

ePay Advantage User Guide

ePay Advantage Version 6

April 2016 – Document Version 1.0



ePay Advantage
Integrated Bill Pay Portal

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1. Introduction

Nodus ePay Advantage (ePay) offers the latest online payment technology for enterprises to streamline online billing and payment collection. EPay Advantage offers real-time payment processing for both credit card and eCheck transactions while ensuring the highest standards of security are addressed. This document covers how to configure and utilize ePay Advantage's many features and functionality.

Please review the [Copyright](#) information [End User License Agreement](#) for more detailed information on the use of this document and ePay Advantage.

1.1. Product Support

For support related inquiries, contact Nodus Support for further assistance.

Methods	Address/Numbers
<i>E-mail</i>	support@nodus.com
<i>Website</i>	http://www.nodus.com
<i>Telephone</i>	(909) 482-4701 – Option 2 for Support
<i>Fax</i>	(909) 482-4705
<i>Mail</i>	Nodus Technologies, Inc. 2099 S. State College Suite 250 Anaheim, California 92806

1.2. Self Help Troubleshooting

Many common questions or troubleshooting steps can be found on the Nodus Website.

The page at the following link contains articles to help resolve many common questions and issues.

http://www.nodus.com/ePay_FAQs.html

1.3. Terms and Conventions

This section defines the following terms and conventions used in this user guide.

TERMS	DESCRIPTION
<i>Customer User</i>	The recipient of the goods or services from the company, Customer users typically would use the ePay website to pay their outstanding invoices and manage account information.
<i>CSR User (Customer Service Representative)</i>	Internal users and salespeople who utilize the ePay site to assist in managing customer payments and account information.
<i>Administrator User</i>	The user who has access to the ePay administrative portal to make configuration changes for the website.
<i>eCheck</i>	Transactions processed through the Automated Clearing House (ACH). Payments made through this method utilize the bank account and routing numbers for processing.
<i>Wallet</i>	The location where credit card and eCheck account information is accessible for processing on the ePay website. A Wallet Entry is a reference to a single credit card
<i>Processor</i>	A company appointed by the merchant to handle the processing of transactions to direct the funds to the merchant's bank
<i>Payment Gateway</i>	The service provider that directs online transactions to the processor for approval.
<i>Back Office ERP</i>	The accounting system that ePay Advantage integrates with
<i>Sitefiles</i>	The folder where the ePay website files reside. This folder is determined during the installation of the website. This folder may also be referred to as ~\Sitefiles when relating to a file path. The ~ symbol is a reference to the path prior to the ePay Sitefiles folder which will vary based on folder that ePay is installed in.
<i>Parent/Child Account</i>	Parent Accounts (also known as National Accounts, Corporate Accounts or Multi-Entity Accounts) are accounts that can manage over their associated children (or Subsidiary) accounts.

1.4. Security

1.4.1. PA-DSS Compliance

ePay Advantage meets all the security requirements for Payment Application - Data Security Standard (PA-DSS) to help merchants achieve PCI (Payment Card Industry) Compliance for credit card processing. This user's guide describes the features and functionality of ePay Advantage. The needed security measures to help the business achieve PCI compliancy with ePay Advantage are described in the **PA-DSS Implementation Guide for ePay Advantage**.

<http://www.nodus.com/documentation/ePay-PA-DSS-3.2-Implementation-Guide.pdf>

In order to become and remain PCI Compliant, it is strongly recommended that the PA-DSS Implementation Guide is carefully read and all the recommended best practices are followed.

1.4.2. Transaction Processing Options

To address different security needs for different organizations, ePay supports multiple options for the processing of transactions and credit card storage.

PayFabric® Option

The **PayFabric® Option** utilizes the Nodus Cloud Processing Solution, PayFabric®, to dramatically reduce the scope of PCI compliance by removing the credit card storage, the credit card transmission and potentially the credit card entry point from the merchant's environment. The PayFabric® Option moves all the credit card entry and processing to the PayFabric® cloud to relieve ePay and the merchant from any contact with the sensitive credit card number. This option supports multiple payment gateways and PayFabric® can easily be integrated with other applications to utilize the stored account information in the Payfabric® cloud across applications.



Tokenization Option

The **Tokenization option** utilizes a service from the PayPal PayFlowPro Payment Gateway account where the Payment Gateway will manage credit card numbers provide ePay with a token value to symbolize each credit card number. EPay will store the token instead of the credit card number for future processing. This option can help merchants reduce the scope of PCI Compliance since Credit Cards are no longer stored in the company databases. The Tokenization Option is available for companies using the PayPal PayFlowPro Payment Gateway when the account has been setup through Nodus. Please contact Nodus for assistance in setting up a PayPal PayFlowPro Payment Gateway account.

Encryption Option

The **Encryption Option** is where the credit card information is stored (in encrypted format) on local premise. With the Encryption option, ePay is bundled with Nodus Encryption, a service that encrypts

credit cards in a format that has been approved to meet PCI Data Security Standards. This method of credit card storage supports multiple Payment Gateways and Processors.

1.5. Modules

ePay Advantage is flexible in how it can support many different businesses with different needs. To best meet these needs, ePay can be installed with different modules enabled. Please contact Nodus Technologies if additional modules need to be purchased for the installed version of ePay

Online Bill Pay

The Online Bill Pay Module of ePay Advantage allows for both customer service representatives and customers to utilize ePay to view and pay their invoices from the ePay portal.

High-level overview of features:

- Ability to Pay Invoices through Credit Card or eCheck
- View Invoice and Payment History
- Customizable New Invoice and Past Due Invoice email notifications
- Ability to make prepayments and schedule payments for the future
- Express Pay: Allow the customer to make a quick payment without signing into the portal

AutoPay

The AutoPay Module allows users to create a contract to automatically make payments on a recurring basis.

High-level overview of features:

- Ability to create AutoPay contracts for both Customers and Customer Service Representatives
- Configure the contract start date, end date and frequency (daily, monthly, quarterly, etc...)
- Email Notifications for successful and failed payments
- Specify if the contract should pay based on a fixed amount, past due invoices, or outstanding invoices.
- Ability for users to view, cancel and reprocess failed payments
- Email Notification for when the credit card associated to the contract will soon expire

Recurring Billing

The Recurring Billing module allows for contracts to be configured to generate invoices or orders on a recurring basis.

High-level overview of features:

- Ability for Customer Service Representatives to create Recurring Billing Contracts
- Associate a credit card or eCheck to the contract to have the system automatically collect funds at the time of the invoice or order generation.
- Ability to specify processing frequency on the contract or on the individual items in the contract.

- API to allow for other applications to automatically create recurring contracts within ePay
- Email Notification for when the credit card associated to the contract will soon expire

Installment Payments

The Installment Payments module allows an invoice to be split into smaller payments to be paid on a recurring basis.

High-level overview of features:

- Ability for Customer Service Representatives to create Installment Payment contracts
- Configure the contract start date and process frequency (daily, weekly, monthly, quarterly, etc...)
- Ability to add an interest rate and view the detailed amortization table for the contract payments.
- Email Notifications for successful and failed payments
- Ability for users to view and reprocess failed payments
- Email Notification for when the credit card associated to the contract will soon expire

eSOP™ Advantage

The eSOP™ Advantage module allows for Customer Service Representatives to generate sales orders directly from the ePay portal.

- Allow for generation of sales orders from the ePay website to accessed from anywhere with an internet connection
- Support for any number of users without requiring any additional license
- Process credit card or eCheck transactions directly against sales orders and receive real time verification
- Create customer accounts directly from within the ePay portal

1.6. Installation

Instructions regarding how to install ePay Advantage and its required components are located in the **ePay Installation Guide**. This guide can be obtained from the link below:

<http://www.nodus.com/documentation/ePay-6-Installation-Guide.pdf>

1.7. New Features in ePay Advantage 6

For a list of new features please review the **ePay Advantage Release Notes**. This document can be obtained at the below link:

<http://www.nodus.com/documentation/ePay-6-Release-Notes.pdf>

2. Administrator Portal

The ePay administrator portal contains many different pages for managing the ePay website. To access the administrator portal, simply log into ePay as an administrator user. When the website is first deployed, the default credentials for the administrator user is as below.

- **User Name:** admin
- **Password:** password

If this is the first time logging into the administrative portal or the administrator user's password has expired, the user will be prompted to change their password upon login.

2.1. Configuration Checklist

The Configuration Checklist is an easy way for the administrator user to walk through each of the configuration pages and all of the configuration pages are addressed.

Navigate to each page by clicking the page link in the configuration checklist.

The screenshot shows two parts of the ePay administrator portal. On the left is the 'Configuration Checklist' page, which has the title 'Configuration Checklist' and a subtitle 'Guide for admin setting configuration.' Below the title is a list of configuration categories with checkboxes: 'Site Settings' (checked), 'Company Information' (checked), 'Transaction Processing Options' (checked), 'Content Management' (checked), 'Email Setup' (unchecked), 'Payment Scheduler Options' (unchecked), and 'Landing Page Options' (unchecked). On the right is the 'Site Settings' page, which has the title 'Site Settings' and a subtitle 'Global configuration settings for ePay website'. Below the title are four tabs: 'Company Information' (selected), 'Transaction Processing Options', 'Content Management', and 'Email Setup'. The 'Company Information' tab is active, showing the heading 'Company information to be display'.

Once the setting is configured and saved, it would be recommended to mark the checkbox associated with the page to note that the settings on this page is complete.

2.2. Settings

2.2.1. Site Settings

(Settings > Site Settings)

The Site Settings page is used for general settings across the ePay website. The tabs on this page can be used to navigate across the different groups of settings. The 'Save' button on this page should be used to apply any changes to the configuration

Company Information

The company information tab is used to enter the information relating to the company. This information is used on the invoice display and various e-mail templates.

Site Settings
Global configuration settings for ePay website

Company Information | Transaction Processing Options | Content Management | Email Setup | Payment Scheduler Options | Landing Page Options

Company information to be displayed on invoice/receipt header

Company Name:

Company Country:

Street:

Street2:

City:

State:

Zip:

Phone:

Upload Logo:

Populate the form on this page with information pertaining to the company.

The '**Upload Logo**' option can be used to replace the company logo to the top of the website. Use the browse button to navigate to the location of a graphic file and upload the company logo. Once the location is provided, click the 'Upload' button to add the logo.

When using this feature, the logo image file (Logo.gif) is saved under the ePay Sitefiles folder at ~Sitefiles\App_Themes\[Selected ePay Theme]\Images. The image will be resized to fit the 500x60 size for this image.

Tip: Advanced users can configure the logo further by utilizing the file located at ~Sitefiles\App_Themes\[Selected ePay Theme]\default.skin. By making changes to this file the logo is not restricted to be saved as a .gif file and the size is not restricted to 500x60.

The **Remove** option allows user to clear out the existing logo image.

Transaction Processing Options

The Transaction Processing Options tab is used to specify the settings for the connection to the secure payment gateway.

