify a URL for approved, declined or error transactions. All transactions will send an export script to the specified location. Export scripts allow you to request the results of your payment transactions be returned to your Web site for inventory purposes, sales analysis, or customer database maintenance. Converge offers a post approval or export script that posts results to your system after completing each transaction.

1. Select **Terminal | Advanced | System Setup**.

The **System Setup** screen displays.

The screenshot shows the 'System Setup' web interface. At the top, it says 'System Setup' and 'This form is used to configure the advanced system settings.' Below this is a tabbed interface with 'Advanced Configuration' selected. Under this tab, there are several sections: 'Settle Re...', 'Transactions Ne...', and 'Export Options'. The 'Export Options' section is expanded and contains the following fields:

Export Options	
Enable Export Script	<input checked="" type="checkbox"/>
Approval URL	<input type="text" value="http://www.ismerchant.ca/xportscripts/VM_XportScript"/>
Declined URL	<input type="text" value="http://www.ismerchant.ca/xportscripts/VM_XportScript"/>
Error URL	<input type="text" value="http://www.ismerchant.ca/xportscripts/VM_XportScript"/>
Authentication Username	<input type="text"/>
Authentication Password	<input type="password"/>
Confirmation String	<input type="text"/>

At the bottom of the 'Export Options' section are two buttons: 'Update' and 'Cancel'.

2. Select the **Enable Export Script** check box.

The **Enable Export Script** checkbox defaults to unchecked. The remaining fields are read-only and become editable when you select the **Enable Export Script** check box.

3. Enter an **Approval URL** to indicate where your approved transactions will go.
4. Enter a **Decline URL** to indicate where your declined transaction will go.
5. Enter an **Error URL** to indicate where your errors will go.
6. Enter an **Authentication Username** and **Authentication Password**.
7. Enter a **Confirmation String**.

Notes:

- When you enter a value for authentication username, you must enter a value for authentication password, and conversely, if you enter a value for the authentication password, the authentication username is required.
- The confirmation string is optional. however, if you want to provide a confirmation string, it must be used in conjunction with the username and password.

8. Click **Update** to update your export script settings.

Note: Choosing options can be performed at one time or to individual sections and then click **Update** when completed.

Customizing Error Messages

Any user is able to click on an error message and update the message description. The error number cannot be updated. The **Custom Error Messages** screen allows you to create custom error messages when an error message is returned when a transaction could not be authorized.

If there is no custom message listed in the **Custom Message** field, the default message displays when the error is returned on the transaction that was not authorized.

If there is a value in the **Custom Message** field, this message displays on the unauthorized transaction, in place of the default message.

1. Select **Terminal | Advanced | Error Messages**.

The **Custom Error Messages** screen displays.

Custom Error Messages
All configurable error messages are displayed here.

Error Message List			
Number	Error Name	Default Message	Custom Message
3000	Gateway not responding	Error, no response.	Error, no response.
3001	Gateway generated error	#.	#.
3002	Adapter generated error	#.	#.
4000	VID Not Supplied	The VirtualMerchant ID was not supplied in the authorization request.	The VirtualMerchant ID was not supplied in the authorization request.
4001	VID, UID and PIN Invalid	The VirtualMerchant ID, User ID and/or PIN supplied in the authorization request is invalid.	The VirtualMerchant ID, User ID and/or PIN supplied in the authorization request is invalid.
4002	HTTP Trans Not Allowed	HTTP POST transactions are not allowed for this account.	HTTP POST transactions are not allowed for this account.
4003	HTTP Referrer Invalid	HTTP POST transactions are not allowed for this HTTP Referrer.	HTTP POST transactions are not allowed for this HTTP Referrer.
4005	E-mail Address Invalid	The E-mail Address supplied in the authorization request appears to be invalid.	The E-mail Address supplied in the authorization request appears to be invalid.
4006	CVV2 Not Requested With Data	The CVV2 indicator was not identified in the authorization request.	The CVV2 indicator was not identified in the authorization request.

- To customize a specific error, select the **Error Name** in the **Error Message List**.

The **Custom Error** screen displays.

Custom Error
This form is used change the default error message settings.

Custom Message	
Number	4005
Error Name	E-mail Address Invalid
Default Message	The E-mail Address supplied in the authorization request appears to be invalid.
Custom Message	The E-mail Address supplied in the authorization request appears to be invalid. Please enter a valid E-mail Address.

Update Use Default Clear Cancel

- To customize a specific error message, enter the desired message into the **Custom Message** field. The error message cannot exceed 255 characters.

Note: The text in this field does not support customized HTML code.

4. Click **Update** to save your changes.
5. When you have defined a custom message for the selected error, a **Use Default** button displays. To revert to the original message, click the **Use Default** button.

Setting Up Fraud Prevention Rules

The **Fraud Prevention Rules** screen displays a list of filters available to you. This screen allows you to manage the global and local terminal settings for the Fraud Prevention Rules in your terminal. This table gives you an overview of all rules available to you, indicating the ones that have been enabled or disabled. You must click on each rule separately to view or modify the current settings.

Fraud Prevention Rules			
The fraud prevention rules screen displays a list of filters available to you. Click on the filter you would like to configure. It is strongly recommended that you get familiar with the capabilities of each of these filters to determine which ones work best for your business needs.			
Rule	Description	Global Settings	Terminal Settings
Auto Pend Filter	This filter enables you to designate which transaction types you want to set to pend. If you are using this filter and receive approved transactions they will be automatically pending when entered through the Converge integration. Merchant must login to the application in order to release those transactions from the "Pend" state. Pending Transactions cannot be settled until they are un-pending.		Enabled
Merchant IP Address Filter	This filter enables you to designate and maintain a list of IP addresses from which you allow transactions to originate. If you are using this filter and receive transactions from an IP Address that is not on the allowed list, the transaction will be declined.		Disabled
Email Domain Filter	This filter enables you to validate the email address entered by cardholder. If you are using this filter and receive transactions from an Email address with an invalid domain, an error will be returned.		Disabled
Transaction Timeout Filter	This filter enables you to specify a time limit, between 1 and 15 minutes; for a single transaction. If the transaction exceeds the time allowed for processing, it will be declined.		Disabled

Notes:

- Merchants are asked to get familiar with the capabilities of each of these filters and monitor their processing trends to determine which ones work best for their business needs.
- Rules are only triggered through integration and do not apply to any transaction initiated from the user interface (Virtual Terminal).

The available filters are as follows:

- Auto Pend Filter
- Merchant IP Address Filter
- Mobile Payment Filter
- IP Address Filter
 - Individual/Ranges Filter
 - Country IP Address Filter
- Country Filter
 - Billing Country Filter
 - Shipping Country Filter
- IP Address & Country Mismatch Filter
 - IP Address & Billing Country Mismatch Filter
 - IP Address & Shipping Country Mismatch Filter
- Email Address Filter
- Card Number Filter
- Transaction Velocity Filter
- Email Domain Filter
- Transaction Timeout Filter

To Update Auto Pend Settings

The **Auto-Pend Filter** screen allows you to manage the **Auto Pend** settings for your terminal. These settings enable you to designate and maintain a list of the transaction types that you want to set to pend. You may choose to pend **Credit Card Sale**, **Credit Card Auth Only**, **Credit Card Force** or **Credit Card Returns**.

If you use this filter and receive approved transactions, they will be automatically pended when entered through the Converge integration. You must log on to the application to release those transactions from the **Pended** state. Pended transactions cannot be settled until they are unpended.

To Pend a Transaction Type:

1. Select **Terminal | Advanced | Fraud Protection Rules**.

The **Fraud Protection Rules** screen displays.

2. Click **Auto Pend Filter**.

The **Auto Pend Filter** screen displays.

Auto Pend Filter

This filter enables you to designate which transaction types you want to set to pend. You may choose to pend Credit Card Sale, Credit Card Auth Only, Credit Card Force or Credit Card Returns. If you are using this filter and receive approved transactions they will be automatically pended when entered through the Converge integration. Merchant must login to the application in order to release those transactions from the "Pend" state. Pended Transactions cannot be settled until they are un-pended.

IMPORTANT NOTES:
By enabling the filter check box and selecting the update button, you are activating the filter settings for your terminal immediately. The filter will be applied to those transactions you have specified. You may modify, enable, or disable this filter at any time.

Auto Pend Transactions Settings

☐ Enable Auto Pend Settings

Please select the transactions you want to Auto Pend

☐ Credit Card Sale
☐ Credit Card Auth Only
☐ Credit Card Force
☐ Credit Card Return

Update Cancel

3. Select the transaction types that you want to auto pend.

Note: Must select transaction *before* selecting the **Enable Auto Pend Settings** checkbox.

4. Select the **Enable Auto Pend Settings** check box.

A message displays to confirm activation.

Message from webpage

?

You are activating the filter setting for your terminal immediately.
The filter will be applied to those transactions that you have specified. Do you want to proceed?

OK Cancel

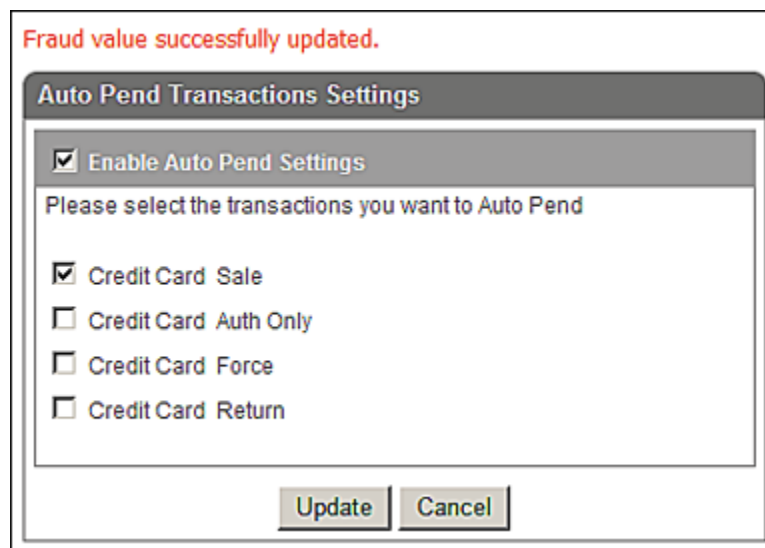
5. Click **OK**.

Notes:

- To disable activation, uncheck the **Enable Auto Pend Settings** check box. A message displays to confirm deactivation.
 - You must choose at least one transaction type to enable this filter.
 - The filter applies to all transactions entered through the integration.
-

6. Click **Update**.

A message displays that the fraud value successfully updated.



The settings for your terminal are immediately activated and the filter will be applied to all transaction types specified.

To Update Merchant IP Address Settings

The **Merchant IP Address Filter** screen allows you to manage the merchant IP address settings for your terminal. These settings enable you to designate and maintain a list of IP addresses from which you allow transactions to originate. If you use this filter and receive transactions from an IP address that is not in your allowed list, the transactions will be declined.

The **Merchant IP Address Filter** settings only have a local setting; there is no global setting for this rule. You only have one checkbox that is used to enable/disable the rule for the terminal.

Merchant IP Address Filter

This filter enables you to designate and maintain a list of IP addresses from which you allow transactions to originate.

If you are using this filter and receive transactions from an IP Address that is not in your allowed list, the transactions will be declined.

IMPORTANT NOTE:
By enabling the filter check box and selecting the update button, you are activating the filter settings for your terminal immediately. The filter will be applied to all transactions received. You may modify, enable, or disable this filter at any time.

Merchant IP Address Settings

☒ **Enable IP Address Settings**

Please add an individual (all 4 octets Ex. XXX.XXX.XXX.XXX) or a range (first 2 or 3 octets Ex. XXX.XXX.XXX or XXX.XXX) of IP addresses from which transaction requests can originate. You must add at least one IP Address to enable this filter.

Display:

2 items

1	XXX.XXX.XXX.XXX	<input type="button" value="Remove"/>
2	XXX.XXX.XXX	<input type="button" value="Remove"/>

To Add a Merchant IP Address

1. Select **Terminal | Advanced | Fraud Protection Rules**.

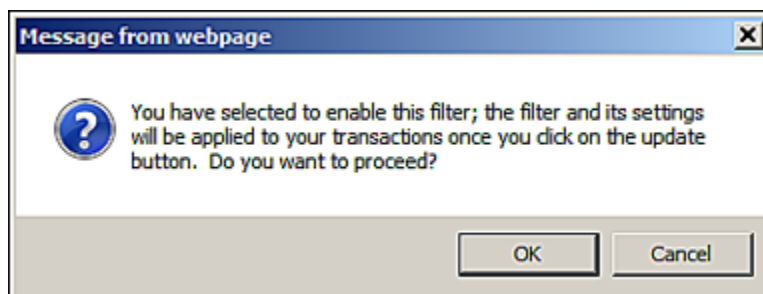
The **Fraud Protection Rules** screen displays.

2. Click **Merchant IP Address Filter**.

The **Merchant IP Address Filter** screen displays.

3. Select the **Enable IP Address Settings** check box.

A message displays to confirm activation.