Site Settings

Global configuration settings for ePay website

Company Information
Transaction Processing Options
Content Management
Email Setup
Payment Scheduler Options
Landing Page Options

Options to enable/disable credit card/eCheck payment processing

PayFabric Hosted Page URL:	<input type="text" value="https://sandbox.payfabric.com/v2/web"/>		?
PayFabric API URL:	<input type="text" value="https://sandbox.payfabric.com/v2/rest/"/>	running	?
PayFabric Device ID:	<input type="text" value="00000000-0000-0000-0000-000000000000"/>		?
PayFabric Device Password:	<input type="password" value="*****"/>		?
Credit Card Setup ID:	<input type="text" value="PayFlowPro Test"/>		?
Credit Card Transaction Type:	<input type="text" value="Sale"/>		?
Accept Credit Cards:	<input checked="" type="checkbox"/>		?
eCheck Setup ID:	<input type="text" value="USAEpay eCheck"/>		?
Accept eCheck:	<input checked="" type="checkbox"/>		?

The below table contains information on the fields on this page.

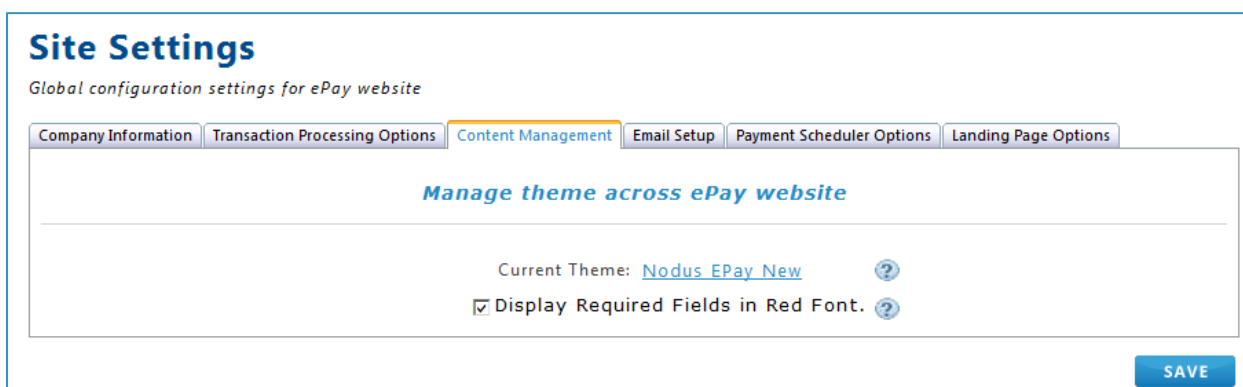
FIELD	DESCRIPTION
<i>Credit Card Setup ID</i>	Select the gateway account profile for connecting to the payment gateway for processing credit cards. The ePay Installation Guide contains more information in the 'Configuring the Payment Gateway Connection' section of the guide for adding values to this field.
<i>Credit Card Transaction Type</i>	Changes the transaction type for documents generated from eSOP™ Advantage. <ul style="list-style-type: none"> - The 'Sale' configuration will result in an immediate capture of funds from the credit card - The 'Book' configuration will result in an authorization being made against the credit card and the capture of funds will occur at a later time. <p style="color: #0070C0; font-style: italic; margin-top: 10px;">This option is only available with the <u>eSOP™ Advantage</u> module of ePay</p>

<i>Accept Credit Cards</i>	Activates the option to accept credit card payments.
<i>eCheck Setup ID</i>	Select the gateway account profile for connecting to the payment gateway for processing eChecks. The ePay Installation Guide contains more information in the 'Configuring the Payment Gateway Connection' section of the guide for adding values to this field.
<i>Accept eCheck</i>	Activates the option to accept eCheck payments.
Encryption and Tokenization related settings	
<i>Address Validation Enabled</i>	When activated, ePay verifies the billing address used during a credit card transaction. If the address verification fails, the transaction will not be approved.
<i>ZIP Validation enabled</i>	When activated, ePay verifies the Zip Code used by a credit card transaction. If the zip code verification fails, the transaction will not be approved.
<i>CVV2 Required</i>	The security code on the back of the credit card is required to be entered and will be validated when this option is chosen. This is only applicable for transactions processed in real time. (Not for scheduled or automatic payments)
Tokenization related settings	
<i>Use PayPal Hosted Payment Page</i>	If checked, the PayPal Hosted Payment Page will be utilized for all credit card point of entry on ePay which can reduce the scope of PCI compliancy for the company since credit card numbers would not be transmitted out of ePay. Additional configuration will be required on the PayPal PayFlow Pro Gateway Portal for this setting to function properly. Contact Nodus Technologies Support for more information regarding utilizing this option. If unchecked, ePay will utilize standard tokenization methods for processing transaction.
<i>PayPal Live Mode Enabled</i>	If the PayPal Hosted Payment Page is being used, this checkbox must be marked for processing live transactions. If this checkbox is unchecked, transactions will be in test mode.

Currency Code	This field is for the currency code if the PayPal Hosted Payment Page is enabled. Acceptable values: USD – US Dollar, CAD – Canadian Dollar
PayFabric® Related Settings	
PayFabric Web Address	For Test Transactions: https://sandbox.payfabric.com/v2/web/ For Live Transactions: https://www.payfabric.com/v2/web/
PayFabric Service Address	For Test Transactions: http://sandbox.payfabric.com/v2/rest/ For Live Transactions: http://www.payfabric.com/v2/rest/
PayFabric Device ID	Enter the Device Security Code (a unique identifier) associated with ePay Advantage (device) that can be obtained from the PayFabric portal. The ePay Installation Guide contains more information on how to generate a PayFabric Device ID on the PayFabric Portal in the 'Configure ePay Advantage' section
PayFabric Device Password	Enter the password associated with the PayFabric Device.

Content Management

The Content Management tab contains settings relating to the display of the website.



Enabling the 'Display Required Fields in Red Font' checkbox will make required fields on ePay forms shown in a red font.

The 'Current Theme' link will display a list of the available themes for the ePay website. Choosing an option in this list will change the current theme. Advanced users can modify the theme of the website to suit the company best.

To add a custom theme to the list of themes:

1. Navigate to the ~\Sitefiles\App_Themes folder for the ePay website
2. Copy one of the existing theme folders that is most similar to the desired theme for the company
3. Name the folder to help identify the new custom theme
4. Recycle the ePay Application Pool for ePay to be able to recognize the new theme
5. The new theme should be shown as an available option for selection when the 'Current Theme' link is selected.

To edit a theme on ePay:

1. Navigate to the ~\Sitefiles\App_Themes\[Desired Theme] folder for the ePay website
2. Edit the files such as the default.skin or default.css files within the theme folder to suit the company look and feel
3. If the currently selected theme is modified, the changes will show on the ePay website as the files are saved and the page is refreshed.

Email Setup

The Email Setup tab is used for configuring the global settings for ePay to connect to the company e-mail server for sending various e-mails.

Site Settings

Global configuration settings for ePay website

Company Information
Transaction Processing Options
Content Management
Email Setup
Payment Scheduler Options
Landing Page Options

Configure settings for email notifications

SMTP Server Address:	<input type="text" value="smtp.nodus.com"/>	?
SMTP Server Login:	<input type="text" value="ePay@nodus.com"/>	?
SMTP Server Password:	<input type="password" value="*****"/>	?
Enable SSL:	<input checked="" type="checkbox"/>	?
SMTP Server Port:	<input type="text" value="25"/>	?
Allow Email Notification:	<input checked="" type="checkbox"/>	?
Test Mode:	<input checked="" type="checkbox"/>	?
Test Mode Domain:	<input type="text" value="nodus.com"/>	?
Test Email From:	<input type="text" value="ePay@nodus.com"/>	?
Test Email Address:	<input type="text" value="ePay@nodus.com"/>	?

The following table contains descriptions of how to use the various fields on this page.

FIELD	DESCRIPTION
<i>SMTP Server Address</i>	Provide the address for ePay to connect to the company mail server
<i>SMTP Server Login</i>	If the mail server requires a login to be able to send e-mail, provide the login name
<i>SMTP Server Password</i>	Provide the password associated to the SMTP Server Login if necessary
<i>Enable SSL</i>	If a secure connection using SSL is required to access the mail server, mark this checkbox. Otherwise leave unchecked
<i>SMTP Server Port</i>	Provide the port required to connect to the mail server. Port 25 is often used for mail server communication.
<i>Allow Email Notification</i>	If this checkbox is unmarked, ePay will be unable to send e-mails. Marking this checkbox allows ePay to send e-mails but the individual e-mail templates will need to be enabled or disabled

Test Mode	Enabling this option will configure ePay to only send e-mails to addresses that end with the value from the 'Test Mode Domain' field
Test Mode Domain	When 'Test Mode' is enabled, ePay can only send e-mails to addresses that end with the value provided in this field.
Test Email From/To	To test the mail server settings are correct, provide the 'From' and 'To' email addresses for testing. When these values are populated, use the 'Send Test Email' button to test the e-mail settings are correct.

Payment Scheduler Options

There are various automated tasks that ePay performs such as processing scheduled payments and automated payment reminders. The settings in this section control some of the behaviors for the scheduled events.

Site Settings

Global configuration settings for ePay website

Company Information
Transaction Processing Options
Content Management
Email Setup
Payment Scheduler Options
Landing Page Options

Configure settings for payment processing schedule

Enable Scheduled Events

		ENABLE	LOG ACTIVITY
Document Queue	?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Past Due Reminder	?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Scheduled Payment	?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Credit Card Expiration Warning	?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Installment Contract Payment	?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Recurring Invoice Contract	?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
AutoPay Contract	?	<input checked="" type="checkbox"/>	<input type="checkbox"/>

ePay Scheduler Worker(s):

Stop Processing Payment after attempts ?

Re-Process Payment after minutes ?

Scheduler Interval: seconds ?

Reduce scheduled payment Amount for Overpayment: ?

A 'Start' or 'Stop' button is presented at the top of the page that can be used to start or stop all scheduled events on the site.

The 'ePay Scheduler Worker(s)' table contains each of the individual scheduled tasks available for ePay. The checkbox in the 'Enable' column can be marked to enable the scheduled task. The checkbox in the 'Log Activity' column will log the tasks the scheduler is making regularly. The log will be placed into the ePay Sitefiles folder. Please take caution in leaving the log running for an extended period of time. The following is a description of each of the scheduler workers and the remaining fields on this page.

FIELD	DESCRIPTION
<i>Document Queue</i>	This scheduler worker will control the automatic resubmission of documents to the back office ERP
<i>Past Due Reminder</i>	This scheduler worker will control the automatic past due reminder to be sent to customer users <i>This option is only available with the Online Bill Pay module of ePay</i>
<i>Scheduled Payment</i>	This scheduler worker is used to enable the automatic processing of scheduled payments from the AutoPay contracts, the Installment contracts, or payments scheduled using the 'Pay Later' Feature.
<i>Credit Card Expiration Warning</i>	This scheduler worker is used to enable the automatic warning for credit cards that will be expiring in the future.
<i>Installment Contract Payment</i>	This scheduler worker is for enabling that scheduled payments for installment contracts to be processed on a regular basis. <i>This option is only available with the Installment Payments module of ePay</i>
<i>Recurring Invoice Contract</i>	This schedule worker manages that the Recurring Billing contracts run their cycle on a regular basis. <i>This option is only available with the Recurring Billing module of ePay</i>
<i>AutoPay Contract</i>	This schedule worker manages that the AutoPay contracts run their cycle on a regular basis. <i>This option is only available with the AutoPay module of ePay</i>

<i>Stop Processing Payment after _ attempts</i>	The number provided here will be the number of attempts ePay will make against a scheduled transaction if the transaction were to fail.
<i>Re-Process Payment after _ minutes</i>	When a payment is declined or unable to be processed, the user can set the time gap (in minutes) between attempts before the scheduler reprocesses the failed payment transaction.
<i>Scheduler Interval</i>	This value determines how often the scheduler checks for tasks to perform. It is not recommended to reduce this value below 10 seconds
<i>Reduce Scheduled Payment Amount for Overpayment</i>	When this option is enabled, if an overpayment on an invoice is detected for a scheduled payment, the payment amount will be reduced to match the current balance due on the invoice. If all the applied invoices are fully paid, the payment will be cancelled. With this option disabled, an overpayment will be processed without modification to the invoice amount and the document will need to typically be managed in the document queue.