- Click **OK**.

Note: To disable activation, uncheck the **Enable IP Address Settings** check box. A message displays to confirm deactivation.

- In the text box provided, enter an individual or a range of IP addresses from which transaction requests can originate.
- Click **Add**.

The newly added IP address displays.

Merchant IP Address Settings

☒ **Enable IP Address Settings**

Please add an individual (all 4 octets Ex. XXX.XXX.XXX.XXX) or a range (first 2 or 3 octets Ex. XXX.XXX.XXX or XXX.XXX) of IP addresses from which transaction requests can originate. You must add at least one IP Address to enable this filter.

Add

Display: **25**

3 items		
1	XXX.XXX.XXX.XXX	Remove
2	XXX.XXX.XXX	Remove
3	XXX.XXX.XXX.XXX	Remove

Update **Cancel**

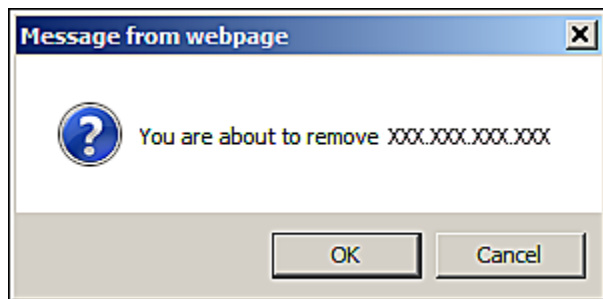
- To add another IP address, repeat steps 5 to 6.
- Click **Update**.

The settings for your terminal are immediately activated and the filter will be applied to all transactions received. You must add at least one IP address to enable this filter.

To Remove a Merchant IP Address

1. Click **Remove** next to the IP address you wish to remove.

A message displays to confirm removal.

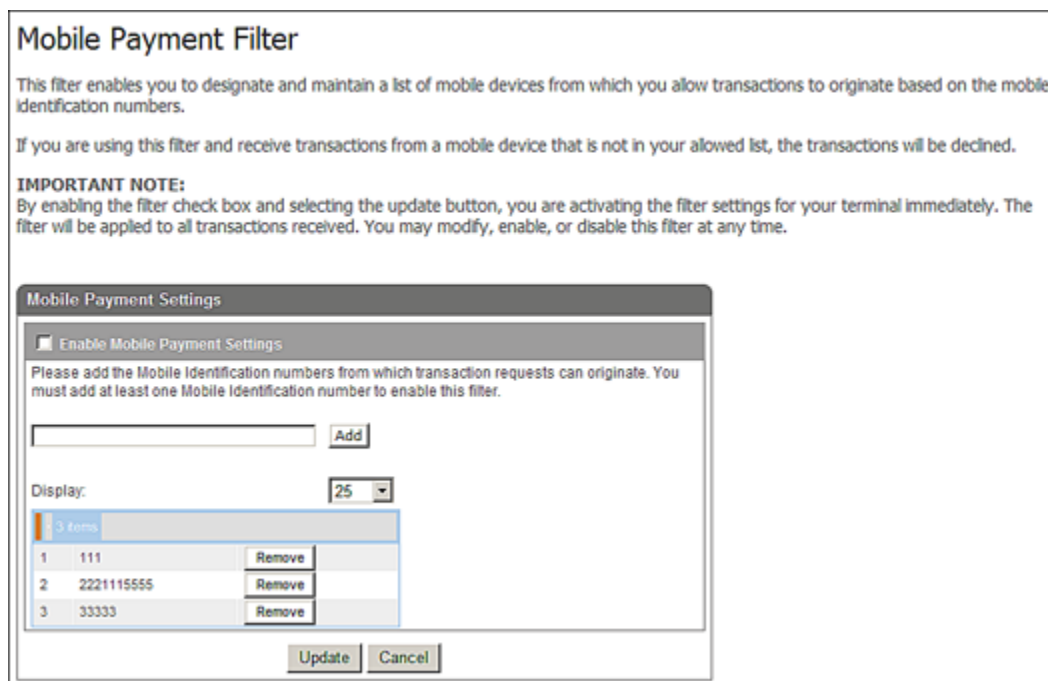


2. Click **OK**.
3. Click **Update**.

The settings for your terminal are immediately activated and the filter will be applied to all transactions received.

To Update Mobile Payment Settings

The **Mobile Payment Filter** screen lets you designate and maintain a list of mobile devices from which you allow transactions to originate based on the mobile identification numbers. If you are using this filter and receive transactions from a mobile device that is not in your allowed list, the transactions will be declined.



Mobile Payment Filter

This filter enables you to designate and maintain a list of mobile devices from which you allow transactions to originate based on the mobile identification numbers.

If you are using this filter and receive transactions from a mobile device that is not in your allowed list, the transactions will be declined.

IMPORTANT NOTE:
By enabling the filter check box and selecting the update button, you are activating the filter settings for your terminal immediately. The filter will be applied to all transactions received. You may modify, enable, or disable this filter at any time.

Mobile Payment Settings

☒ Enable Mobile Payment Settings

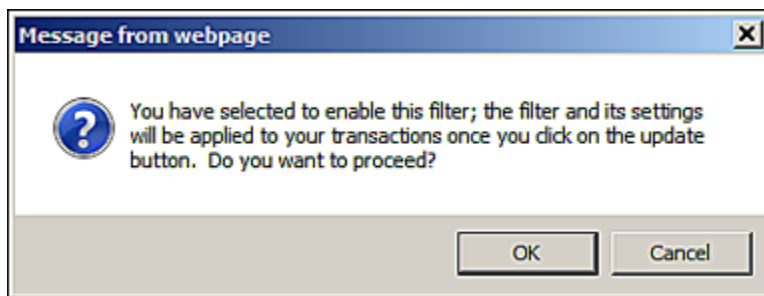
Please add the Mobile Identification numbers from which transaction requests can originate. You must add at least one Mobile Identification number to enable this filter.

Display:

	Mobile Identification Number	Action
1	111	<input type="button" value="Remove"/>
2	2221115555	<input type="button" value="Remove"/>
3	33333	<input type="button" value="Remove"/>

To add a mobile payment identification number:

1. Select **Terminal | Advanced | Fraud Protection Rules**.
The **Fraud Protection Rules** screen displays.
2. Click **Mobile Payment Filter**.
The **Mobile Payment Filter** screen displays.
3. Enter the mobile payment number that you want add.
4. Click the **Add** button.
5. Select the **Enable Enable Mobile Payment Settings** check box.
A message displays to confirm activation.



6. Click **OK**.

Note: To disable activation, uncheck the **Enable Enable Mobile Payment Settings** check box. A message displays to confirm deactivation.

7. Click **Update**.

The settings for your terminal are immediately activated and the filter will be applied to all transactions received.

To Update IP Address Settings

The **IP Address Filter** screen enables you to designate and maintain a list of IP addresses of cardholders from which you do not allow transactions to originate. You may enable the Converge global IP address settings or add your own list of IP address settings based on a single IP address or a country IP address to block.

If you use this filter and receive transactions from an IP Address that is in your blocked list or an IP address is not provided, the transactions will be declined.

To block a specific IP address or range of IP addresses, you enter the IP address and click the **Add** button. You can enter IP addresses without enabling the local IP address setting of the rule for the terminal. However, you cannot enable the local IP address setting until at least one IP address is entered; an error message will be displayed when you click the **Update** button.

To block all IP addresses for a country, select a country from the **Country to Accept** box on the left and click the right pointing arrow to move the country to the **Countries to Block** box on the right. You can select countries without enabling the local country setting of the rule for the terminal. However, you cannot enable the local country setting until at least one country is in the **Countries to Block** box; an error message will be displayed when the user clicks the **Update** button.

You can remove IP addresses/countries without disabling the local setting of the rule; however if you remove all entries and click the **Update** button you will get an error message. When removing all entries, you have to uncheck the local setting checkbox before clicking the **Update** button.

At the local level, you can enable/disable the IP address and countries settings individually. Both can be disabled, both can be enabled, or one or the other can be enabled and the other disabled. Converge will only execute the global setting and local settings of this rule for the terminal when the settings are enabled.

At a global level, you can enable/disable the entire rule for the terminal. This includes both the individual/range of IP address and countries. The global setting of this rule always includes the individual IP addresses and the countries.

IP Address Filter

This filter enables you to designate and maintain a list of IP addresses of cardholders from which you do not allow transactions to originate. You may enable the Converge Global IP Address Settings or add your own list of IP Address Settings based on a single IP Address or a Country IP Address to block.

If you are using this filter and receive transactions from an IP Address that is in your blocked list or an IP Address is not provided, the transactions will be declined.

IMPORTANT NOTES:
In order to use this filter you must submit the cardholder IP Address (ssl_cardholder_ip) via process.do and processxml.do with each transaction.

By enabling the filter check box and selecting the Update button, you are activating the filter settings for your terminal immediately. The filter will be applied to all transactions received. You may modify, enable, or disable this filter at any time.

IP Address Filter Settings

☐ Enable Global Settings

The Global IP Address Filter is predetermined list of individual and country IP addresses known for fraudulent activities. There is no merchant-controlled configuration for this filter; management of this filter is handled exclusively by Elavon.

☐ Enable IP Address Settings

Please add an individual (all 4 octets Ex. XXX.XXX.XXX.XXX) or a range (first 2 or 3 octets Ex. XXX.XXX.XXX or XXX.XXX) or Country IP addresses from which transaction requests are not allowed. You must add at least one IP Address or one Country IP Address to enable those filters.

Display:

3 items	
1	XXX.XXX.XXX.XXX <input type="button" value="Remove"/>
2	XXX.XXX.XXX.XXX <input type="button" value="Remove"/>
3	XXX.XXX.XXX.XXX <input type="button" value="Remove"/>

☐ Enable Country IP Address Settings

Countries to Accept

- Afghanistan (AFG)
- Albania (ALB)
- Algeria (DZA)
- American Samoa (ASM)
- Andorra (AND)
- Angola (AGO)
- Anguilla (AIA)
- Antarctica (ATA)
- Antigua and Barbuda (ATG)
- Argentina (ARG)
- Armenia (ARM)
- Aruba (ABW)
- Australia (AUS)
- Austria (AUT)
- Azerbaijan (AZE)

Countries to Block

- United States (USA)

>>

<<

To Update the Global IP Address Settings

1. Select **Terminal | Advanced | Fraud Protection Rules**.

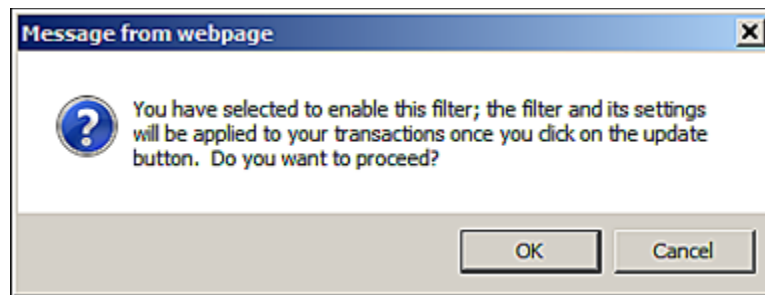
The **Fraud Protection Rules** screen displays.

2. Click **IP Address Filter**.

The **IP Address Filter** screen displays.

3. Select the **Enable Global Settings** check box, if desired.

A message displays to confirm activation.



4. Click **OK**.

Note: To disable activation, uncheck the **Enable Global Settings** check box. A message displays to confirm deactivation.

5. Click **Update**.

The settings for your terminal are immediately activated and the filter will be applied to all transactions received.

To Add an IP Address

1. Select **Terminal | Advanced | Fraud Protection Rules**.

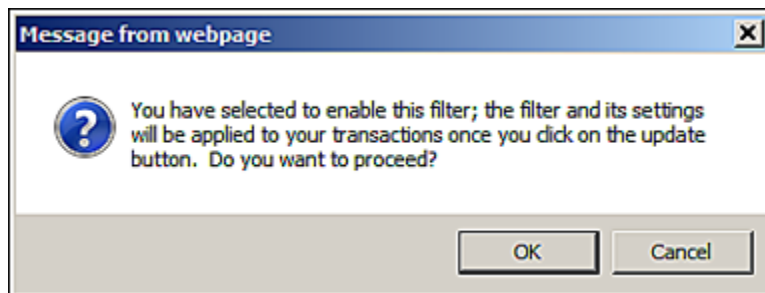
The **Fraud Protection Rules** screen displays.

2. Click **IP Address Filter**.

The **IP Address Filter** screen displays.

3. Select the **Enable IP Address Settings** check box, if desired.

A message displays to confirm activation.



4. Click **OK**.

Note: To disable activation, uncheck the **Enable IP Address Settings** check box. A message displays to confirm deactivation.

5. In the text box provided, enter an individual IP address, or a country IP address, or a range of IP addresses, from which transaction requests are not allowed.
6. Click **Add**.

The newly added IP address displays.

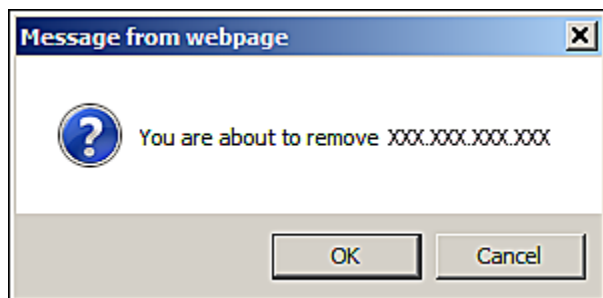
7. To add another IP address, repeat steps 7 to 8.
8. Click **Update**.

The filter settings for your terminal are immediately activated and the filter will be applied to all transactions received.

To Remove an IP Address

1. Click **Remove** next to the IP address you wish to remove.

A message displays to confirm removal.



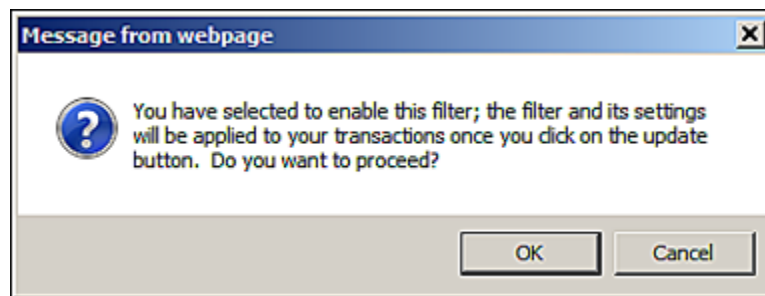
2. Click **OK**.
3. Click **Update**.



The filter settings for your terminal are immediately activated and the filter will be applied to all transactions received.

To Update the Country IP Address Settings

1. Select **Terminal | Advanced | Fraud Protection Rules**.
The **Fraud Protection Rules** screen displays.
2. Click **IP Address Filter**.
The **IP Address Filter** screen displays.
3. Select the **Enable Country IP Address Settings** check box, if desired.

A message displays to confirm activation.



4. Click **OK**.
5. Under **Countries to Accept**, click the name of the country or countries you wish to block and then click the  arrows.
The selected country name moves over to the **Countries to Block** section. To reverse the action, click the name of the country and then click the  arrows.
6. Click **Update**.

The filter settings for your terminal are immediately activated and the filter will be applied to all transactions received.

To Update Billing Country Settings

The **Billing Country Filter** screen enables you to designate and maintain a list of billing countries from which you do not allow transactions to originate.

The **Billing Country Filter** has a global setting and a local setting. The first checkbox enables/disables the global setting of the rule for the terminal. The second check box enables/disables the local setting of the rule for the terminal.

To block a country for the terminal, select a country from the box on the left and click the right pointing arrow to move the country to the box on the right. You can select countries without enabling the local setting for the terminal. However, you cannot enable the local setting until at least one country is in the **Countries to Block** box. An error message displays when you click the **Update** button.

To Update the Global Billing Country Settings

1. Select **Terminal | Advanced | Fraud Protection Rules**.

The **Fraud Protection Rules** screen displays.

2. Click **Billing Country Filter**.

The **Billing Country Filter** screen displays.

Billing Country Filter

This filter enables you to designate and maintain a list of billing countries from which you do not allow transactions to originate. You may enable the Converge Global Billing Country Settings or add your own list of billing countries to block.

If you are using this filter and receive transactions from a billing country that is in your blocked list or a billing country was not provided, the transactions will be declined.

IMPORTANT NOTES:
In order to use this filter you must submit the billing country via process.do or processxml.do with each transaction, thus you must edit your payment form settings to set the billing country field (ssl_country) as required.

By enabling the filter check box and selecting the Update button, you are activating the filter settings for your terminal immediately. The filter will be applied to all transactions received. You may modify, enable, or disable this filter at any time.

Billing Country Filter Settings

☒ **Enable Global Settings**

The Converge Billing Country Filter is predetermined list of billing countries known for fraudulent activities. There is no merchant-controlled configuration for this filter; management of this filter is handled exclusively by Elavon.

☐ **Enable Billing Country Settings**

Please add a billing country or countries from which transaction requests are not allowed. You must add at least one billing country to enable this filter.

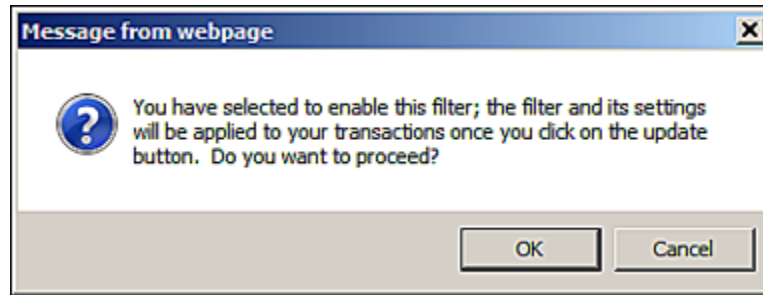
Countries to Accept

- Afghanistan (AFG)
- Albania (ALB)
- Algeria (DZA)
- American Samoa (ASM)
- Andorra (AND)
- Angola (AGO)
- Anguilla (AIA)
- Antarctica (ATA)
- Antigua and Barbuda (ATG)
- Argentina (ARG)
- Armenia (ARM)
- Aruba (ABW)
- Australia (AUS)
- Austria (AUT)
- Azerbaijan (AZE)

Countries to Block

3. Select the **Enable Global Settings** check box, if desired.

A message displays to confirm activation.



4. Click **OK**.

Note: To disable activation, uncheck the **Enable Global Settings** check box. A message displays to confirm deactivation.

5. Click **Update**.

The filter settings for your terminal are immediately activated and the filter will be applied to all transactions received.

To Update the Billing Country Settings

1. Select **Terminal | Advanced | Fraud Protection Rules**.

The **Fraud Protection Rules** screen displays.

2. Click **Billing Country Filter**.

The **Billing Country Filter** screen displays.

Billing Country Filter

This filter enables you to designate and maintain a list of billing countries from which you do not allow transactions to originate. You may enable the Converge Global Billing Country Settings or add your own list of billing countries to block.

If you are using this filter and receive transactions from a billing country that is in your blocked list or a billing country was not provided, the transactions will be declined.

IMPORTANT NOTES:
In order to use this filter you must submit the billing country via process.do or processxml.do with each transaction, thus you must edit your payment form settings to set the billing country field (ssl_country) as required.

By enabling the filter check box and selecting the Update button, you are activating the filter settings for your terminal immediately. The filter will be applied to all transactions received. You may modify, enable, or disable this filter at any time.

Billing Country Filter Settings

☐ Enable Global Settings

The Converge Billing Country Filter is predetermined list of billing countries known for fraudulent activities. There is no merchant-controlled configuration for this filter; management of this filter is handled exclusively by Elavon.

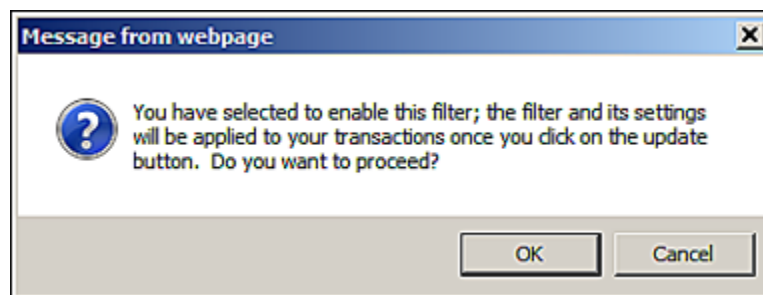
☐ Enable Billing Country Settings

Please add a billing country or countries from which transaction requests are not allowed. You must add at least one billing country to enable this filter.

Countries to Accept	Countries to Block
Afghanistan (AFG)	
Albania (ALB)	
Algeria (DZA)	
American Samoa (ASM)	
Andorra (AND)	
Angola (AGO)	
Anguilla (AIA)	
Antarctica (ATA)	
Antigua and Barbuda (ATG)	
Argentina (ARG)	
Armenia (ARM)	
Aruba (ABW)	
Australia (AUS)	
Austria (AUT)	
Azerbaijan (AZE)	


3. Select the **Enable Billing Country Settings** check box, if desired.


A message displays to confirm activation.



4. Click **OK**.

Note: To disable activation, uncheck the **Enable Billing Country Settings** check box. A message displays to confirm deactivation.

5. Under **Countries to Accept**, click the name of the country or countries you wish to block and then click the  arrow.

The selected country name moves over to the **Countries to Block** section. To reverse the action, click the name of the country and then click the  arrow.

6. Click **Update**.

The filter settings for your terminal are immediately activated and the filter will be applied to all transactions received.

To Update Shipping Country Settings

The **Shipping Country Filter** screen enables you to designate and maintain a list of shipping countries from which you do not allow a transaction to be shipped to.

To Update the Global Shipping Country Settings

1. Select **Terminal | Advanced | Fraud Protection Rules**.

The **Fraud Protection Rules** screen displays.

2. Click **Shipping Country Filter**.

The **Shipping Country Filter** screen displays.

Shipping Country Filter

This filter enables you to designate and maintain a list of shipping countries from which you do not allow a transaction to be shipped to. You may enable the Converge Global Shipping Country Settings or add your own list of shipping countries to block.

If you are using this filter and receive transactions where the shipping country is in your blocked list or a shipping country was not provided, the transactions will be declined.

IMPORTANT NOTES:
In order to use this filter you must submit the shipping country via process.do or processxml.do with each transaction, thus you must edit your payment form settings to set the shipping country field (ssl_ship_to_country) as required.

By enabling the filter check box and selecting the Update button, you are activating the filter settings for your terminal immediately. The filter will be applied to all transactions received. You may modify, enable, or disable this filter at any time.

Shipping Country Filter Settings

☐ **Enable Global Settings**

The Global Shipping Country Filter is predetermined list of shipping countries known for fraudulent activities. There is no merchant-controlled configuration for this filter; management of this filter is handled exclusively by Elavon.

☐ **Enable Shipping Country Settings**

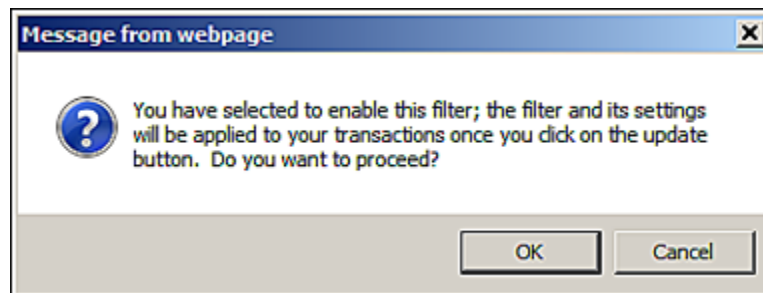
Please add a shipping country or countries from which transaction requests are not allowed. You must add at least shipping country to enable this filter.

Countries to Accept	Countries to Block
Afghanistan (AFG) Albania (ALB) Algeria (DZA) American Samoa (ASM) Andorra (AND) Angola (AGO) Anguilla (AIA) Antarctica (ATA) Antigua and Barbuda (ATG) Argentina (ARG) Armenia (ARM) Aruba (ABW) Australia (AUS) Austria (AUT) Azerbaijan (AZE)	United States (USA)

Update Cancel

3. Select the **Enable Global Settings** check box, if desired.

A message displays to confirm activation.



4. Click **OK**.

Note: To disable activation, uncheck the **Enable Global Settings** check box. A message displays to confirm deactivation.

- Click **Update**.

The filter settings for your terminal are immediately activated and the filter will be applied to all transactions received.

To Update the Shipping Country Settings

- Select **Terminal | Advanced | Fraud Protection Rules**.

The **Fraud Protection Rules** screen displays.

- Click **Shipping Country Filter**.

The **Shipping Country Filter** screen displays.

Shipping Country Filter

This filter enables you to designate and maintain a list of shipping countries from which you do not allow a transaction to be shipped to. You may enable the Converge Global Shipping Country Settings or add your own list of shipping countries to block.

If you are using this filter and receive transactions where the shipping country is in your blocked list or a shipping country was not provided, the transactions will be declined

IMPORTANT NOTES:
In order to use this filter you must submit the shipping country via process.do or processxml.do with each transaction, thus you must edit your payment form settings to set the shipping country field (ssl_ship_to_country) as required.

By enabling the filter check box and selecting the Update button, you are activating the filter settings for your terminal immediately. The filter will be applied to all transactions received. You may modify, enable, or disable this filter at any time.

Shipping Country Filter Settings

☐ **Enable Global Settings**

The Global Shipping Country Filter is predetermined list of shipping countries known for fraudulent activities. There is no merchant-controlled configuration for this filter; management of this filter is handled exclusively by Elavon.

☐ **Enable Shipping Country Settings**

Please add a shipping country or countries from which transaction requests are not allowed. You must add at least shipping country to enable this filter.