Landing Page Options

The options in the 'Landing Page Options' tab provides the ability to select first page that would be show to CSR and Customer users on ePay Advantage after the user logs in. There is a separate option for the CSR user Default Landing Page and the Customer user Default Landing Page.

Site Settings

Global configuration settings for ePay website

Company Information
Transaction Processing Options
Content Management
Email Setup
Payment Scheduler Options
Landing Page Options

Select landing pages for both CSR and customers

CSR Default Landing Page: Outstanding Invoices ?

Customer Default Landing Page: Outstanding Invoices ?

SAVE

2.2.2. Back Office Settings

(Settings > Back Office Settings)

The 'Back Office Settings' page is for settings related to the integration to the back office ERP application.

Back Office

The '**Back Office**' tab is related to settings for the connection to the back office.

Back Office Settings

Configuration settings for integration between ePay & Back Office

Back Office
Customer Options
Payment Options
Card Name Mapping

Setup integration settings for ePay

Client ID: client_1nclvLi7j4xvYtY+Mcm

Secret: J5Faz0080MOcjtzf9zMEY1VAMdoWbE50IXci21i1HqzFQGAoeg

Back Office Connection: http://localhost/TransactService_3.0/TransactService.asmx

Store ID: 9fb30099-0376-4210-8869-172856738bfc

Functional Currency: Z-US\$ [Import Functional Currency](#)

Submit Documents to Back Office in Real Time

?

RESET ?

?

RESET ?

?

?

SAVE

FIELD	DESCRIPTION
<i>Client ID</i>	This is the identifier for the ePay website required for use of an application utilizing ePay's RESTful API
<i>Secret</i>	This is the second identifier for the ePay website required for use of an application utilizing ePay's RESTful API. The 'Reset' button can be used to reconfigure this value if there is a reason for this to be changed.
<i>Back Office Connection</i>	This is for the connection URL required for ePay to connect to the web service on the back office application server.
<i>Store ID</i>	This is the identifier for the ePay website utilized for access to ePay from other applications. The 'Reset' button can be used to set this value to the original default value so it can be reconfigured.
<i>Functional Currency</i>	The Functional Currency is shown here The 'Import Functional Currency' link can be used to import the existing functional currency into ePay from the Back Office ERP.

<p><i>Submit Documents to Back Office in Real Time</i></p>	<p>Leave this checkbox marked to allow transactions to be submitted to the back office in real-time.</p> <p>If unchecked, documents will be sent to the back office by the scheduler service.</p>
--	---

Customer Options

The '**Customer Options**' tab is for configuration related to the customer user.

Back Office Settings

Configuration settings for integration between ePay & Back Office

Back Office
Customer Options
Payment Options
Card Name Mapping

Site settings for ePay customer

Customer Prefix:

Customer Number Length: *[including prefix]*

Allow Customer Registration:

Require E-mail for Requesting Activation code:

Allow back office e-mail updates after registration:

Enable Automatic Customer Registration e-mail:

?

?

?

?

?

?

SAVE

FIELD	DESCRIPTION
<i>Customer Prefix</i>	<p>Use this field to determine the prefix used for the customer identifier when a new customer is created from eSOP Advantage</p> <p><i>This option is only available with the eSOP™ Advantage module of ePay</i></p>
<i>Customer Number Length</i>	<p>Use this field to determine the length of the customer identifier when a new customer record is created from eSOP™ Advantage</p> <p><i>This option is only available with the eSOP™ Advantage module of ePay</i></p>
<i>Allow Customer Registration</i>	<p>Enabling this checkbox allows the customer to utilize the self-registration features of ePay Advantage. With this option unchecked, the 'Register' button will no longer appear on the ePay Login page.</p>

<p><i>Require E-Mail for Requesting Activation Code</i></p>	<p>A new customer can request for an activation code to self-register for the ePay website.</p> <p>If this option is checked, customer is required to provide both their assigned e-mail address and their customer account identifier to obtain the activation code. If this option is unchecked, the customer is only required to provide their customer account identifier to receive their activation code.</p>
<p><i>Allow back office e-mail updates after registration</i></p>	<p>Enabling this option will allow updates to the e-mail address from the back office ERP to update the primary account e-mail address in ePay after the primary account has already been registered. Disabling this option will lock the user's email address after they have registered. Enabling this option is ideal for systems using single sign-on integration where the user does not configure their email address from the user portal.</p>
<p><i>Enable Automatic Customer Registration e-mail</i></p>	<p>Enabling this option will allow for the Customer Registration e-mail to be sent automatically for either a new customer or a customer who did not previously have an e-mail address associated to their account is provided an e-mail address.</p>

Payment Options

The **'Payment Options'** tab allows for the configuration of how the payment identifiers will be assigned.

Back Office Settings

Configuration settings for integration between ePay & Back Office

Back Office
Customer Options
Payment Options
Card Name Mapping

Setup payment & finance charge document types

Payment Prefix:	<input type="text" value="WEBPMT"/>	?
Payment Number Length:	<input type="text" value="16"/>	?
Payment Batch Prefix:	<input type="text" value="EPAY"/>	?
Finance Charge Prefix:	<input type="text" value="FCEPAY"/>	?
Unapplied Interest Batch Prefix:	<input type="text" value="UNAPP"/>	?

SAVE

FIELD	DESCRIPTION
<i>Payment Prefix</i>	The value in this field will be used as the prefix for the payment identifier.
<i>Payment Number Length</i>	Use this field to determine the character length for the payment identifier. The number of characters in the 'Payment Prefix' will be included when calculating the payment number length.
<i>Payment Batch Prefix</i>	<p>Allows the user to enter a unique prefix to identify the payment batch</p> <p>The payment batch name used for ePay payments will be the payment batch prefix + the current date in an YYYYMMDD format. For example EPAY20151216</p>
<i>Finance Charge Prefix</i>	<p>The value in this field will be used to determine the prefix for Finance Charges generated from ePay.</p> <p><i>This option is only available with the Installment Payments module of ePay</i></p>
<i>Unapplied Interest Batch Prefix</i>	<p>The value in this field will be used to determine the batch name for the finance charges generated from ePay.</p> <p>The batch name used for finance charges will be the unapplied interest batch prefix + the current date in an YYYYMMDD format. For example EPAY20151216</p> <p><i>This option is only available with the Installment Payments module of ePay</i></p>

Card Name Mapping

The options in this tab are for setting the name for the specific payment card type or method that would be used during integration to the back office ERP. If a certain card type is expected to be used on the website, an associated mapping value should be added on this tab.

Back Office Settings

Configuration settings for integration between ePay & Back Office

[Back Office](#) | [Customer Options](#) | [Payment Options](#) | [Card Name Mapping](#)

Assign Back Office card names to ePay's supported card types

Visa	<input type="text" value="VISA"/>
MasterCard	<input type="text" value="MC"/>
American Express	<input type="text" value="AMEX"/>
Discover	<input type="text" value="DISC"/>
Diners Club	<input type="text" value="DINERS"/>
JCB	<input type="text" value="JCB"/>
ECheck	<input type="text" value="ECheck"/>

[SAVE](#)

2.2.3. Feature Settings

(Settings > Feature Settings)

Payment

This option is only available with the [Online Bill Pay](#) module of ePay

This page contains configuration options related to payment features. These configuration options are global options and once they are enabled, the settings will apply to all ePay users (both CSR & Customers).

Feature Settings

Configuration settings for ePay's Features

[Payment](#) | [Customer Wallet](#) | [Past Due Invoices Reminder Options](#) | [CAPTCHA](#) | [Grid Column Options](#)

Setup payment options for ePay site

<input checked="" type="checkbox"/> Allow Partial Payment	?
<input checked="" type="checkbox"/> Allow Prepayment	?
<input checked="" type="checkbox"/> Allow Pay Later	?
<input checked="" type="checkbox"/> Allow Apply AR Documents	?
<input checked="" type="checkbox"/> Allow Term Discount	?

[SAVE](#)

OPTIONS	DESCRIPTION
---------	-------------

Allow partial payment	Permits a partial payment amount against an outstanding invoice.
Allow deposit payment	Enabling this feature allows the user to make a prepayment from ePay that would not be applied to any invoices
Allow Pay Later	Enabling this feature allows the user to schedule a payment for a future date.
Allow Apply AR Documents	Enabling this feature will enable users to apply any existing credits/payments/returns (if available on their account) to outstanding invoice(s).
Allow Term Discount	<p>Enabling this feature will enable ePay to support Term Discount (if applicable).</p> <p>Once enabled, term discount related information such as Discount Available, Discount Date, and Discount Taken will be available to users on Outstanding Invoices page.</p>

Customer Wallet

This tab contains options relating to the customer’s wallet.

Feature Settings

Configuration settings for ePay's Features

Payment
Customer Wallet
Past Due Invoices Reminder Options
CAPTCHA
Grid Column Options

Setup wallet option on ePay site

Validate on New Wallet Entry ?

Credit Card Expiration Warning

Automatic Credit Card Expiration Warning ?

Credit Card Expiration Warning:

1 2 3 4 5 6 7 8
 9 10 11 12 13 14 15 16
 17 18 19 20 21 22 23 24
 25 26 27 28 29 30 31 Last ?

Months Prior to Expiration: ?

Send for Credit Cards on Contracts Only ?

SAVE

OPTIONS	DESCRIPTION
<i>Validate on new Wallet Entry</i>	<p>This option is to ensure the credit card information entered by user is valid prior to save the information into ePay database.</p> <p>If enabled (checked), a transaction of type "Authorization" will be processed for a small amount (typically \$0.01) against the customer's account when a new Wallet entry is added. No money will actually be taken out of the customer's account.</p> <p>IMPORTANT: Please be aware that a Payment Gateway transaction fee may be associated with this transaction.</p>
<i>Allow Remove Primary Wallet</i>	<p>If checked, user is able to delete/remove primary/default wallet entry.</p>
<i>Credit Card Expiration Warning</i>	<p>The option 'Automatic Credit Card Expiration' can be enabled to allow for an email notification to be sent automatically for expired credit card(s).</p> <p>Once enabled, dates should be selected to determine the day or days the system will send out the Credit Card Expiration Warning email.</p> <p>Select the number of months prior to expiration for the system to remind users of their expiring credit cards.</p> <p>The option 'Send for Credit Cards on Contracts only' is to notify users with existing (inactive and active) Recurring Billing, AutoPay or Installment contracts with expired cards.</p>

Past Due Invoices Reminder Options

This option is only available with the [Online Bill Pay](#) module of ePay

This option enables the ability to automatically have the [Past Due Invoices Reminder](#) email sent to customer accounts. The features on this page can be used to specify when the payment reminders are to be sent.