Countries to Accept

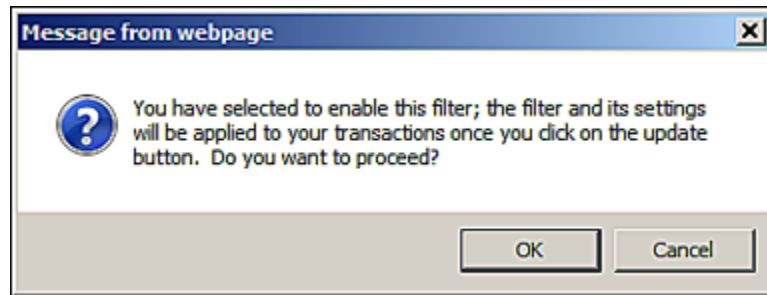
- Afghanistan (AFG)
- Albania (ALB)
- Algeria (DZA)
- American Samoa (ASM)
- Andorra (AND)
- Angola (AGO)
- Anguilla (AIA)
- Antarctica (ATA)
- Antigua and Barbuda (ATG)
- Argentina (ARG)
- Armenia (ARM)
- Aruba (ABW)
- Australia (AUS)
- Austria (AUT)
- Azerbaijan (AZE)

Countries to Block

- United States (USA)


- Select the **Enable Shipping Country Settings** check box, if desired.


A message displays to confirm activation.



4. Click **OK**.

Note: To disable activation, uncheck the **Enable Shipping Country Settings** check box.
A message displays to confirm deactivation.

5. Under **Countries to Accept**, click the name of the country or countries you wish to block and then click the  arrow.

The selected country name moves over to the **Countries to Block** section. To reverse the action, click the name of the country and then click the  arrow.

6. Click **Update**.

The filter settings for your terminal are immediately activated and the filter will be applied to all transactions received.

To Update IP Address & Billing Country Mismatch Settings

The **IP Address & Billing Country Mismatch Filter** screen allows you to manage the IP and billing country mismatch settings for your terminal. These settings enable you to designate and maintain a list of billing countries and compare the transaction's originating IP address with the billing country provided. This helps to determine whether or not the transaction is placed in the country in which it originated. You may enable the **Global IP Address & Billing Country Mismatch Settings** or add your own list of **IP Address & Billing Country Mismatch Settings**.

If you use this filter and receive transactions where the billing country does not match the IP address for those countries you have specified in the list, or a billing country and IP address were not provided, the transactions will be declined.

To block a country for the terminal, select a country from the box on the left and click the right pointing arrow to move the country to the box on the right. you can select countries without enabling the local setting for the terminal. however, users cannot enable the local setting until at least one country is in the **Countries to Block** box; an error message will be displayed when the user clicks the **Update** button.

Note: To use this filter you must submit the IP address along with the billing country with each transaction. Thus, you must edit your payment form settings to set the **Billing Country** field (`ssl_country`) as required in the payment fields screen under the **Terminal | Merchant Payment Fields** menu option.

To Update the Global IP Address & Billing Country Mismatch Settings

1. Select **Terminal | Advanced | Fraud Protection Rules**.

The **Fraud Protection Rules** screen displays.

2. Click **IP Address & Billing Country Mismatch Filter**.

The **IP Address & Billing Country Mismatch Filter** screen displays.

The screenshot shows the 'IP Address & Billing Country Mismatch Filter' settings interface. It includes a title bar, a description of the filter's purpose, and important notes. Below the text, there are two main sections: 'Enable Global Settings' and 'Enable IP & Billing Country Mismatch'. The 'Enable IP & Billing Country Mismatch' section contains a 'Country List' on the left and a 'Countries to Verify' list on the right, with arrows for moving countries between them. At the bottom are 'Update' and 'Cancel' buttons.

IP Address & Billing Country Mismatch Filter

This filter enables you to designate and maintain a list of billing countries and compares the transaction's originating IP Address with the billing country provided. This helps determine whether or not the transaction is placed in the country in which it originated. You may enable the Converge Global IP & Billing Country Settings or add your own list of IP & Billing Country Mismatch Settings.

If you are using this filter and receive transactions where the billing country doesn't match the IP Address for those countries you have specified in the list, or a billing country and IP Address were not provided, the transactions will be declined.

IMPORTANT NOTES:
In order to use this filter you must submit the billing country and the cardholder IP Address (`ssl_cardholder_ip`) via `process.do` or `processxml.do` with each transaction, thus you must edit your payment form settings to set the billing country field (`ssl_country`) as required.

IP Address & Billing Country Mismatch Filter Settings

☒ **Enable Global Settings**

The Global IP & Billing Address Mismatch Filter is predetermined list of billing countries known for fraudulent activities. There is no merchant-controlled configuration for this filter; management of this filter is handled exclusively by Elavon.

☒ **Enable IP & Billing Country Mismatch**

Please add a billing country or countries; we will verify if the country entered matches the transaction IP Address. You must add at least one billing country to enable this filter.

Country List

- Afghanistan (AFG)
- Albania (ALB)
- Algeria (DZA)
- American Samoa (ASM)
- Andorra (AND)
- Angola (AGO)
- Anguilla (AIA)
- Antarctica (ATA)
- Antigua and Barbuda (ATG)
- Argentina (ARG)
- Armenia (ARM)
- Aruba (ABW)
- Australia (AUS)
- Austria (AUT)
- Azerbaijan (AZE)

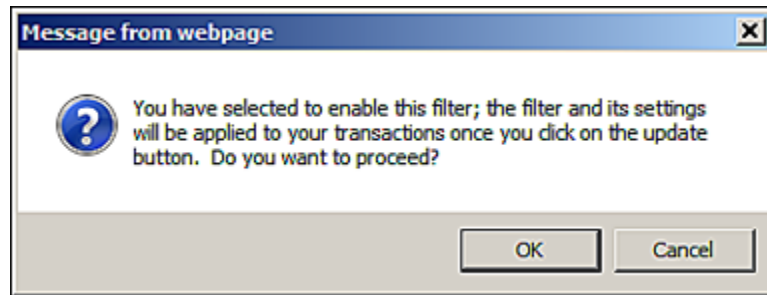
Countries to Verify

>> > < <<

Update Cancel

3. Select the **Enable Global Settings** check box, if desired.

A message displays to confirm activation.



4. Click **OK**.

Note: To disable activation, uncheck the **Enable Global Settings** check box. A message displays to confirm deactivation.

5. Click **Update**.

The filter settings for your terminal are immediately activated and the filter will be applied to all transactions received.

To Update IP Address & Billing Country Mismatch Settings

1. Select **Terminal | Advanced | Fraud Protection Rules**.
The **Fraud Protection Rules** screen displays.
2. Click **IP Address & Billing Country Mismatch Filter**.

The **IP Address & Billing Country Mismatch Filter** screen displays.

IP Address & Billing Country Mismatch Filter

This filter enables you to designate and maintain a list of billing countries and compares the transaction's originating IP Address with the billing country provided. This helps determine whether or not the transaction is placed in the country in which it originated. You may enable the Converge Global IP & Billing Country Settings or add your own list of IP & Billing Country Mismatch Settings.

If you are using this filter and receive transactions where the billing country doesn't match the IP Address for those countries you have specified in the list, or a billing country and IP Address were not provided, the transactions will be declined.

IMPORTANT NOTES:
In order to use this filter you must submit the billing country and the cardholder IP Address (ssl_cardholder_ip) via process.do or processxml.do with each transaction, thus you must edit your payment form settings to set the billing country field (ssl_country) as required.

IP Address & Billing Country Mismatch Filter Settings

☐ **Enable Global Settings**

The Global IP & Billing Address Mismatch Filter is predetermined list of billing countries known for fraudulent activities. There is no merchant-controlled configuration for this filter; management of this filter is handled exclusively by Elavon.

☐ **Enable IP & Billing Country Mismatch**

Please add a billing country or countries; we will verify if the country entered matches the transaction IP Address. You must add at least one billing country to enable this filter.


Country List	Countries to Verify
Afghanistan (AFG)	
Albania (ALB)	
Algeria (DZA)	
American Samoa (ASM)	
Andorra (AND)	
Angola (AGO)	
Anguilla (AIA)	
Antarctica (ATA)	
Antigua and Barbuda (ATG)	
Argentina (ARG)	
Armenia (ARM)	
Aruba (ABW)	
Australia (AUS)	
Austria (AUT)	
Azerbaijan (AZE)	

Update Cancel

3. Select the **Enable IP & Billing Country Mismatch** check box, if desired.

A message displays to confirm activation.


Message from webpage


 You have selected to enable this filter; the filter and its settings will be applied to your transactions once you click on the update button. Do you want to proceed?



OK Cancel

4. Click **OK**.

Note: To disable activation, uncheck the **Enable IP & Billing Country Mismatch** check box. A message displays to confirm deactivation.

5. Under **Country List**, click the name of the country or countries you wish to validate if the IP address matches and then the  arrow.

The selected country name moves over to the **Countries to Verify** section. To reverse the action, click the name of the country and then the  arrow.

If you click  all countries in the list move over to the **Countries to Verify** section. To reverse the action, click the name of the country and then .

6. Click **Update**.

The filter settings for your terminal are immediately activated and the filter will be applied to all transactions received.

To Update IP Address & Shipping Country Mismatch Settings

The **IP & Shipping Country Mismatch Filter** screen allows you to manage the IP and shipping country mismatch settings for your terminal. These settings enable you to designate and maintain a list of shipping countries and compare the transaction's originating IP address with the shipping country provided. This helps to determine whether or not the transaction is placed in the country in which the order will be shipped to. You may enable the **Global IP & Shipping Country Mismatch Settings** or add your own list of **IP & Shipping Country Mismatch Settings**.

If you use this filter and receive transactions where the shipping country does not match the IP address for those countries you have specified in the list, or a shipping country and IP address were not provided, the transactions will be declined.

To use this filter, an IP address value must be submitted with each transaction along with the shipping country ISO code. You must edit your payment form settings to set the **Shipping Country** field (`ssl_ship_to_country`) as required in the payment fields screen under the **Terminal | Merchant | Payment Fields** menu option.

To Update the Global IP & Shipping Country Mismatch Settings

1. Select **Terminal | Advanced | Fraud Protection Rules**.

The **Fraud Protection Rules** screen displays.

2. Click **IP Address & Shipping Country Mismatch Filter**.

The **IP Address & Shipping Country Mismatch Filter** screen displays.

IP Address & Shipping Country Mismatch Filter

This filter enables you to designate and maintain a list of shipping countries and compares the transaction's originating IP Address with the shipping country provided. This helps determine whether or not the transaction is placed in the country in which the order will be shipped to. You may enable the Converge Global IP & Shipping Country Settings or add your own list of IP & Shipping Country Mismatch Settings.

If you are using this filter and receive transactions where the shipping country doesn't match the IP Address for those countries you have specified in the list or a shipping country and IP Address were not provided, the transactions will be declined.

IMPORTANT NOTES:
In order to use this filter you must submit the shipping country and the cardholder IP Address (ssl_cardholder_ip) via process.do or processxml.do with each transaction, thus you must edit your payment form settings to set the shipping country field (ssl_ship_to_country) as required.

By enabling the filter check box and selecting the Update button, you are activating the filter settings for your terminal immediately. The filter will be applied to all transactions received. You may modify, enable, or disable this filter at any time.

IP Address & Shipping Country Mismatch Filter Settings

☒ **Enable Global Settings**

The Global IP & Shipping Country Mismatch Filter is predetermined list of shipping countries known for fraudulent activities. There is no merchant-controlled configuration for this filter; management of this filter is handled exclusively by Elavon.

☐ **Enable IP & Shipping Country Mismatch**


Please add a shipping country or countries; we will verify if the country entered matches the transaction IP Address. You must add at least one shipping country to enable this filter.

Country List		Countries to Verify
Afghanistan (AFG)		
Albania (ALB)		
Algeria (DZA)		
American Samoa (ASM)		
Andorra (AND)		
Angola (AGO)		
Anguilla (AIA)		
Antarctica (ATA)		
Antigua and Barbuda (ATG)		
Argentina (ARG)		
Armenia (ARM)		
Aruba (ABW)		
Australia (AUS)		
Austria (AUT)		
Azerbaijan (AZE)		

3. Select the **Enable Global Settings** check box, if desired.

A message displays to confirm activation.

Message from webpage

 You have selected to enable this filter; the filter and its settings will be applied to your transactions once you click on the update button. Do you want to proceed?

4. Click **OK**.

Note: To disable activation, uncheck the **Enable Global Settings** check box. A message displays to confirm deactivation.

5. Click **Update**.

The filter settings for your terminal are immediately activated and the filter will be applied to all transactions received.

To Update the IP & Shipping Country Mismatch Settings

1. Select **Terminal | Advanced | Fraud Protection Rules**.

The **Fraud Protection Rules** screen displays.

2. Click **IP Address & Shipping Country Mismatch Filter**.

The **IP Address & Shipping Country Mismatch Filter** screen displays.

IP Address & Shipping Country Mismatch Filter

This filter enables you to designate and maintain a list of shipping countries and compares the transaction's originating IP Address with the shipping country provided. This helps determine whether or not the transaction is placed in the country in which the order will be shipped to. You may enable the Converge Global IP & Shipping Country Settings or add your own list of IP & Shipping Country Mismatch Settings.

If you are using this filter and receive transactions where the shipping country doesn't match the IP Address for those countries you have specified in the list or a shipping country and IP Address were not provided, the transactions will be declined.

IMPORTANT NOTES:
In order to use this filter you must submit the shipping country and the cardholder IP Address (ssl_cardholder_ip) via process.do or processxml.do with each transaction, thus you must edit your payment form settings to set the shipping country field (ssl_ship_to_country) as required.

By enabling the filter check box and selecting the Update button, you are activating the filter settings for your terminal immediately. The filter will be applied to all transactions received. You may modify, enable, or disable this filter at any time.

IP Address & Shipping Country Mismatch Filter Settings

☒ **Enable Global Settings**
 The Global IP & Shipping Country Mismatch Filter is predetermined list of shipping countries known for fraudulent activities. There is no merchant-controlled configuration for this filter; management of this filter is handled exclusively by Elavon.

☐ **Enable IP & Shipping Country Mismatch**
 Please add a shipping country or countries; we will verify if the country entered matches the transaction IP Address. You must add at least one shipping country to enable this filter.

Country List		Countries to Verify
Afghanistan (AFG)		
Albania (ALB)		
Algeria (DZA)		
American Samoa (ASM)		
Andorra (AND)		
Angola (AGO)		
Anguilla (AIA)		
Antarctica (ATA)		
Antigua and Barbuda (ATG)		
Argentina (ARG)		
Armenia (ARM)		
Aruba (ABW)		
Australia (AUS)		
Austria (AUT)		
Azerbaijan (AZE)		

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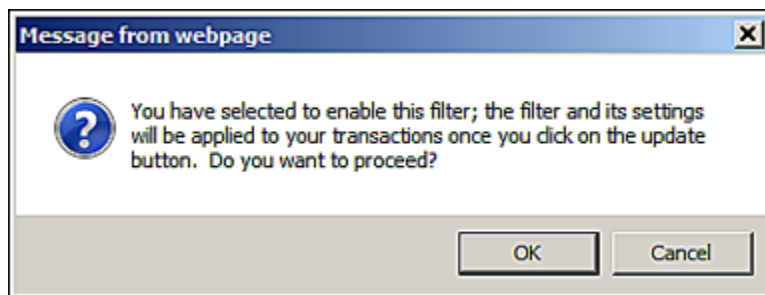
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3. Select the **Enable IP Shipping Country Mismatch** check box, if desired.


A message displays to confirm activation.





4. Click **OK**.

Note: To disable activation, uncheck the **Enable IP Shipping Country Mismatch** check box. A message displays to confirm deactivation.

5. Under **Country List**, click the name of the country or countries you wish to validate if the IP address matches and then click the  arrow.

The selected country name moves over to the **Countries to Verify** section. To reverse the action, click the name of the country and then click the  arrow.

If you click the  arrows, all countries in the list move over to the **Countries to Verify** section. To reverse the action, click the  arrows.

6. Click **Update**.

The filter settings for your terminal are immediately activated and the filter will be applied to all transactions received.

To Update Email Address Settings

The **Email Address Filter** screen allows you to manage the email address settings for your terminal. These settings enable you to designate and maintain a list of email addresses of cardholders from whom you do not accept transactions. You may enable the Converge **Global Email Address Settings** or add your own list of email addresses to block.

If you use this filter and receive transactions from an email address that is not in your allowed list, the transactions will be declined.

The **Email Address Filter** settings have a global setting and a local setting. The first checkbox enables/disables the global setting of the rule for the terminal. The second check box enables/disables the local setting of the rule for the terminal.

You can enter IP/email addresses without enabling the local setting of the rule for the terminal. You cannot enable the local setting until at least one IP/email address is entered; an error message will display when you clicks the **Update** button.

You can remove IP/email addresses without disabling the local setting of the rule; however if you remove all entries and click the **Update** button you will get an error message. When removing all entries, you will have to uncheck the local setting checkbox before clicking the **Update** button.

Note: To use this filter, an email address must be submitted with your transactions. Thus, you must edit your payment form settings to set the **Email Address** field (`ssl_email`) as required in the payment fields screen under the **Terminal | Merchant | Payment Fields** menu option.

The **Email Address Filter** screen displays:

Email Address Filter

This filter enables you to designate and maintain a list of Email Addresses of cardholders from which you do not accept transactions. You may enable the Converge Global Email Address Settings or add your own list of Email Addresses to block.

If you are using this filter and receive transactions from an Email Address that is in your blocked list or an Email Address was not provided, the transactions will be declined.

IMPORTANT NOTES:
In order to use this filter you must submit the Email Address via process.do and processxml.do, you must edit your payment form settings to set the email field (ssl_email) as required.

By enabling the filter check box and selecting the Update button, you are activating the filter settings for your terminal immediately. The filter will be applied to all transactions received. You may modify, enable, or disable this filter at any time.

Email Address Filter Settings

☐ Enable Global Settings

The Converge Global Email Address Filter is predetermined list of Email addresses known for fraudulent activities. There is no merchant-controlled configuration for this filter; management of this filter is handled exclusively by Elavon.

☒ Enable Email Address Settings

Please add Email Addresses from which transaction requests are not allowed. You must add at least one Email Address to enable this filter.

Display:

no entries

No items in list

To Update the Global Email Address Settings

1. Select **Terminal | Advanced | Fraud Protection Rules**.

The **Fraud Protection Rules** screen displays.

2. Click **Email Address Filter**.

The **Email Address Filter** screen displays.

3. Select the **Enable Global Settings** check box.

A message displays to confirm activation.

Message from webpage

? You have selected to enable this filter; the filter and its settings will be applied to your transactions once you click on the update button. Do you want to proceed?

4. Click **OK**.

Note: To disable activation, uncheck the **Enable Global Settings** check box. A message displays to confirm deactivation.

5. Click **Update**.

The filter settings for your terminal are immediately activated and the filter will be applied to all transactions received.

To Add an Email Address

1. Select **Terminal | Advanced | Fraud Protection Rules**.

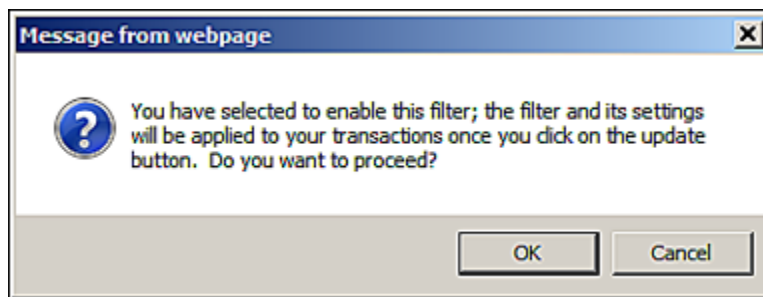
The **Fraud Protection Rules** screen displays.

2. Click **Email Address Filter**.

The **Email Address Filter** screen displays.

3. Select the **Enable Email Address Settings** check box.

A message displays to confirm activation.



4. Click **OK**.

Note: To disable activation, uncheck the **Enable Email Address Settings** check box. A message displays to confirm deactivation.

5. In the text box provided, enter an email address from which transaction requests are not allowed.

6. Click **Add**.

The newly added email address displays.

7. To add another email address, repeat steps 5 to 6.

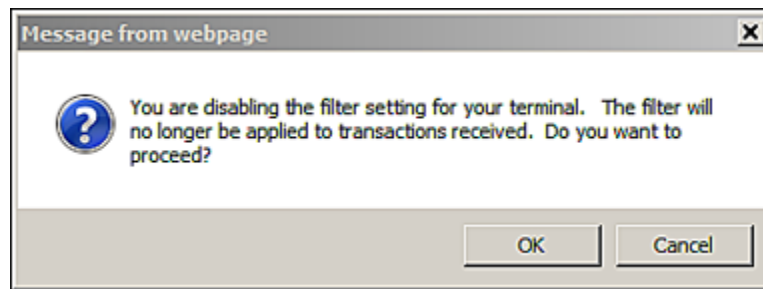
8. Click **Update**.

The filter settings for your terminal are immediately activated and the filter will be applied to all transactions received.

To Remove an Email Address

1. Click **Remove** next to the email address you wish to remove.

A message displays to confirm removal.



2. Click **OK**.

To Update Card Number Settings

The **Card Number Filter** screen allows you to manage the card number settings for your terminal. These settings enable you to designate and maintain a list card numbers of cardholders from whom you do not accept transactions. You may enable the Converge **Global Card Number Settings** or add your own list of card numbers to block.

The **Card Number Filter** settings have a global setting and a local setting. The first checkbox enables/disables the global setting of the rule for the terminal. The second check box enables/disables the local setting of the rule for the terminal.

You can enter IP/email addresses without enabling the local setting of the rule for the terminal. You cannot enable the local setting until at least one IP/email address is entered; an error message will display when you click the **Update** button.

You can remove IP/email addresses without disabling the local setting of the rule; however if you remove all entries and click the **Update** button you will get an error message. When removing all entries, you will have to uncheck the local setting checkbox before clicking the **Update** button.

If you use this filter and receive transactions from card number that is in your blocked list, the transactions will be declined.

The **Card Number Filter** screen displays:

Card Number Filter

This filter enables you to designate and maintain a list of card numbers of cardholders from which you do not accept transactions. You may enable the Converge Global Card Number Settings or add your own list of card numbers to block.

If you are using this filter and receive transactions from card number that is in your blocked list, the transactions will be declined.

IMPORTANT NOTE:
By enabling the filter check box and selecting the Update button, you are activating the filter settings for your terminal immediately. The filter will be applied to all transactions received. You may modify, enable, or disable this filter at any time.

Card Number Filter Settings

☐ **Enable Global Settings**

The Converge Global Card Number Filter is predetermined list of card numbers known for fraudulent activities. There is no merchant-controlled configuration for this filter; management of this filter is handled exclusively by Elavon.

☐ **Enable Card Number Settings**

Please add card numbers from which transaction requests are not allowed. You must add at least one card number to enable this filter.

Add

Display:

1 41*****1111 **Remove**

Update **Cancel**

To Update the Global Card Number Filters Settings

1. Select **Terminal | Advanced | Fraud Protection Rules**.

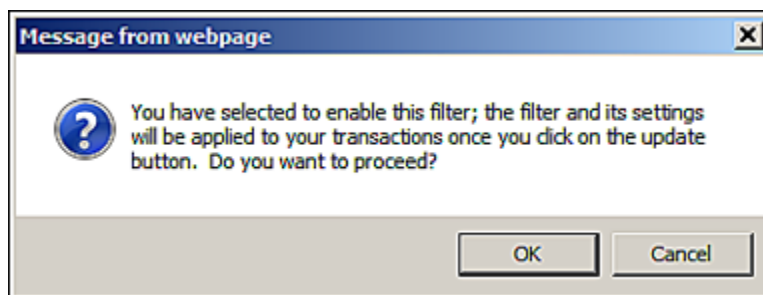
The **Fraud Protection Rules** screen displays.

2. Click **Card Number Filter**.

The **Card Number Filter** screen displays.

3. Select the **Enable Global Settings** check box.

A message displays to confirm activation.



4. Click **OK**.

Note: To disable activation, uncheck the **Enable Global Settings** check box. A message displays to confirm deactivation.

5. Click **Update**.

The filter settings for your terminal are immediately activated and the filter will be applied to all transactions received.

To Add a Card Number

1. Select **Terminal | Advanced | Fraud Protection Rules**.

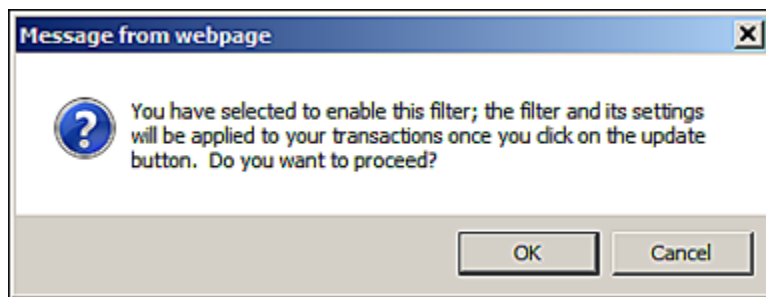
The **Fraud Protection Rules** screen displays.

2. Click **Card Number Filter**.

The **Card Number Filter** screen displays.

3. Select the **Enable Card Numbers Settings** check box.

A message displays to confirm activation.



4. Click **OK**.

Note: To disable activation, uncheck the **Enable Card Numbers Settings** check box. A message displays to confirm deactivation.

5. In the text box provided, enter a card number from which transaction requests are not allowed.

6. Click **Add**.

The newly added card number displays.