Feature Settings

Configuration settings for ePay's Features

Payment
Customer Wallet
Past Due Invoices Reminder Options
CAPTCHA
Grid Column Options

Setup email reminder for past due invoice(s) on ePay site

Enable Payment Reminders ?

Weekly. On Every:

Sunday
 Monday
 Tuesday
 Wednesday
 Thursday
 Friday
 Saturday

Monthly. On Every:

1
 2
 3
 4
 5
 6
 7
 8
 9
 10
 11
 12
 13
 14
 15
 16
 17
 18
 19
 20
 21
 22
 23
 24
 25
 26
 27
 28
 29
 30
 31
 Last

SAVE

To utilize this feature:

1. Check/uncheck the **Enable Payment Reminders** box to enable/disable the feature.
2. Select the **Weekly** or **Monthly** option.
3. For **Weekly**, select the preferred day(s) to send out the payment reminder
4. For **Monthly**, select the preferred date(s) to send out the payment reminder
5. Click the **Save** button at the bottom of the page

CAPTCHA

This option gives an extra security feature for ePay site. It enables the tool to verify whether an actual human user or computer bot is using the site in order to block internet spam programs. ePay utilizes Google reCAPTCHA, to protect forced entry from an automated system.

Feature Settings

Configuration settings for ePay's Features

Payment
Customer Wallet
Past Due Invoices Reminder Options
CAPTCHA
Grid Column Options

Setup CAPTCHA security on ePay site

Enable/Disable CAPTCHA in different sections

Enable CAPTCHA for User Login ?

Enable CAPTCHA for User Registration ?

Enable CAPTCHA for Forgot Password ?

Need a key? [Sign up for free](#) ?

ReCaptcha Public Key ?

ReCaptcha Private Key ?

ReCaptcha Theme red ?

Tester ?

REFRESH

SAVE

To register for reCAPTCHA browsing to the below link and gather both the public and private keys:

<http://www.google.com/recaptcha>

- ReCaptcha Public Key
- ReCaptcha Private Key

OPTIONS	DESCRIPTION
<i>Enable CAPTCHA for user login</i>	If enabled, the CAPTCHA box will be displayed on the user login page.
<i>Enable CAPTCHA for user registration</i>	If enabled, the CAPTCHA box will be displayed on the account activation page.
<i>Enable CAPTCHA for Forgot Username</i>	If enabled, the CAPTCHA box will displayed for the Forgot Username page
<i>Enable CAPTCHA for Forgot Password</i>	If enabled, CAPTCHA is enabled for the Forgot Password page
<i>Sign up for free</i>	Click on the link to be routed to Google reCAPTCHA account registration.
<i>reCAPTCHA Public Key</i>	Populate the public key provided from Google reCAPTCHA account

reCAPTCHA Private Key	Populate the private key provided from Google reCAPTCHA account
reCAPTCHA Theme	The preferred theme or layout for reCAPTCHA from the drop-down list.
Tester	After the reCAPTCHA public and private keys are entered, clicking the Refresh button will validate the keys.

Grid Column Options

This option is only available with the [Online Bill Pay](#) module of ePay

This tab provides options to show or hide certain columns from the tables on ePay. Marking the box in the 'Hide' column will hide the associated column from being displayed on the associated page for CSR and Customer users.

Feature Settings

Configuration settings for ePay's Features

Payment
Customer Wallet
Past Due Invoices Reminder Options
CAPTCHA
Grid Column Options
Security

Options to hide columns on ePay

Outstanding Invoices	Hide
Customer PO#	<input type="checkbox"/> ?
Discount Taken	<input type="checkbox"/> ?
Paid Transactions	Hide
Customer PO#	<input type="checkbox"/> ?
Source	<input type="checkbox"/> ?
Last Payment Date	<input type="checkbox"/> ?

SAVE

OPTIONS	DESCRIPTION
Customer PO#	Show/hide the Purchase Order Number associated to the invoice.
Discount Taken	Show/hide the Discount Amount Applied against the Invoice Document if term discount is applicable. This column would only be shown if the 'Allow Terms

	Discount' option is enabled in the 'Payment' tab of the 'Feature Settings' page.
Source	Show/hide the source of where the document was created
Last Payment Date	Show/hide the this represents the date of the last processed payment associated to the invoice

Security

This options in this tab provide the ability to control the security policies for the username and password on ePay.

Feature Settings

Configuration settings for ePay's Features

Payment
Customer Wallet
Past Due Invoices Reminder Options
CAPTCHA
Grid Column Options
Security
Invoice PDF Settings

Setup user password policy

Passwords will expire in days ?

Prevent previous passwords from being used ?

Enable Restriction for Customer User

Password rules and restrictions

Minimum length: ?

Maximum length: ?

Error Message:

Password must be between 7 and 20 characters starting with a letter and containing only letters and numbers

?

Start with a letter ?

Support special characters ?

Username rules and restrictions

Minimum length: ?

Maximum length: ?

Error Message:

Username must be between 6 and 20 characters starting with a letter and containing only letters and numbers

?

Start with a letter ?

Support special characters ?

OPTIONS	DESCRIPTION
---------	-------------

<i>Passwords will expired in</i>	Enforce password expiration across all ePay users. This field only accepts whole number values from 0 to 365. The PCI Requirement is that this value is set to 90 days or less
<i>Prevent previous___ passwords from being used</i>	Enforce that previous passwords cannot be used when setting a new password. The PCI Requirement is that this value would be 4 or higher.
<i>Enable Restriction for Customer user</i>	Enabling this option will allow the password expiration settings to apply to customer users. When this option is unmarked, the password expiration settings will only apply to CSR and Admin users.
Password And Username Rules And Restrictions	
<i>Minimum Length</i>	Minimum length for password or username.
<i>Maximum Length</i>	Maximum character length for password or username.
<i>Error Message</i>	Set the warning message for a password or user name that does not meet the security policy.
<i>Start with letter</i>	If checked, username or password must start with a letter
<i>Support the special character</i>	If checked, special characters such as symbols will be allowed for the username or password

Additional Fee

This option is only available with the [Online Bill Pay](#) and [AutoPay](#) modules of ePay

The options in this tab allow the user to configure an additional fee that can be included during payment from the Online Bill Pay and AutoPay portions of ePay. The settings in this tab function in the same manner for the different ePay modules but can be configured separately.

Feature Settings

Configuration settings for ePay's Features

Payment
Customer Wallet
Past Due Invoices Reminder Options
CAPTCHA
Grid Column Options
Security
Additional Fee
Invoice PDF Settings

Configure Settings for an Additional Fee

Online Bill Pay

Enable for Credit Card Transactions: ?

Enable for eCheck Transactions: ?

Additional Fee Type: Percentage ? ?

Additional Fee Debit Memo Prefix: ?

Hide Additional Fee Debit Memo: ?

Additional Fee Batch Prefix: ?

Additional Fee Name: ?

Additional Fee Message: ?

SAVE

Option	Description
<i>Enable for Credit Card Transactions</i>	Enabling this option will apply the additional fee to the payment where Credit Card is selected as the payment method. ** Please review with the business' merchant account provider for the necessary considerations to make before adding an additional fee for credit card transactions.
<i>Enable for eCheck Transactions</i>	Enabling this option will apply the additional fee to the payment where eCheck is selected as the payment method
<i>Additional Fee Type</i>	This option lets the additional fee be configured as a percentage or a fixed amount. The value to the right of the dropdown is to be used to configure the percentage or additional amount
<i>Additional Fee Debit Memo Prefix</i>	The value here will be the prefix of the document number that is assigned to the Debit Memo that is created to balance out the account for the Additional Fee amount
<i>Hide Additional Fee Debit Memo</i>	Enabling this option will hide the Debit Memo for the Additional fee on ePay pages such as the Invoice History and the Outstanding Invoices page.
<i>Additional Fee Batch Prefix</i>	This option is used to configure the batch prefix that will be used during the integration of the Additional Fee Debit Memo to the back office ERP

<i>Additional Fee Name</i>	This value will be the presented name for the Additional Fee on ePay's pages.
<i>Additional Fee Message</i>	This value will be the presented message to explain the meaning for additional fee when the user is making a payment or configuring an AutoPay contract

Invoice PDF Settings

This option is only available with the [Online Bill Pay](#) module of ePay

The options in this tab allow ePay to utilize a saved .PDF file for the display of the invoices on ePay's pages rather than using the standard invoice display that comes with ePay.

Feature Settings

Configuration settings for ePay's Features

Payment
Customer Wallet
Past Due Invoices Reminder Options
CAPTCHA
Grid Column Options
Security
Additional Fee
Invoice PDF Settings

Use PDF documents for invoices :

Invoice Folder Path: ?

Invoice File Format: .pdf ?

Available Variables

Invoice Number:	[[[InvNum]]]
Document Year in YY format:	[[[YY]]]
Document Month in MM format:	[[[MM]]]
Document Day in DD format:	[[[DD]]]
Back Office Customer Number:	[[[CustNum]]]
Identity:	[[[Identity]]]

Provide required variables for testing :

Invoice Number:	<input type="text"/>	Year :	<input type="text"/>	
Customer Number :	<input type="text"/>	Month :	<input type="text"/>	
Identity:	<input type="text"/>	Day :	<input type="text"/>	Search for Invoice

If Invoice pdf is not found :

Show Standard Invoice Display ?

Show Error Message ?

We are sorry for the inconvenience, but your invoice details cannot be shown at this time. Please contact(555) 555-5555 if you need to see your invoice. Thank you.

SAVE

OPTIONS	DESCRIPTION
<i>Use PDF documents for invoices</i>	With this checkbox enabled, ePay will search for a .PDF document when displaying the invoice to the user rather than using ePay's standard invoice display.
<i>Invoice Folder Path</i>	The folder path for the invoice to be searched should be added to this field. Variables can be added to the folder path if the invoices are in separate folders. Different path types are supported as below. Examples:

	<p>Invoices placed in a local folder: C:\Invoices\ Invoices placed in the ePay Sitefiles folder: ~/Invoices/ Invoices on an open web location: http://InvoiceServer/Invoices/ Invoices on a different server: \\InvoiceServer\Invoices\ *To browse the folder on a separate server, anonymous access must be allowed from the web server.</p>
<i>Invoice File Format</i>	The file name for the invoice to be searched. The available variables can be used for different file formats
<i>Provide Required Variables for Testing</i>	This section can be used to test the 'Invoice Folder Path' and the 'Invoice File Format' are functional. Populate the required variables and click the 'Search for Invoice' to see that the .PDF file can be found.
<i>If the Invoice pdf is not found</i>	<p>The settings here will be used if the .PDF file cannot be located for any reason, it could be due to the invoice not being in the folder or a connection issue to the folder path.</p> <p>If 'Show Standard Invoice Display' is on, then ePay's standard invoice display would be used in this scenario to show the user the invoice details.</p> <p>If 'Show Error Message' is on, then the configurable message below will be shown to the user.</p>

2.2.4. Recurring Billing Settings

(Settings > Recurring Billing Settings)

Recurring Invoice

This option is only available with the [Recurring Billing](#) module of ePay

The following table describes the available configuration options for Recurring Billing.

FIELD	DESCRIPTION
<i>Contract Number prefix</i>	The prefix for the ePay Contract Number
<i>Contract Number Length</i>	The number of digits used in the contract number. The maximum number allowed is 16.

<i>Invoice Number Prefix</i>	The prefix for invoice documents generated from the recurring billing.
<i>Invoice Number Length</i>	The number of digits used in the invoice number. The maximum number allowed is 16.
<i>Invoice Back Office Document Type</i>	The document type for invoice documents created by the recurring billing module. For Dynamics GP integration to be successful, the specified document type must already exist in Dynamics GP
<i>Order Number Prefix</i>	The prefix for order documents generated from the recurring billing.
<i>Order Number Length</i>	The number of digits used in the order number. The maximum number allowed is 16.
<i>Order Back Office Document Type</i>	The document type for order documents created by the recurring billing module. For Dynamics GP integration to be successful, the specified document type must already exist in Dynamics GP
<i>Default Site ID</i>	The specified site ID will be the default site ID on the RB Contract header for New Invoice Contract form.
<i>Markdown Type</i>	The type of markdown on the Recurring Billing Contract. The following options are available: <ul style="list-style-type: none"> • Amount – Fixed amount off of the unit price • Percentage – Percentage off of the unit price
<i>Reactivate On-hold Contract</i>	If checked, this option will provide the preferred method of handling the missing billing cycle during the on-hold period. There are two options available: <ol style="list-style-type: none"> 1. Skip the missing billing cycles 2. Reprocess the missing billing cycles
<i>Use Current Item Price</i>	If checked, the contract item price will be calculated based on the current item price imported from Dynamics GP. If unchecked, the contract item price is always the contracted original price.
<i>Generates Invoices if Payment Failed</i>	If checked, documents with failed payment transactions (declined by the gateway) will post to GP without a payment.

	If unchecked, the document will not be generated if a failed payment is processed. The error message can be viewed and reprocessed from contract view.
<i>Required Contract Class ID for RB Contract</i>	If unchecked, the contract class ID is not a required field and does not need to be populated before a user can save the Recurring Invoice contract. If checked, the contract class ID is a required field and needs to be populated before a user can save the Recurring Invoice contract.

Recurring Billing Settings

Configuration settings for Recurring Billing module

Recurring Invoice
AutoPay

Setup Recurring Billing contract, invoice/order document types

Contract Number Prefix:	<input type="text" value="RB"/>	?
Contract Number Length:	<input type="text" value="15"/>	?
Invoice Number Prefix:	<input type="text" value="RBINV"/>	?
Invoice Number Length:	<input type="text" value="15"/>	?
Invoice Back Office Document Type:	<input type="text" value="RBINV"/>	?
Order Number Prefix:	<input type="text" value="RBORD"/>	?
Order Number Length:	<input type="text" value="15"/>	?
Order Back Office Document Type:	<input type="text" value="RBORD"/>	?
Default Site ID:	<input type="text" value="WAREHOUSE"/>	?
Markdown Type	<input type="text" value="Amount"/>	?
<input type="checkbox"/> Reactivate on-hold RB contracts when on-hold customers is reactivated	<input type="text" value="Skip previous missing billing cycle(s)"/>	?
Use Current Item Price:	<input type="checkbox"/>	?
Generates Invoices If Payment Failed:	<input type="checkbox"/>	?
Required Contract Class ID for RB Contract:	<input type="checkbox"/>	?

SAVE

AutoPay

This option is only available with the [AutoPay](#) module of ePay

The settings in the AutoPay Tab relate to the AutoPay module of ePay.

Recurring Billing Settings

Configuration settings for Recurring Billing module

Recurring Invoice | **AutoPay**

Setup AutoPay contract and applying rules

Contract Number Prefix:

Contract Number Length:

Payment Applying Rule:

Fixed Amount

Only process if there is an outstanding balance

Allowed Payment Amount Options: Based on Invoice Due Date

Based on Invoice Document Date

Based on All Outstanding Invoices

SAVE

FIELD	DESCRIPTION
Contract Number Prefix	This value is used to specify the prefix for the AutoPay Contract Identifier.
Contract Number Length	This value is used to specify the length of the AutoPay Contract Identifier. The maximum value is 16.
Payment Applying Rule	<p>When a fixed amount payment is received, this setting establishes how payment can automatically be applied to the customer's outstanding invoices</p> <ul style="list-style-type: none"> • Unapplied – the generated payments will not be applied to any invoices • OldestFirst – The generated payments will be applied to the oldest invoices first. • LatestFirst – the generated payments will be applied to the latest invoices first. • SmallestAmountFirst – the generated payments will be applied to invoices with the smallest amount first • LargestAmountFirst – the generate payments will be applied to invoices with the largest amount first
Allowed Payment Amount Options	Marking options in this section will allow certain payment options to be available for use when an AutoPay contract is created. One an option is selected, it can only be removed if all associated AutoPay contracts with this option selected are closed.

<i>Fixed Amount</i>	The AutoPay contract will generate payments passed on a Fixed Amount for each cycle
<i>Only Process if there is an Outstanding Balance</i>	For AutoPay Contracts with the 'Fixed Amount' option selected, if this option is enabled, a payment will only be generated for the AutoPay Contract if the customer has an outstanding invoice. If unchecked, AutoPay processes the fixed amount even when there are no available outstanding invoices for this customer.
<i>Based on Invoice Due Date</i>	If this option is selected for the AutoPay Contract, during each contract cycle, a payment will be generated for the total of the balance of the outstanding invoices that have a due date that is less than or equal to the current date.
<i>Based on Invoice Document Date</i>	If this option is selected for the AutoPay Contract, during each contract cycle, a payment will be generated for the total of the balance of the outstanding invoices that have a document created date that is less than or equal to the current date.
<i>Based on All Outstanding Invoices</i>	If this option is selected for the AutoPay Contract, during each contract cycle, a payment will be generated for the total of the balance of all the outstanding invoices.

2.2.5. Installment Payment Settings

(Settings > Installment Payment Settings)

This option is only available with the [Installment Payments](#) module of ePay

The **Allow CSR to select Setup ID** option permits a different Setup ID to be chosen for specific installment payment contracts. If the option is unchecked, then CSR user will not be able to pick a Setup ID during installment contract creation and update.

2.2.6. Sales Order Entry Settings

(Settings > Sales Order Settings)

This option is only available with the [eSOPT™ Advantage](#) module of ePay

eSOPT™ (web-based Sales Order Entry) module enables company to generate invoice and order document for their customer(s) from the web. The created invoice/order document will be seamlessly integrated into Microsoft Dynamics GP without any further user intervention.

Enable the settings according to the information on the accompanying table. To make changes permanent, click the **Save** button at the bottom of the **Sales Order Settings** page.

Sales Order Entry Settings









FIELD	DESCRIPTION
<i>Default Site ID</i>	<p>The default site ID information can be entered here. Once populated, the eSOP form will always have this site ID as a default value when the form loads.</p> <p>If no changes made, this is the warehouse site where inventory item will be allocated from.</p>
<i>Filter Items by Site ID</i>	<p>This option allows items in product lookup list to be filtered according to the selected Site ID.</p> <p>If unchecked, product lookup list will display all items that have been imported from Dynamics GP.</p>
<i>Batch Prefix</i>	<p>Allows entry of a prefix identifier for Sales batches for all generated eSOP documents.</p>
<i>Submit Newly Created Customer to Back Office</i>	<p>With this option, newly created customer information is either sent directly to GP right after creation or the customer data is sent together when the first order document is created and submitted to Dynamics GP.</p>
<i>Default Document Type</i>	<p>An initial document type on the eSOP form, such as an invoice or order, is loaded when a user logs into ePay.</p>
<i>Show Cost</i>	<p>Displays the cost (determined by the cost type) for a line item on the sales order form.</p>
<i>Show Cost Type</i>	<p>This setting establishes the cost type for an item as available in Dynamics GP. There are two options:</p> <ul style="list-style-type: none"> • Current – current cost value of the item in GP • Standard – standard cost value of the item in GP
<i>Default Class ID</i>	<p>Sets the GP class ID for new customers created in the sales order entry area.</p>

Sales Order Entry Settings

Configuration settings for Sales Order Entry module

Sales Order Entry Settings **Order** Invoice

Setup Sales Order Entry options for ePay

Default Site ID:	<input type="text" value="WAREHOUSE"/>	
Filter Items By Site ID:	<input checked="" type="checkbox"/>	
Batch Prefix:	<input type="text" value="EPAY"/>	
Submit Newly Created Customer to Back Office:	<input type="text" value="right after creation"/>	
Default Document Type:	<input type="text" value="Invoice"/>	
Show Cost:	<input type="checkbox"/>	
Show Cost Type:	<input type="text" value="CurrentCost"/>	
Default Class ID:	<input type="text" value="Nodus"/>	

SAVE

Order


FIELD	DESCRIPTION
Order Number Prefix	Allows the user to enter a unique prefix to help identify the order number in Dynamics GP.
Order Number Length	Establish the number of digits used in the order document number. The maximum number allowed is 16.
Order Back Office Document Type	Specify the Order Type ID for newly generated orders from ePay. IMPORTANT: The document type ID MUST already exist in Dynamics GP.


Sales Order Entry Settings


Configuration settings for Sales Order Entry module

Sales Order Entry Settings **Order** Invoice

Setup order document types for Sales Order Entry

Order Number Prefix: 

Order Number Length: 

Order Back Office Document Type: 

SAVE

Invoice

FIELD	DESCRIPTION
Invoice Number Prefix	Allows the user to enter a unique prefix to help identify the invoice number in Dynamics GP.
Invoice Number Length	Establish the number of digits used in the order document number. The maximum number allowed is 16.
Invoice Back Office Document Type	Specify the Invoice Type ID for newly generated invoices from ePay. IMPORTANT: The document type ID MUST already exist in Dynamics GP.

Sales Order Entry Settings

Configuration settings for Sales Order Entry module

Sales Order Entry Settings | Order | Invoice

Setup invoice document types for Sales Order Entry

Invoice Number Prefix: ?

Invoice Number Length: ?

Invoice Back Office Document Type: ?

[SAVE](#)

2.2.7. Manage Contract Class ID

(Settings > Manage Contract Class ID)

This option is only available with the [Recurring Billing](#) module of ePay

Allows the user to create and manage contract class ID in the ePay Recurring Invoice Contract module. The purpose of Contract Class ID is to group the different types of Recurring Invoice contracts. To create a contract class ID, follow the steps below:

1. Click on **Create Class**
2. Populate a preferred class description into **Class Name** field
3. Populate a preferred format for Batch ID for all recurring invoice contract

Examples:

FORMAT TYPE	ENTRY FORMAT	DISPLAY
<i>Prefix format for Batch ID for the recurring Invoices in GP</i>	RB [mm/yy]	RB 09/11
<i>Postfix format for Batch ID for the recurring Invoices in GP</i>	RB [mm/yy] AUTO	RB 09/11 AUTO
<i>Basic format</i>	RBCONTRACT	RBCONTRACT

4. Populate a preferred format for GL Reference Format for all recurring billing contract. Format should be based on your firm's business logic. This will be integrated into Dynamics GP's GL Reference field under SOP's Sales Document Detail Entry.

Manage Contract Class ID

Setup Contract Class ID for Recurring Billing module

Existing Classes

[Create Class](#)

ACTION	CLASS NAME	BATCH FORMAT	GL REFERENCE FORMAT
Delete Edit	AUTO	EPAY-[MM/YY]	EPAY[MON]

Class Name:

Batch Format:

GL Reference Format:

?