7. To add another email address, repeat steps 5 to 6.

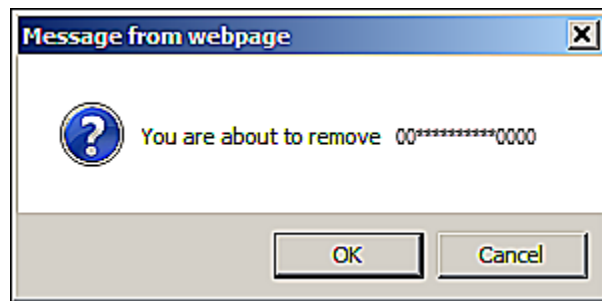
8. Click **Update**.

The filter settings for your terminal are immediately activated and the filter will be applied to all transactions received.

To Remove a Card Number

1. Click **Remove** next to the card number you wish to remove.

A message displays to confirm removal.



2. Click **OK**.

To Update Transaction Velocity Filter Settings

This filter lets you specify a threshold for the number of transactions allowed, all transactions received that exceed the threshold will be declined.

This rule only has a local setting; there is no global setting. The **Transaction Velocity Filter** rule includes three individual rules for the terminal:

- Number of transactions allowed per day (1440 minutes)
- Number of transactions allowed per hour (60 minutes)
- Number of transactions allowed from the same IP Address per hour (60 minutes)

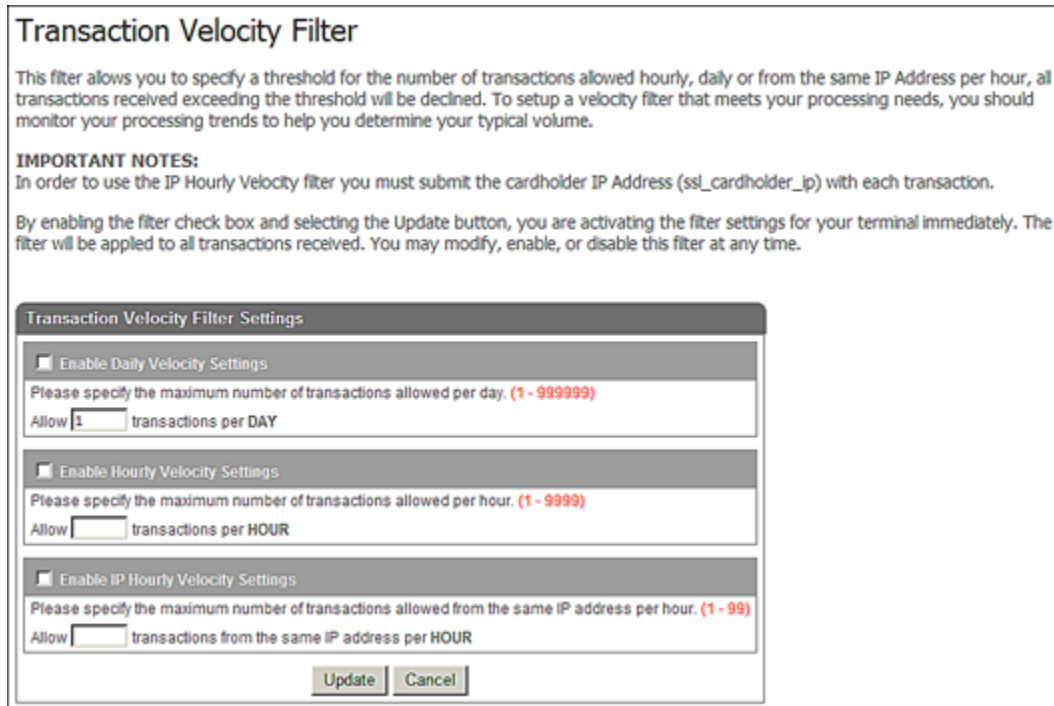
An error message is displayed when:

- You check the **Enable Daily Velocity Settings** check box and click **Update** without providing the number of transactions allowed per day.
- The user checks the **Enable Hourly Velocity Settings** check box and clicks **Update** without providing the number of transaction allowed per hour.
- The user checks the **Enable IP Hourly Velocity Settings** check box and clicks **Update** without providing the number of transactions per hour.

You can enter the number of transactions allowed per day or per hour without having to check the associated **Enable** check box.

Users can uncheck the **Enable** check boxes without having to remove the number of transactions allowed per day or per hour.

The **Transaction Velocity Filter** screen displays:



Transaction Velocity Filter

This filter allows you to specify a threshold for the number of transactions allowed hourly, daily or from the same IP Address per hour, all transactions received exceeding the threshold will be declined. To setup a velocity filter that meets your processing needs, you should monitor your processing trends to help you determine your typical volume.

IMPORTANT NOTES:
In order to use the IP Hourly Velocity filter you must submit the cardholder IP Address (ssl_cardholder_ip) with each transaction.

By enabling the filter check box and selecting the Update button, you are activating the filter settings for your terminal immediately. The filter will be applied to all transactions received. You may modify, enable, or disable this filter at any time.

Transaction Velocity Filter Settings

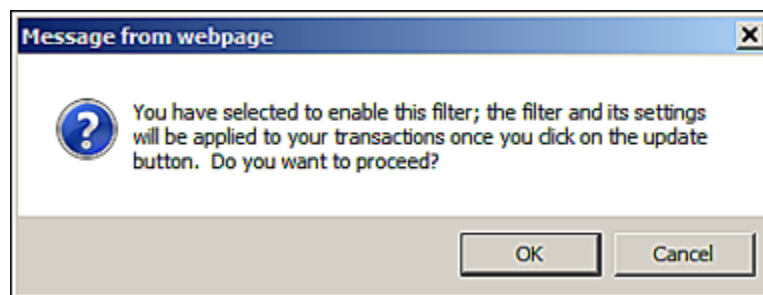
☐ **Enable Daily Velocity Settings**
Please specify the maximum number of transactions allowed per day. (1 - 999999)
Allow transactions per DAY

☐ **Enable Hourly Velocity Settings**
Please specify the maximum number of transactions allowed per hour. (1 - 9999)
Allow transactions per HOUR

☐ **Enable IP Hourly Velocity Settings**
Please specify the maximum number of transactions allowed from the same IP address per hour. (1 - 99)
Allow transactions from the same IP address per HOUR

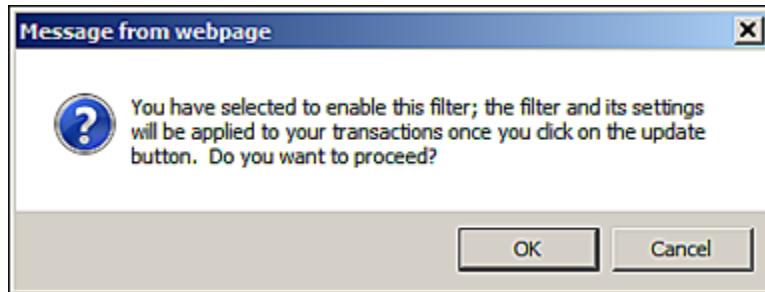
To Specify Daily Velocity Settings:

1. To specify the maximum number of transactions you want to allow per day, enter a number between 1 and 9,999 in the **Allow___transactions per Day** in the **Enable Daily Velocity Settings** portion of the screen and click the check box. The following message will appear.



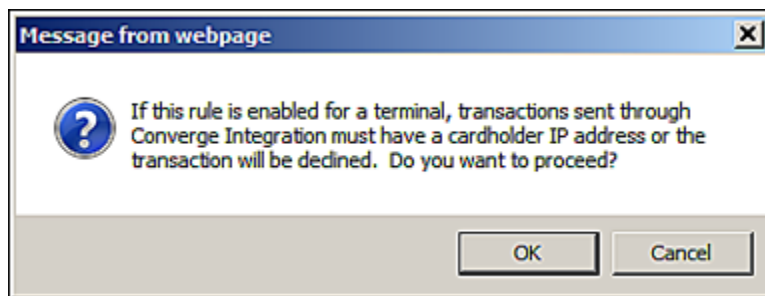
Click **OK** and the filtering you have specified will be in effect.

2. To specify the maximum number of transactions you want to allow per day, enter a number between 1 and 999,999 in the **Allow___transactions per Hour** in the **Enable Hourly Velocity Settings** portion of the screen and click the check box. The following message will appear.



Click **OK** and the filtering you have specified will be in effect.

3. To specify the maximum number of transactions you want to allow per hour from the same IP address, enter a number between 1 and 9,999 in the **Allow___transactions from the same IP address per hour** in the **Enable IP Hourly Velocity Settings** portion of the screen and click the check box. The following message will appear.



Click **OK** and the filtering you have specified will be in effect.

4. Once you have made your selection, click the **Update** button. A message will display that your fraud value successfully updated.

Fraud value successfully updated.

Transaction Velocity Filter Settings

☒ Enable Daily Velocity Settings
Please specify the maximum number of transactions allowed per day. (1 - 999999)
Allow transactions per DAY

☒ Enable Hourly Velocity Settings
Please specify the maximum number of transactions allowed per hour. (1 - 9999)
Allow transactions per HOUR

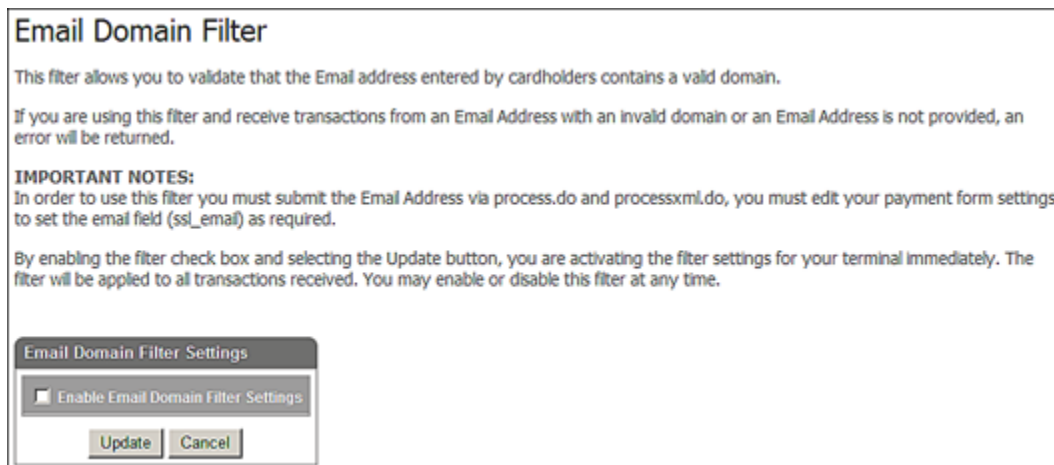
☒ Enable IP Hourly Velocity Settings
Please specify the maximum number of transactions allowed from the same IP address per hour. (1 - 99)
Allow transactions from the same IP address per HOUR

To Update Email Domain Settings

The **Email Domain Filter** screen allows you to manage the email domain settings for your terminal. These settings enable you to validate that the email address entered by cardholders on transactions has a valid domain.

If you are using this filter and receive transactions from an email address with an invalid domain or an email address is not provided, an error will be returned.

Note: To use this filter, an email address must be submitted with your transactions. Thus, you must edit your payment form settings to set the email address field (`ssl_email`) as required in the payment fields screen under the **Terminal | Merchant | Payment Fields** menu option.



The screenshot shows the 'Email Domain Filter' settings screen. It contains the following text:

Email Domain Filter

This filter allows you to validate that the Email address entered by cardholders contains a valid domain.

If you are using this filter and receive transactions from an Email Address with an invalid domain or an Email Address is not provided, an error will be returned.

IMPORTANT NOTES:
In order to use this filter you must submit the Email Address via `process.do` and `processxml.do`, you must edit your payment form settings to set the email field (`ssl_email`) as required.

By enabling the filter check box and selecting the Update button, you are activating the filter settings for your terminal immediately. The filter will be applied to all transactions received. You may enable or disable this filter at any time.

Email Domain Filter Settings

☐ Enable Email Domain Filter Settings

Update Cancel

1. Select **Terminal | Advanced | Fraud Protection Rules**.

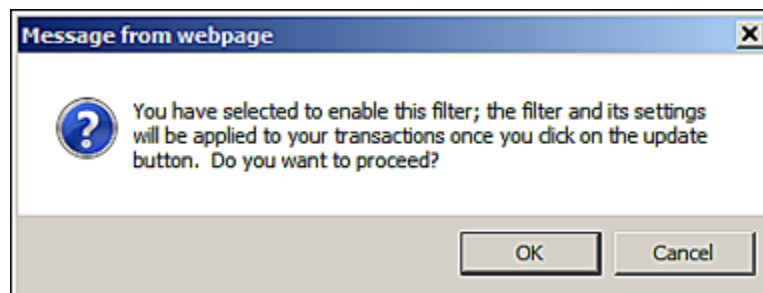
The **Fraud Protection Rules** screen displays.

2. Click **Email Domain Filter**.

The **Email Domain Filter** screen displays.

3. Select the **Enable Email Domain Settings** check box.

A message displays to confirm activation.



4. Click **OK**.

Note: To disable activation, uncheck the **Enable Email Domain Settings** check box. A message displays to confirm deactivation.