?

?

CANCEL
SAVE

To edit or delete a contact class ID, select a contract class ID from the list and click either **Delete** or **Edit** as shown in the **Action** column of the table displayed above.

When editing a contract class ID, the page shown above will appear as shown with the selected contract ID properties populating the Class, Batch and GL Reference format textboxes. Make changes as needed in those textboxes and click the **Save** button.

2.2.8. Tax Settings

(Settings > Tax Settings)

This option is only available with the [Avatax](#) module of ePay

Tax information can be either handled by GP or AvaTax, an add-on 3rd party tax service from Avalara, Inc. that is supported by ePay. This third party software communicates directly to ePay and supplies tax data information as needed.

- Tax settings already established in Dynamics GP can be used by selecting the Standard GP Tax Setup option from the **Tax Setup** checklist.
- When choosing AvaTax, the page displays required AvaTax setup information. This configuration detail must be gathered from AvaTax prior to filling out the form displayed on the AvaTax setup page.

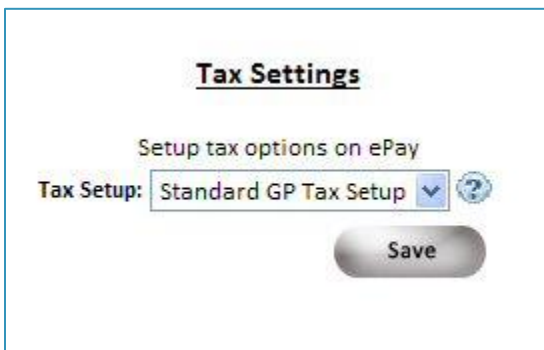


Figure 2-28 Tax Settings

Tax Settings

Setup tax options on ePay

Tax Setup: AvaTax ?

Allow Checkout when AvaTax web service is unavailable

Charge Tax on Shipping

Charge Tax on Handling

AvaTax AccountID:

AvaTax LicenseKey:

AvaTax Username:

AvaTax Password:

AvaTax ServiceURL:

AvaTax CompanyCode:

Default AvaTax TaxScheduleID for new User:

AvaTax Shipping ItemCode:

AvaTax Misc. ItemCode:

Avatax Customized Error Message:

Send Email if AvaTax integration encounters error(s)

Email Address:

Subject:

[Test Ava Tax Settings](#)

Figure 2-29 Tax Settings – AvaTax

SETTING	DESCRIPTION
<i>Allow Checkout when AvaTax web service is unavailable</i>	Allows the order/invoice process to be completed, even if there are problems gathering tax amount calculation from AvaTax web service. NOTE: The order/invoice created on ePay at this point will not include any tax amount.
<i>Charge Tax on Shipping</i>	Enables tax to be added to shipping charges.
<i>Charge Tax on Handling</i>	Enables tax to be added to handling charges.
<i>AvaTax AccountID</i>	Enter Account ID provided by AvaTax.
<i>AvaTax LicenseKey</i>	Enter License Key provided by AvaTax.
<i>AvaTax Username</i>	Enter the AvaTax-assigned user name.

<i>AvaTax Password</i>	Enter the AvaTax-assigned password.
<i>AvaTax ServiceURL</i>	Provided by Avatax, enter the AvaTax URL needed to access AvaTax service.
<i>AvaTax CompanyCode</i>	Enter the company code assigned by AvaTax.
<i>Default AvaTaxScheduleID for new User</i>	The default schedule ID received from Avatax for new customers.
<i>AvaTax Shipping ItemCode</i>	Provided by Avatax, this entry is used to calculate shipping/freight tax.
<i>AvaTax Misc. ItemCode</i>	Provided by Avatax, this entry is used to calculate miscellaneous tax.
<i>AvaTax Customized Error Message</i>	Allows a customized error message to be entered to handle error conditions such as a communication failure with AvaTax web services.
<i>Send e-mail if AvaTax integration encounters error(s)</i>	Mark this checkbox to send an e-mail notification when an AvaTax error occurs.
<i>E-mail Address</i>	Enter an e-mail address for AvaTax error notification.
<i>Subject</i>	Enter a subject line for AvaTax error e-mails.

Troubleshooting: Avatax

NOTE: These settings only needed if Avatax SDK is installed on ePay's Web Server. Avatax SDK is **NOT** required to be installed on ePay's Web Server in order for ePay to work with Avatax web service.

Disabled Event Viewer

Since Avatax writes to EventLog, if Event Viewer is disabled, user would probably need to remove the path to the log so that Avatax will not try to access and write to EventLog which might error out.

For Windows Server 2008, if Event Viewer is disabled, you have to delete the Parameters key under HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\EventLog.

Permission for Event Log

Since Avatax writes to EventLog, user would probably need to grant permission for Avatax to write to the log so Avatax does not error out due to insufficient privileges.

For Windows Server 2003, just need to add "Network Service" with "Full Control" to EventLog key (HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\EventLog), it will affect Security key under EventLog key.

For Windows OS other than Windows Server 2003, need to add "Network Service" with "Full Control" to EventLog Key (HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\EventLog) and "Network Service" with "Read" to Security key. (HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\EventLog\Security)

2.2.9. Terms & Conditions

(Settings > Terms & Conditions)

The Terms & Conditions page is used to create and configure a detailed terms and conditions agreement to be presented to the customer user during certain actions. Each tab on this page represents a separate agreement. The text editor can be utilized to configure HTML text and styling within the agreement.

Customer Wallet

This tab is only available with the Encryption or Tokenization option of ePay

The customer wallet tab is for configuring the terms and conditions agreement when the user is creating and editing their wallet. The following options are available:

- **Show Agreement** – Enabling this option will display the terms and conditions agreement when the user is on the wallet page
- **Require Customer Confirmation for New Wallet Entry** – Enabling this option will require that the customer user mark a checkbox after reviewing the agreement when they create a new wallet entry
- **Require Customer Confirmation Wallet Modifications** – Enabling this option will require that the customer user mark a checkbox after reviewing the agreement when they edit their wallet

Payment

This tab is only available with the [Online Bill Pay](#) module of ePay

The payment tab is for configuring the terms and conditions agreement when the user is making a payment. The following options are available:

- **Show Agreement** – Enabling this option will display the terms and conditions agreement when the user is on the 'Review and Pay' page to make a payment
- **Require Customer Confirmation for Pay Later** – Enabling this option will require that the customer user mark a checkbox when saving a transaction to be paid at a later time
- **Require Customer Confirmation When Saving Wallet** – Enabling this option will require that the customer user mark a checkbox when they save their wallet. *(This option is only available with the [Encryption](#) or [Tokenization](#) option of ePay)*
- **Always Require Customer Confirmation** – Enabling this option will require that the customer always mark a checkbox during their payment. This option will override the previous options since the confirmation must always occur.

AutoPay Contract

This tab is only available with the [AutoPay](#) module of ePay

The AutoPay contract tab is for configuring the terms and conditions agreement when the user is saving or editing an AutoPay contract. The following options are available:

- **Show Agreement** – Enabling this option will display the terms and conditions agreement when the user is on the create or edit AutoPay contract pages
- **Require Customer Confirmation for New Contract** – Enabling this option will require that the customer user mark a checkbox when creating a new AutoPay contract
- **Require Customer Confirmation when Editing Contract** – Enabling this option will require that the customer user mark a checkbox when editing an AutoPay contract

Express Payment

This tab is only available with the [Tokenization or PayFabric](#) modules of ePay

The Express Pay tab is to be used for configuring the terms and conditions agreement when the user clicks the Express Payment Link. The following options are available:

- **Show Agreement** – Enabling this option will display the terms and conditions agreement when the user is viewing the Express Payment page
- **Require Customer Confirmation** – Enabling this option will require that the customer user mark a checkbox before they complete the Express Payment.

2.2.10. Design Invoice Templates

(Settings > Invoice Display > Design Invoice Templates)

The 'Design Invoice Templates' page is used to create invoice templates to be assigned to different types of invoices. To assist in designing invoice templates, a separate Invoice Template Guide document is available for designers with basic knowledge of HTML. This guide can be obtained from the below link:

<http://www.nodus.com/documentation/ePay-Invoice-Template-Guide-v2.pdf>

The following features are available on this page:

- **Load Saved Template** – This dropdown can be used to load an existing saved template. If the currently loaded template has unsaved changes, modifying this dropdown box will result in the changes being lost.

- **Template Name** – This field holds the template name to be used with the 'Save' button is clicked. This name can be modified to allow for the current template to be copied. Certain system templates cannot be edited or deleted, so a different name can be used to save required modifications to these templates.
- **Test Invoice Number** – This field can be used to view how the entire template will look based on a certain invoice.

The Invoice template itself is broken into three sections:

- **Main Invoice Body**
 - This section is for the header and main body of the invoice display.
- **Line Item Section**
 - This section contains the content that will be populated into the `[[[LineItemSection]]]` variable from the Main Invoice Body. The items associated to the invoice are intended to be added to this section.
 - The line items can be grouped into separate sections based on different variables. For example, if some items have a shipping address set to one location and other items are to be shipped to another location. The items will be grouped based on the marked checkboxes in the 'Select variables to divide line items into different groups' at the bottom of the page.
- **Applied Payments**
 - This section contains the content that will be populated into the `[[[AppliedPaymentsSection]]]` variable from the Main Invoice Body. The payments that are associated to the payments are shown in this section.

2.2.11. Assign Invoice Templates

(Settings > Invoice Display > Assign Invoice Templates)

The 'Assign Invoice Templates' page is used for assigning different invoice types to the create invoice templates. The table on this page shows the available invoice types on the left side and the assigned template on the right. In order for an Invoice Type to display in the table, at least one invoice of this type must be imported into ePay.

Assign Invoice Templates

Assign a template to each invoice type

INVOICE TYPE	TEMPLATE
-Default-	ePay Original ▼
DEBIT MEMO	Debit Memo Template ▼
EPIV	-Same as Default- ▼
FINANCE CHARGE	-Same as Default- ▼
INVOICE	-Same as Default- ▼

1 [2](#)

Add/Edit Templates
SAVE

When the user views the invoice from ePay, the assigned template will be shown as the display for the invoice. If the Invoice Type is assigned to the '-Same as Default-' template, then the template that is utilized will be the template that is assigned to the '-Default-' Invoice Type.

Clicking the '**Add/Edit Templates**' button will direct the user to the 'Design Invoice Templates' page and the '**Save**' button can be used to save changes made on the page.

2.2.12. Multicurrency Settings

(Settings > Multicurrency Settings)

This page is only available with the [Encryption and PayFabric](#) modules of ePay

This page is used to configure each currency to determine the assigned processing options and the settings for integration to the back office ERP.

Multicurrency Settings

[Import currency information from back office](#)


SELECT	CURRENCY ID	DESCRIPTION	SYMBOL
<input type="radio"/>	US\$	US Dollars	\$
<input type="radio"/>	EURO	European Euro	€
<input checked="" type="radio"/>	C\$	Canadian Dollars	C\$


Transaction Processing Options


Card Name Mapping


Payment Options

Set Available Payment Options

Credit Card Setup ID: 

Accept Credit Cards: 

eCheck Setup ID: 

Accept eCheck: 

SAVE

For the initial import of the currency information from the back office ERP, click the 'Import currency information from back office' link at the top of the page.