5. Click **Update**.

The filter settings for your terminal are immediately activated and the filter will be applied to all transactions received.

To Update Transaction Timeout Settings

The **Transaction Timeout Filter** screen allows you to manage the transaction timeout settings for your terminal. These settings enable you to specify a time limit (between 1 and 15 minutes), for a single transaction. If you use this filter and the transaction exceeds the time allowed for processing, it will be declined.

Transaction Timeout Filter

This filter enables you to specify a time limit, between 1 and 15 minutes; for a single transaction. If the transaction exceeds the time allowed for processing, it will be declined.

IMPORTANT NOTES:
By enabling the filter check box and selecting the Update button, you are activating the filter settings for your terminal immediately. The filter will be applied to all transactions received. You may modify, enable, or disable this filter at any time.

Transaction Timeout Filter Settings

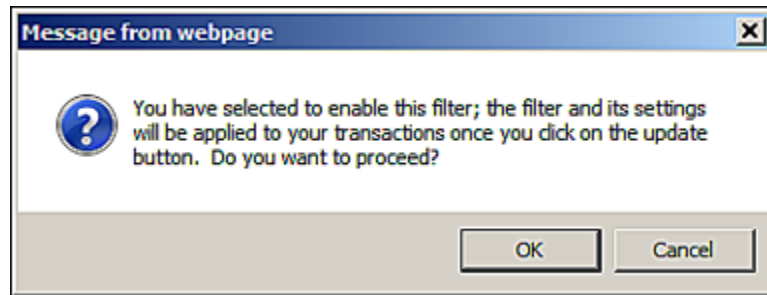
☒ Enable Transaction Timeout Settings

minutes

Update **Cancel**

1. Select **Terminal | Advanced | Fraud Protection Rules**.
The **Fraud Protection Rules** screen displays.
2. Click **Transaction Timeout Filter**.
The **Transaction Timeout Filter** screen displays.
3. Enter time limit in minutes.
4. Select the **Enable Transaction Timeout Settings** check box.

A message displays to confirm activation.



5. Click **OK**.

Note: To disable activation, uncheck the **Enable Transaction Timeout Settings** check box. A message displays to confirm deactivation.

6. Click **Update**.

The filter settings for your terminal are immediately activated and the filter will be applied to all transactions received.

Setting Up Business Rules

The **Business Rules** screen lets you create your own processing business rules. These rules can be added, updated and deleted:

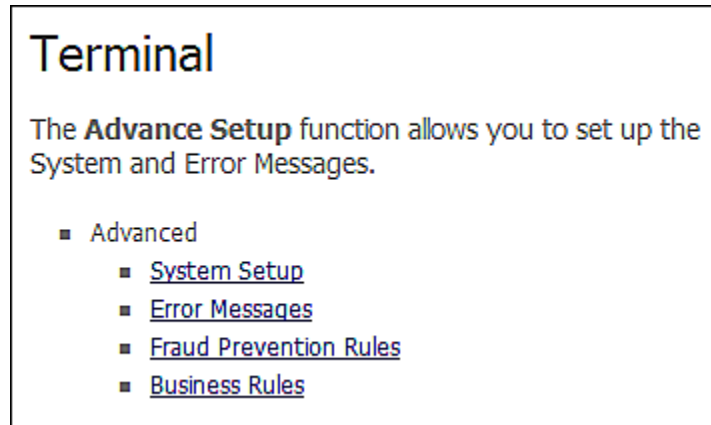
- Only merchant administrators can set system-level rules. These rules cannot be added, updated or deleted by standard users.
- Business rules are set up within a specific terminal and apply only to transactions that are processed through that terminal.
- Business rules can only be set up in terminals that are set up as *Terminal-Based*.
- Converge will only apply business rules (other than those that check for duplicate transactions) to credit card transactions.
- All business rules are optional and apply only to transactions submitted to the application through process.do and processxml.do, for all market segments.
- **Pre-Processing** and **Post-Processing** rules currently do not apply when transactions are processed in the Virtual terminal, including duplicate checking.
- Business rules run in order, from top to bottom. You can change the order of the rules using the arrow buttons next to each rule. No more than a combined total of 10 **Pre-Processing** and **Post-Processing** rules can be added to a terminal at a time.
- Once a rule is triggered, no other rules will operate.
- Actions set up in a rule cannot be performed unless that specific rule is triggered.

- Return rules do not affect other transaction rules.
- Transactions that are set to **Decline** using business rules will display in the **Current Batches Error** section with the reason for decline set to the **Comparison Value** from the rule that was triggered (for example: **Ship to Postal Code**, **Bill to Postal Code**, **Transaction Amount**, **Return Amount**, **AVS Response**, or **CVV2 Response**).
- Reversals will be submitted for credit card transactions that were authorized by the issuer but have been declined based on the AVS or CVV rules.

Transactions that are **Set to Review** or **Pend** will display in the **Current Batches Main** or **Auth Only** sections. You can **Unpend** or **Release** those transactions prior to settlement.

To Add New Business Rules

1. Select **Terminal | Advanced | Business Rules**.



The **Business Rules** screen displays.

Business Rules

This form is used to setup processing rules.

Pre-Processing Rules

Rule Name	Type	Fields	Operator	Criteria	True Action	False Action	Email
Add New Rule							

Post-Processing Rules

Rule Name	Type	Fields	Operator	Criteria	True Action	False Action	Email
Add New Rule							

2. Based on your requirements, under **Pre-Processing Rules** or **Post-Processing Rules**, click **Add New Rule**.

The **New Rule** screen displays.

New Rule

Add a new business rule.

Add New Rule

Rule Name

Value

Operator

Criteria or Value

True Action or Rule

False Action or Rule

Send Email

Add New Rule **Cancel**

3. Enter the name of the new business rule in the **Rule Name** field.
4. In the **Value** drop-down list, select the field to use as a comparison value for the rule from the following options:
 - Ship To Postal Code
 - Bill To Postal Code
 - Tran Amount
 - Return Amount
 - Duplicate Transaction
5. In the **Operator** drop-down list, select the comparison operator from the following:
 - Equal To
 - Not Equal To
 - Greater Than
 - Greater Than
 - Less Than

- Less Than Equal To
 - Not in Set
6. In the **Criteria** drop-down list, select the criteria to use for comparison from the following:
- Ship To Postal Code
 - Bill To Postal Code
 - Time Period
 - Invoice Number
7. Enter an **Or Value** as a second value or value set for comparison with the transaction, return amount, AVS response, or CVV2 response.
- If there is more than one value, separate each value with a comma and use the **Operator** value **Not in Set**.
 - Refer to the **AVS Response Codes** and **CVV2 Response Codes** sections in the **Response Codes** chapter in the *Converge Transaction Processing Guide* for a complete list of AVS and CVV response codes.
8. Select an action from the **True Action** drop-down list. This is the action that takes place when the criteria comparison is determined to be true.

The **Or Rule** field is populated by existing business rules. The **Or Rule** can be selected instead of the **True Action**.

New Rule

Add a new business rule.

New Rule

Add New Rule

Rule Name: BillZipRule

Value: Bill To Postal Code

Operator: Not Equal To

Criteria: Ship To Postal Code

True Action: [Empty]

False Action: [Empty]

Send Email: Send Terminal Email

or Rule: [MatchZip]

Buttons: Add New Rule, Cancel

9. Select an action from the **False Action** drop-down list. This is the action that takes place when the criteria comparison is determined to be false.

The **Or Rule** field is populated by existing business rules that have been created. This **Or Rule** can be selected instead of the **False Action**.

10. In the **Send Email** drop-down list, select an email action to specify an email action, depending on the rule comparison, from the following:
 - Send Merchant Email
 - Send Terminal Email
 - Send SMS Email
11. Once you have entered the information for the new rule, click **Add New Rule** to save the rule. A screen message indicates the rule added successfully. The new rule displays in the **Processing Rules** table.

Business Rules

This form is used to setup processing rules.

MatchZip - Rule Added successfully.

Pre-Processing Rules

Rule Name	Type	Fields	Operator	Criteria	True Action	False Action	Email
▲ ▼ MatchZip	Merchant	Bill To Postal Code	Equal To	Ship To Postal Code		Decline	Send Merchant Email

Add New Rule

Post-Processing Rules

Rule Name	Type	Fields	Operator	Criteria	True Action	False Action	Email
-----------	------	--------	----------	----------	-------------	--------------	-------

Add New Rule

To Edit Business Rules

Business Rules can be edited by those that have the correct user rights.

1. To edit an existing rule, select the rule name from the **Pre-Processing Rules** table.

Business Rules

This form is used to setup processing rules.

MatchZip - Rule Added successfully.

Pre-Processing Rules								
Rule Name	Type	Fields	Operator	Criteria	True Action	False Action	Email	
▲ ▼ MatchZip	Merchant	Bill To Postal Code	Equal To	Ship To Postal Code		Decline	Send Merchant Email	

Add New Rule

Post-Processing Rules							
Rule Name	Type	Fields	Operator	Criteria	True Action	False Action	Email
Add New Rule							

2. On the **Update Rule** screen, enter or adjust the fields as necessary.

Update Rule

Change the Parameters of an existing business rule.

Update Business Rule		
Update		
Rule Name	MatchZip	
Value	Bill To Postal Code ▼	
Operator	Equal To ▼	
Criteria	Ship To Postal Code ▼	
True Action	▼	or Rule ▼
False Action	Decline ▼	or Rule ▼
Send Email	Send Merchant Email ▼	
<input type="button" value="Update"/> <input type="button" value="Delete"/> <input type="button" value="Cancel"/>		

3. To update the business rule, click **Update**.

The business rule updated successfully message displays.

Business Rules

This form is used to setup processing rules.

MatchZip - Rule Updated successfully.

Pre-Processing Rules

Rule Name	Type	Fields	Operator	Criteria	True Action	False Action	Email
▲ ▼ MatchZip	Merchant	Bill To Postal Code	Not Equal To	Ship To Postal Code	Decline		Send Merchant Email

Add New Rule

Post-Processing Rules

Rule Name	Type	Fields	Operator	Criteria	True Action	False Action	Email
-----------	------	--------	----------	----------	-------------	--------------	-------

Add New Rule

To Delete Business Rules

1. To delete an existing rule, select the rule name from the **Pre-Processing Rules** table.
2. On the **Update Rule** screen, click **Delete**.

The business rule deleted successfully message displays.

Business Rules

This form is used to setup processing rules.

MatchZip - Rule Deleted successfully.

Pre-Processing Rules

Rule Name	Type	Fields	Operator	Criteria	True Action	False Action	Email
-----------	------	--------	----------	----------	-------------	--------------	-------

Add New Rule

Post-Processing Rules

Rule Name	Type	Fields	Operator	Criteria	True Action	False Action	Email
-----------	------	--------	----------	----------	-------------	--------------	-------

Add New Rule

Additional Resource Guides

By now an Administrator is able to:

- Configure and manage users
- Configure and manage account settings
- Configure the terminal and payment fields

Your Virtual Terminal is now ready to process transactions. For additional information on how to use your Virtual Terminal for processing transactions refer to the *Converge Transaction Processing Guide*.

For additional information regarding the integration of your Virtual Terminal refer to the *Converge Developer Guide*.

Glossary

A

- **Account Balance (Response screen field)**
Displays the account balance.
- **Approval Code (Response screen field)**
Displays the 6-digit approval number received upon successful authorization.
- **Address Verification Service (AVS)**
Compares the billing address submitted by the customer for the transaction with the address on file for the cardholder at the card issuing bank. To implement AVS, you must collect the customer's billing address and ZIP code.
- **AVS Code**
A code returned to a merchant by a credit card issuing bank referencing the results of an AVS match.
- **AVS Response Code (Response screen field)**
Displays the address verification response for this transaction.

B

- **Batches-Edit Transactions (user right)**
Allows access to the Batches-Edit Transaction option.
- **Batches-Return Transactions (user right)**
Allows access to initiate a return from a Settled Credit Card Transaction in the Settled Batches menu.
- **Batches-Settle Transactions (user right)**
Allows access to the Settle button in the Current Batches section to settle selected transactions.
- **Batches-View (user right)**
Allows a user to view the unsettled transactions in the Current Batches section.
- **Batches-View Settled History (user right)**
Allows access to the Settled Batches section.

- **Batches-Void Delete (user right)**

Allows access to the Void and Delete buttons in Current Batches section. Void applies to both Host and Terminal-based. Delete applies to Terminal-based only. Converge does not permit batches to be voided while the auto-settle process is running, or when a manual settlement process is running.

- **Bi-Monthly**

Transactions with a billing cycle of bi-monthly, Converge sends the transactions to Stratus for authorization every other month starting on the transactions' Start Payment Date.

- **Bi-Weekly**

Transactions with a billing cycle of bi-weekly, Converge sends the transactions to Stratus for authorization every 2 weeks (every 14 days) starting on the transactions' Start Payment Date.

C

- **CID**

Credit card security code for American Express®.

- **CVC2**

Credit card security code for MasterCard®.