The settings can be configured by selecting the desired currency and configuring the settings in the specific tab in the lower section. When changes are complete the 'Save' button can be used to save the changes. Changes to the functional currency cannot be made from this page and should be made from the main setting pages.

Transaction Processing Options – The settings in this tab are similar to the same tab for the functional currency on the 'Site Settings' page. The setup ID can be configured for Credit Card and eCheck transactions to go a specific gateway account when making a payment in a different currency.

Card Name Mapping – The setting in this tab are similar to the same tab for the functional currency on the 'Back Office Settings' page. The options here will determine the value that is sent to the back office ERP when a payment is made using a certain payment type like Visa or MasterCard for payments in different currencies.

Payment Options – The setting in this tab are similar to the same tab for the functional currency on the 'Back Office Settings' page. The options here will determine the batch prefix for and payment number for payments in different currencies.

2.3. Manage Users

The 'Manage Users' menu provides different options for creating and managing user accounts on ePay. This section will cover the different actions that can be performed relating to the user account from the administrative portal.

2.3.1. Creating an Administrator or CSR Account

Use the following steps to create a new administrator or CSR user account. CSR accounts made through this method will have access to all customer accounts.

1. Using the menu on the Administrator Portal, go to the following path
 - a. To create a new Administrator user: Manage Users → New Admin User
 - b. To create a new CSR user: Manage Users → New CSR User

New CSR User

Create new local CSR to access customer accounts on ePay

First Name:	<input type="text"/>
Last Name:	<input type="text"/>
User Name:	<input type="text"/>
Password:	<input type="password"/>
Confirm Password:	<input type="password"/>
E-mail:	<input type="text"/>

CREATE USER

2. Populate the fields on this page for the new Administrator account
 - a. First Name (CSR Only) – The first name of the CSR User
 - b. Last Name (CSR Only) – The last name of the CSR User
 - c. User Name – The desired user name for this account
 - d. Password – The desired password to be used for this account to login
 - e. Confirm Password – The same value provided in the 'Password' field
 - f. E-mail – The e-mail address associated to the user of this account
3. Click the 'Create User' button to create the account

2.3.2. Registering a Customer or Salesperson

Use the following process to register a customer account or a salesperson as a CSR account. CSR accounts registered through this method will only have access to accounts that are assigned to the salesperson.

1. Using the menu on the Administrator Portal, go to the following path
 - a. To register a new customer user: Manage Users → Register Customer
 - b. To register a new CSR user: Manage Users → Register CSR
2. If needed, enter a value in the 'Keywords' field relating to the customer or salesperson account and click 'Search' to filter the records in the table

Register Customer

Register Customer to activate GP's customer account on ePay

Keywords:

Max Results:

[Select All](#)

SELECT	USERNAME	CUSTOMER NUMBER	NAME	REGISTERED PHONE#	ACTIVATION CODE	EMAIL ADDRESS
<input type="checkbox"/>	<u>Register</u>	EPAYCUSTOMER	ePay Customer	9094824701	60223541-1818-46ff-be9a-f9e8200d5439	<input type="text" value="ePayCustomer@nodus.co"/>

3. Once the desired account is located, click the underlined 'Register' text in the 'Username' column
4. When the 'Register' text is clicked, the following fields will appear.
 - a. User Name – The desired user name for this account
 - b. Password – The desired password to be used for this account to login
 - c. E-mail – The e-mail address associated to the user of this account

USERNAME	CUSTOMER NUMBER	NAME	REGISTERED PHONE#
Username: <input type="text" value="ePayCustomer"/> Password: <input type="password" value="....."/> Email: <input type="text" value="ePayCustomer@nodus.com"/> Register Cancel	EPAYCUSTOMER	ePay Customer	9094824701

5. After the values have been populated, click the underlined 'Register' text to register the account

2.3.3. Send a Customer Registration Email to a Customer

To avoid the manually registering a customer account, an email can be sent to the customer user to allow for the customer to register their own account. This method of registration is recommended so the customer user can set their own password. The 'Customer Registration' email must be configured and email settings must be enabled for this functionality to work.

1. Using the menu on the Administrator Portal, go to 'Manage Users → Register Customer'
2. If needed, enter a value in the 'Keywords' field relating to the customer account and click 'Search' to filter the records in the table
3. Mark the Checkbox in the 'Select' column for the desired customer accounts to receive the registration e-mail

4. Populate the Email Address field with the email address of the desired recipient of the registration email
 - a. If an email address is already associated to this customer, the associated email address will automatically be populated in this field

SELECT	USERNAME	CUSTOMER NUMBER	NAME	REGISTERED PHONE#	ACTIVATION CODE	EMAIL ADDRESS
<input checked="" type="checkbox"/>	Register	EPAYCUSTOMER	ePay Customer	9094824701	22bd2867-b082-42c5-9bb3-3b5fe7180897	ePay@nodus.com

[Send Email](#)

5. In the bottom right corner of the page, click the 'Send Email' button to send the 'Customer Registration' email to the marked customer accounts

2.3.4. Resetting an Account Password

1. Using the menu on the Administrator Portal, go to 'Manage Users → Manage Users'

Manage Users

Maintain/Manage existing users (Admin/CSR/Customer) on ePay

Display users in role of Administrator ▼ [Create new administrators](#)

ACTIVE	ACTION	USERNAME	EMAIL	LAST LOGIN
<input checked="" type="checkbox"/>	Delete Reset Password	Admin	admin@nodus.com (Change)	7/23/2015 12:12:05 AM

2. Set the 'Display users in the role of' dropdown to the role of the user requiring the password to be reset.
3. Locate the desired user that requires a reset of password and click the 'Reset Password' text
4. When the link is clicked, the 'New Password' and 'Confirm Password' fields will appear

ACTIVE	ACTION	USERNAME
<input checked="" type="checkbox"/>	<p style="margin: 0;">New Password: <input style="width: 80%;" type="password"/></p> <p style="margin: 0;">Confirm Password: <input style="width: 80%;" type="password"/></p> <p style="text-align: right; margin: 0;">Save Cancel</p>	Admin

5. Populate both fields with the desired password for the user
6. Click the 'Save' text to apply the new password

2.3.5. Updating an Administrator Account Email Address

1. Using the menu on the Administrator Portal, go to 'Manage Users → Manage Users'
2. Set the 'Display users in the role of' dropdown to 'Administrator'
3. Locate the desired Administrator user with the e-mail address that needs to be changed
4. In the 'Email' column, click the 'Change' text next to the email address

ACTIVE	ACTION	USERNAME	EMAIL	LAST LOGIN
<input checked="" type="checkbox"/>	Delete Reset Password	Admin	admin@nodus.com (Change)	7/23/2015 5:31:17 PM

5. Enter the new email address for the administrator user
6. Click the 'Save' text to apply the new email

2.3.6. Deactivating and Reactivating an Account

Deactivating an account can be used for an account that will not be used for a certain period of time, but the account may be reactivated again in the future.

1. Using the menu on the Administrator Portal, go to 'Manage Users → Manage Users'
2. Set the 'Display users in the role of' dropdown to the role of the desired account
3. Locate the desired user to be deactivated or reactivated
4. Click the checkbox in the 'Active' column. If the checkbox is marked, the user will be activated, if the checkbox is unmarked, the user will be deactivated.

ACTIVE	ACTION	USERNAME	EMAIL	LAST LOGIN
<input checked="" type="checkbox"/>	Delete Reset Password	Admin	admin@nodus.com (Change)	7/23/2015 5:36:22 PM

2.3.7. Deleting or Unregistering an Account

Deleting can be done when the user account is intended to be permanently removed. This action is not reversible. Only Administrator accounts can be deleted, but one administrator account must remain. CSR accounts registered from a salesperson and customer accounts can be unregistered.

1. Using the menu on the Administrator Portal, go to 'Manage Users → Manage Users'
2. Set the 'Display users in the role of' dropdown to the role of the desired account
3. Locate the desired user to be deleted or unregistered
4. In the 'Action' column, click the 'Delete' or 'Unregister' text to delete the user

ACTIVE	ACTION	USERNAME	EMAIL	LAST LOGIN
<input checked="" type="checkbox"/>	Delete Reset Password	Admin	admin@nodus.com (Change)	7/23/2015 5:36:22 PM

2.3.8. Unlocking an Account

If a user makes multiple failed attempts to log into their account, their account may become locked.

1. Using the menu on the Administrator Portal, go to 'Manage Users → Manage Users'
2. Set the 'Display users in the role of' dropdown to the role of the user to be unlocked
3. Locate the desired user that was locked
4. In the 'Active' column, the underlined text 'Unlock' will be shown if the account is locked. Click the 'Unlock' text to unlock the account.

ACTIVE	ACTION	USERNAME	EMAIL	LAST LOGIN
<input checked="" type="checkbox"/> Unlock	Delete Reset Password	Admin	admin@nodus.com (Change)	7/23/2015 5:36:22 PM

2.3.9. Allow a CSR to View all Customer Accounts

By default, a CSR user registered from a Salesperson only have access to the customer accounts associated to the salesperson. The following process can be used to give a CSR user that was registered from a Salesperson access to all customer accounts.

1. Using the menu on the Administrator Portal, go to 'Manage Users → Manage Users'
2. Set the 'Display users in the role of' dropdown to 'CSR'
3. Mark the checkbox in the 'See All Customers' column

ACTIVE	SEE ALL CUSTOMERS	ACTION	USERNAME	SALES PERSON NUMBER	FIRST NAME	LAST NAME	EMAIL
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Unregister Reset Password	SalesPerson1	SALESPERSON1	First	Last	Salesperson@nodus.com

2.3.10. Creating a CSR Permission Group

A CSR Permission group can be used to provide a CSR user with additional permissions such as access to administrative pages from a CSR login. The following steps can be used to create a CSR Permission Group

1. Using the menu on the Administrator Portal, go to 'Manage Users → Group Permission'
2. Click the 'Create New Group' link near the bottom of the page to be taken the 'Group Permission Edit' page
 - a. If an existing group needs to be modified, find the group in the table and click the underlined 'Edit Permission' text
3. On the 'Group Permission Edit' page, provide a 'Group Name' to reference the group.
4. Mark any desired permissions for the CSR User

- a. Permissions: These permissions grant additional privileges to the CSR user using the eSOP Advantage module. *These options are only available with the eSOP Advantage module of ePay.*

Permission	Description
<i>Allow to Override Credit Limit</i>	Allows the CSR user to override the credit limit placed on a customer account
<i>Allow to Change Item Price</i>	Allows the CSR user to modify the price on a line item
<i>Allow to Change Item Description</i>	Allows the CSR user to change the description in a line item
<i>Allow to Create Customer</i>	Allows the CSR user to create a customer account
<i>Allow to Change Discount</i>	Allows the CSR user to adjust the discount on a line item

- b. Administrative Permissions: All of these permissions reflect different administrative pages that CSR Users in the permission group can have access to. When the CSR with these page permissions is signed into ePay, they will see these pages in the top menu under 'CSR → Administrative Pages'.