- **CVV2**

Credit card security code for Visa®.

- **Card Code Verification (CCV)**

This feature compares the card code submitted by the customer for the transaction with the card code on file for the cardholder at the card issuing bank. Filter settings in the Merchant Interface allow you to reject transactions based on the CCV response received.

- **Card Not Present (CNP)**

A cardholder's credit card is not physically presented to a merchant at the time of the transaction. This term is used to differentiate between e-Commerce/Internet merchants, such as those that operate through Web sites or from mail order/telephone order locations from retail merchants.

- **Card Present (CP)**

Card present transactions are those in which a credit card is physically present, such as retail merchants, because the card is available for inspection. Those transactions are considered less risky and therefore carry lower fees than online or phone transactions.

- **Card Verification Value (CVV) Code**

CVV is one of the credit card industry's several acronyms for the credit card security code that helps to verify the legitimacy of a credit card. Depending on the card, the security code can be a three-digit or four-digit number, printed either on the back of the card or the front. Other card issuers call their security codes CVV2 (Visa®), CVC2 (MasterCard®) or CID (American Express®).

- **CVV2 Response Code (Response screen field)**

Displays the CVV2, CVC2 or CID response for this transaction.

- **Cashback**
The amount of cash consumers can receive when they use Debit cards. This amount is added to the total purchase amount.
- **Cash Benefit Inquiry Transaction**
Allows you to get the current balance of a Cash Benefit card. This transaction requires a PIN pad and must be swiped.
- **Cash Benefit-Inquiry (user right)**
Allows access to process Cash Benefit-Inquiry transactions.
- **Cash Benefit Purchase Transaction**
Allows you to process cash benefit cards and receive cash back similar to debit transactions. This type of transaction requires the use of a PIN pad and can be swiped or manually entered.
- **Cash Benefit-Purchase (user right)**
Allows access to process Cash Benefit-Purchase transactions.
- **Create Subordinates (user right)**
Allows access to the Create User section.
- **Credit Card Auth Only Transaction**
Allows you to pre-approve transactions that will be forced through or converted to sale at a later date.
- **Credit Card-Auth Only (user right)**
Allows access to process Credit Card-Auth Only transactions.
- **Credit Card AVS Only/Verification Transaction**
Allows you to verify if the address given for the transaction matches that of the cardholder for an AVS Only transaction. A Verification transaction verifies if the address and the CVV value given matches the cardholder's information.
- **Credit Card- AVS Only/Verification (user right)**
Allows access to process Credit Card AVS Only transactions in which an address match is checked or Verification transactions in which an address and CVV value are checked for a match.
- **Credit Card Force Transaction**
Forces sale transactions when the approval code was previously obtained, such as through voice authorization. This transaction type requires the Approval Code to be manually entered for processing. The Approval Code is a required field for this transaction.
- **Credit Card-Force (user right)**
Allows access to process Credit Card-Force transactions.
- **Credit Card Inquiry Transaction**
Allows you to check the balance on pre-paid Visa® or MasterCard® gift cards.

- **Credit Card-Inquiry (user right)**
Allows access to process Credit Card-Inquiry transactions.
- **Credit Card Installment Transaction**
Allows you to set up payment amounts, the number of payments and the billing cycle in which the payments occur.
- **Credit Card-Installment (user right)**
Allows access to add Credit Card-Installment transactions.
- **Credit Card Multi-entry Transaction**
Allows you to enter multiple credit card transactions from one screen.
- **Credit Card-Multi-entry (user right)**
Allows access to process Credit Card-Multi-entry transactions.
- **Credit Card Recurring Transaction**
Allows you to set up payment amounts and billing cycles in which the payments occur.
- **Credit Card-Recurring (user right)**
Allows access to add Credit Card-Recurring transactions.
- **Credit Card Return**
Allows you to enter refund transactions for previous sales.
- **Credit Card-Return (user right)**
Allows access to process Credit Card-Return transactions.
- **Credit Card Sale**
Allows you to obtain real-time authorization for credit card sale transactions.
- **Credit Card-Sale (user right)**
Allows access to process Credit Card-Sale transactions.
- **Credit Card-Unencrypted Hand Key (user right)**
Allows access to process hand keyed transactions outside of an encrypting device for those terminals that are setup with a device for all supported hand key transactions.

D

- **Date/Time (Response screen field)**
Displays the date and time at which the transaction took place. The time stamp displayed is based on the time zone that is selected in your terminal profile.
- **Debit Card Purchase Transaction**
Allows you to get real-time authorizations for Debit Card sale transactions.

- **Debit Card-Purchase (user right)**
Allows access to process Debit Card-Purchase transactions.
- **Debit Card Return Transaction**
Allows you to enter refund transactions for previous sales.
- **Debit Card-Return (user right)**
Allows access to process Debit Card-Return transactions.
- **Debit Card Inquiry Transaction**
Allows you to get account balances for debit cards.
- **Debit Card-Inquiry (user right)**
Allows access to process Debit Card-Inquiry transactions.
- **Dynamic DBA**
This gives the merchant the ability to control the descriptor on their customer's credit card statements.

E

- **Edit Business Rule (user right)**
Allows access to the Business Rule section.
- **Edit Terminal Associations (user right)**
Allows access to Terminal Associations section.
- **Edit Terminal Setup (user right)**
Allows access to the Terminal Setup section.
- **Edit User Rights (user right)**
Allows access to the Edit Rights section under the Find/Edit User section.
- **Electronic Check Conversion Only Transaction**
Allows you to enter an ECS purchase transaction for a Conversion Only process.
- **Electronic Check Guarantee Transaction**
Allows you to enter an ECS purchase transaction for a Guarantee process.
- **Electronic Check Multientry - Conversion Only Transaction**
Allows you to enter multiple ECS purchase transactions for Conversion Only processes.
- **Electronic Check Multientry -Guarantee Transaction**
Allows you to enter multiple ECS purchase transactions for a Guarantee process.
- **Electronic Check Verification Transaction**
Allows you to enter an ECS Purchase transaction for a Verification process.

- **Electronic Check Multientry Verification Transaction**
Allows you to enter multiple ECS purchase transactions for a Verification process.
- **Electronic Check-Multientry (user right)**
Allows access to process Electronic Check-Multientry transactions.
- **Electronic Check-Purchase (user right)**
Allows access to process Electronic Check-Purchase transactions.
- **EMV Processing**
Europay, MasterCard, and Visa (EMV) is a global standard for credit and debit cards that's based on chip card technology. EMV cards, which are also referred to as Chip and PIN cards or Smartcards, are manufactured with an embedded microchip that offer strong security features and other capabilities not available on a magnetic strip card.
- **Export Scripts**
Export scripts allow merchants to request the results of their payment transactions be returned to their web sites for inventory purposes, sales analysis, or customer database maintenance.

F

- **Find/Edit User (user right)**
Allows access to the Find/Edit User section.
- **Food Stamp Force Purchase Transaction**
Allows you to manually enter Food Stamp "Voucher Clear" Purchase transactions. This transaction requires a 15-digit Voucher Clear Number from Merchant's EBT Food Stamp sales slip and the Voucher Clear Approval Code obtained previously by phone. The PIN number is not prompted for on the Voucher Clear transactions.
- **Food Stamp-Force Purchase (user right)**
Allows access to process Food Stamp-Force Purchase transactions.
- **Food Stamp Force Return Transaction**
Allows you manually enter Food Stamp "Voucher Clear" Return transactions. This transaction requires a 15-digit Voucher Clear Number from Merchant's EBT Food Stamp sales slip and the Voucher Clear Approval Code obtained previously by phone. The PIN number is not prompted for on the Voucher Clear transactions.
- **Food Stamp-Force Return (user right)**
Allows access to process Food Stamp-Force Return transactions.
- **Food Stamp Inquiry Transaction**
Allows you to get the current balances of food stamp cards.
- **Food Stamp-Inquiry (user right)**
Allows access to process Food Stamp-Force Inquiry.

- **Food Stamp Purchase Transaction**
Allows you to obtain an authorization on an EBT card.
- **Food Stamp-Purchase (user right)**
Allows access to process Food Stamp- Purchase transactions.
- **Food Stamp Return Transaction**
Allows you to credit money back onto the EBT card.
- **Food Stamp-Return (user right)**
Allows access to process Food Stamp-Return transactions.

G

- **Gift Card Activation Transaction**
Allows you to enter gift card activation transactions.
- **Gift Card-Activation (user right)**
Allows access to process Gift Card-Activation transactions.
- **Gift Card-Card Return Transaction**
Allows you to refund the balances on gift card account.
- **Gift Card-Card Return (user right)**
Allows access to process Gift Card-Return transactions.
- **Gift Card Credit Transaction**
Allows you to refund previous redemption transactions to gift card accounts.
- **Gift Card-Credit (user right)**
Allows access to process Gift Card-Credit transactions.
- **Gift Card Inquiry Transaction**
Allows you to check the current balances of gift card accounts.
- **Gift Card-Inquiry (user right)**
Allows access to process Gift Card-Inquiry transactions.
- **Gift Card Redemption Transaction**
Used to make purchases with the balances on gift card accounts.
- **Gift Card-Redemption (user right)**
Allows access to process Gift Card-Redemption transactions.
- **Gift Card Reload Transaction**
Allows you to increase the current balance of gift card accounts.

- **Gift Card-Reload (user right)**

Allows access to process Gift Card-Reload transactions.

I

- **Installment Billing**

Used to pay off a known amount over a specific period of time.

- **IP Address**

An Internet Protocol address (IP address) is a numerical label assigned to each device (e.g., computer, printer) participating in a computer network that uses the Internet Protocol for communication. IP addresses consist of four numbers separated by periods (also called a 'dotted-quad') and look something like 127.0.0.1.

- **IP Address – Public**

Every device connected to the public Internet is assigned a unique number known as an IP address.

- **IP Limitations Rights (user right)**

Allows a user to enter up to fifty (50) IP addresses that can access an account in Converge. If selected, only users logging in from the IP addresses that were entered can access the account.

Note: IP Limitation only applies to `Login.do` only; IP limitation feature does not apply to `Process.do` and `Processxml.do`

M

- **Magnetic Stripe Reader (MSR)**

A hardware device that reads the information encoded in the magnetic stripe located on the back of a plastic card.

- **Message (Response screen field)**

Contains the 16-character authorization response message.

P

- **Partial Approvals**

When a Pre-Paid authorization is initiated, the issuer can respond with an approval amount less than the requested amount. Merchants can obtain the remainder of the purchase amount in another form of payment.

- **Partial Auth Capability**

The application is capable of submitting one amount for authorization understanding that only part of the requested amount could be approved. For example: \$100.00 purchase where \$75.00 is approved on a card. The balance of \$25.00 is understood to be still outstanding to complete the purchase.

- **Payment Type (Response screen field)**

Displays the form of payment taken for the transaction.

- **Pop-up**

Small Internet browser window that appear on top of the Web site you are viewing.

- **Pop-up Blocker**

A feature in your Internet browser that allows you to limit or block most pop-ups.

- **Public IP Address**

An Internet Protocol address (IP address) is a numerical label assigned to each device (e.g., computer, printer) participating in a computer network that uses the Internet Protocol for communication

Every device connected to the public Internet is assigned a unique number known as an Internet Protocol (IP) address. IP addresses consist of four numbers separated by periods (also called a 'dotted-quad') and look something like 127.0.0.1.

Q

- **Quarterly**

Transactions with a billing cycle of quarterly, Converge sends the transactions to Stratus for authorization every three months starting on the transactions' Start Payment Date.

R

- **Record Number(Response screen field)**

Displays the transaction record number in the terminal. This value is only displayed if the profile is configured for Host-Based Processing.

- **Recurring Billing**

Consists of the same transaction amount repeated for an indefinite length of time.

- **Response (Response screen field)**

Contains the 2-character authorization response code.

- **Reversals**

A real-time transaction used to cancel an open authorization and restore the cardholders open to buy for the full amount previously authorized. This transaction is usually initiated when the cardholders decide that they do not want to proceed with the transactions. Reversals will free up cardholders' open to buy amounts by reducing issuer holds on available balances when transactions are not completed, therefore reducing declines at the point of sale and the amount of cardholder complaints.

S

- **Semi-Annually**

Transactions with a billing cycle of semi-annually, Converge sends the transactions to Stratus for authorization every six months starting on the transactions' Start Payment Date.

- **Semi-Monthly**

Transactions with a billing cycle of semi-monthly, Converge sends the transactions to Stratus for authorization every other month starting on the transactions' Start Payment Date.

- **Semester**

Transactions with a billing cycle of semester, Converge sends the transactions to Stratus for authorization every four months starting on the transactions' Start Payment Date.

- **Surcharge**

This value may be set by the merchant to automatically charge a consumer for processing Debit Cards.

T

- **Transaction ID (Response screen field)**

Displays the unique Converge record ID for the transaction.

- **Transaction Type (Response screen field)**

Displays the transaction type for the currently selected transaction.

U

- **User (Response screen field)**

Displays the user name of the person who submitted the transaction.