5. Click the 'Save' button to save the changes to the group

2.3.11. Assigning a CSR User to a Permission Group

1. Using the menu on the Administrator Portal, go to 'Manage Users → User Group Setting'
2. In the 'CSR' section on the left, click the desired CSR User from the menu to be assigned to the permission group
3. In the 'Available Groups' section on the right, click the desired permission group for the CSR user to join

User Group Setting

Assign security group permission to existing user(s) on ePay

4. Click the '<<' button and the group will move into the center 'Current User Group' section to show the CSR is part of the group.
 - a. If a CSR user needs to be removed from a group, click the group in the 'Current User Group' section and click the '>>' button to have the group move back into the 'Available Groups' section
5. Click the 'Save' button to save changes
6. A CSR User with access to Administrative Pages will see the pages from the top menu under 'CSR → Administrative Pages'.

2.4. Queues

2.4.1. Document Queue

The Document Queue page is used to monitor the status of documents from ePay to the back office ERP system. To navigate to this page, log into the administrative portal and using the top menu, browse to 'Queues → Document Queue'.

Document Queue

Queue for documents submission into Back Office

DOCUMENT NUMBER:

Max Results:

[SEARCH](#) [RESET](#)

[All](#) [Failed](#) [Pending](#) [Sent](#)

[CLEAR ALL](#)

DATE	STATUS	TYPE	DOCUMENT NUMBER	# TRIES	VIEW
7/20/2015 1:46:26 PM	Submitted	Payment	<u>WEBPMT0000000008</u>	0	Details

To quickly search for a document on this page, enter the document number to be searched into the 'Document Number' field and click 'Search'

The underlined value in the 'Document Number' column can be used to view the details on a document. This is not available for all document types.

The underline 'Details' link can be used to view the document XML (The information that is submitted to the back office ERP) and any error messages associated with the Document Queue.

The tabs on this page can be used to sort the documents shown in the table of documents.

- **All** – Shows all the documents in the document queue in a single list
- **Failed** – Shows the documents that have failed to reach the back office ERP. Action should be taken to ensure these documents are managed.
 - The 'Resubmit All' button that appears in this tab can be used to change the status of all documents in this tab to 'Pending'.
- **Pending** – Shows documents that need to be submitted to the back office ERP. If documents are stuck in the pending status, please ensure the 'Document Queue' scheduler worker is enabled from the [Payment Scheduler](#) tab of the 'Site Settings' page.
- **Sent** – Shows documents that have been successfully sent into the back office ERP
 - The 'Clear All' button that appears in this tab can be used to clear this log to preserve data

Managing failed documents

Documents that fail to reach the back office ERP should be managed as soon as possible since ePay and the ERP will have conflicting data. After clicking the underlined 'Details' text for a failed document, the page with the document XML will be displayed. This document details page can be used to assist in managing the failed document.

Number: WEBPMT0000000009	Last Sent: 7/24/2015 11:34:13 AM
Type: Payment	Status: Failed
DocumentXML:	Remove Re-Submit
<pre><CashReceipts> <CashReceipt> <PaymentLines> <PaymentLine> <CCNumber>XXXXXXXXXXXX1111</CCNumber> <CCType>VISA</CCType> </PaymentLine> </PaymentLines> </CashReceipt> </CashReceipts></pre>	
ErrorCode: 1	FailedAttempts: 1
ErrorString:	
<pre>Unable to Submit Document to Back Office: The Web Service was not available</pre>	
<input type="button" value="« BACK"/>	

- **Document XML** – This section contains the information that is being sent to the back office ERP. Advanced users can modify this information when needed to make desired adjustments to get the document to integrate.
- **Remove** – The underlined 'Remove' text can be used to remove the document from the queue from the queue. This action cannot be reversed and should only in the case when the document should never go to the back office ERP.
- **Re-Submit** – The underlined 'Re-Submit' text can be used to resubmit the document XML to the back office ERP.
- **Error String** – This section contains the error returned when the document was previously submitted to the back office ERP.

2.4.2. Payment Queue

The Payment Queue lists the details the automatically processed payment transactions that returned an error when processing.

The 'Keywords' search field can be used to search for the payment number, the customer number or the customer name.

The underlined 'Reprocess' text can be used to reprocess a single transaction

The 'Reprocess All Failed' button can be used to reprocess all failed transactions. This should only be used if there is a large scale problem resulting in many failed transactions. **Please take caution in clicking this button if the Payment Queue is not well managed as unintended transactions could be reprocessed.**

Payment Queue

Queue for failed credit card/eCheck payments awaiting reprocess

Keywords:

SCHEDULED DATE	PAYMENT NUMBER	CUSTOMER #	NAME	AMOUNT	PROCESS STATUS	LAST ATTEMPT	TYPE	ACTION
4/16/2014	WEBPMT0000000269	SMITH999	John Meyer	\$40.00	Failed	4/16/2014 5:05:41 PM	Regular	Reprocess
10/15/2013	WEBPMT0000000222	CHUNG0001	STBN Broadcasting	\$6,949.10	Failed	10/15/2013 12:04:05 AM	Recurring	Reprocess

2.5. Reports

There are multiple different reports available with ePay Advantage. Many of these reports feature varying search fields that can be used to filter the results as well as the option to export the results to a .csv file in the lower right corner of the page. This section will review the different reports and their functionality.


2.5.1. Payments


This report creates a list of all payment documents. The list can be filter by customer or date range. The payment documents are categorized into different tabs for user to view payments group by status. This report can be downloaded as an Excel spreadsheet by clicking the link at the lower right corner of the page.

Payments

Report that lists all payment documents on ePay

Customer Number:

From: 

To: 

PAYMENT #	DATE	PROCESSED DATE	STATUS	CUSTOMER #	NAME	AMOUNT	SOURCE
WEBPMT8000000031	8/20/2015	8/20/2015 1:34:51 PM	Processed	AARONFIT0001	Aaron Fitz Electrical	\$114.60	Regular
WEBPMT8000000030	8/20/2015	8/20/2015 1:03:18 PM	Processed	AARONFIT0001	Aaron Fitz Electrical	\$0.65	Regular
WEBPMT8000000029	8/19/2015	8/19/2015 2:53:33 PM	Processed	ADAMPARK0001	Adam Park Resort	\$1.02	Regular
WEBPMT8000000028	8/18/2015	8/18/2015 4:13:24 PM	Processed	AARONFIT0001	Aaron Fitz Electrical	\$10.91	Regular

2.5.2. Installment Contracts


This report is only available with the *Installment Payments* module of ePay


This report displays a list of active and on-hold installment contracts. The contracts are searchable and the report can be filtered by customer number or date range. In addition to standard data such as customer and contract IDs, this report features summary information such as invoice Balance Due and Contract Remaining Balance. This report can be downloaded as an Excel spreadsheet by clicking the link at the bottom of the table.

Installment Contracts Report

Report that lists all existing active installment contracts

Customer Number:

From: 

To: 

[SEARCH](#) [RESET](#)

Filter by: Contract Status

CONTRACT #	CUSTOMER #	INVOICE #	CUSTOMER NAME	BALANCE DUE	CONTRACT REMAINING AMOUNT	PRIMARY PHONE#	PAYMENT TERMS	FAILED PAYMENTS
WSPC000009	AARONFIT0001	SLS11015	Aaron Fitz Electrical	\$350.00	\$350.00	42555501010000	4	0
WSPC000008	SMITH0011	STDINV2319	Jackie Smith	\$7.00	\$7.00	00000000000000	5	3
WSPC000007	AARONFIT0001	DM20005	Aaron Fitz Electrical	\$1,011.24	\$1,055.00	42555501010000	12	4
WSPC000006	AARONFIT0001	SLS11012	Aaron Fitz Electrical	\$569.16	\$597.80	42555501010000	12	4
WSPC000005	AARONFIT0001	INVS3008	Aaron Fitz Electrical	\$89.00	\$246.04	42555501010000	5	3
WSPC000004	AARONFIT0001	SVC1000	Aaron Fitz Electrical	\$66.93	\$68.62	42555501010000	6	3
WSPC000003	AARONFIT0001	FC20010	Aaron Fitz Electrical	\$5.00	\$5.00	42555501010000	4	2
WSPC000002	ADAMPARK0001	STDINV2225	Adam Park Resort	\$22.78	\$22.97	31755501020000	4	1
WSPC000001	ADAMPARK0001	STDINV2250	Adam Park Resort	\$5.62	\$5.66	31755501020000	4	1

[Download As Excel spreadsheet](#)

2.5.3. Installment Payments


This report is only available with the [Installment Payments](#) module of ePay


This report will show the individual installment payments for each installment contract. The search function can be used to display payments for a specific customer or a certain date range. Features in this table include a listing of all payments made to specific installment contracts and whether the payments were successfully processed. This report can be downloaded as an Excel spreadsheet by clicking the link at the bottom of the table.

Installment Payment Report

Report that lists all installments for existing installment contracts

Customer Number:

From: 

To: 

CUSTOMER #	NAME	CONTRACT #	INSTALLMENT #	AMOUNT	PROCESSED	CREATED BY
AARONFIT0001	Aaron Fitz Electrical	WSPC000004	0	\$33.70	Yes	
AARONFIT0001	Aaron Fitz Electrical	WSPC000009	0	\$133.33	Yes	
AARONFIT0001	Aaron Fitz Electrical	WSPC000005	0	\$270.01	Yes	
AARONFIT0001	Aaron Fitz Electrical	WSPC000006	0	\$543.70	Yes	
AARONFIT0001	Aaron Fitz Electrical	WSPC000007	0	\$500.00	Yes	
AARONFIT0001	Aaron Fitz Electrical	WSPC000007	1	\$175.83	Yes	
AARONFIT0001	Aaron Fitz Electrical	WSPC000005	1	\$123.02	Yes	

2.5.4. Recurring Billing Contracts


This option is only available with the [Recurring Billing](#) module of ePay

All current recurring billing contracts are listed in this report. The contracts are searchable and report can be filtered by 'Contract Status' and 'Failed Payment and On-Hold Contract Only'. In addition to standard data such as customer and contract IDs, this report features information such as Contract Status and Last Processed Date of the Recurring Billing contract. This report can be downloaded as an Excel spreadsheet by clicking the link at the bottom of the table.

Recurring Billing Contracts

Report that lists all existing active recurring billing contracts

Customer Number:

Next Bill Date From: 

Next Bill Date To: 

Filter by:

Display On-Hold Contracts and Contracts with Failed Payments Only

CUSTOMER NUMBER	CUSTOMER NAME	CONTRACT	CREATED ON	NEXT BILL DATE	STATUS	LAST PROCESSED	RESULT
AARONFIT0001	Aaron Fitz Electrical	RB00000000000005	5/29/2012 2:32:52 PM	5/31/2013	Active	4/30/2013 12:01:00 AM	EPTV000000000307
AARONFIT0001	Aaron Fitz Electrical	RB00000000000007	5/30/2012 5:37:29 PM	5/30/2013	Active	4/30/2013 12:00:52 AM	EPTV000000000306
AARONFIT0001	Aaron Fitz Electrical	RB00000000000009	6/5/2012 4:01:01 PM	5/5/2013	Active	4/5/2013 12:01:02 AM	EPTV000000000275

2.5.5. AutoPay Contracts


This option is only available with the [AutoPay](#) module of ePay


This report displays high level summary details for Recurring Payment (AutoPay) contract. The report can be further filtered by 'Contract Status' drop-down list. This report can be downloaded as an Excel spreadsheet by clicking the link at the bottom of the table.

AutoPay Contracts

Report that lists all existing active autopay contracts

Customer Number:

From: 

To: 

Filter by: Contract Status

CUSTOMER #	NAME	CONTRACT #	CREATED DATE	NEXT PAYMENT DATE	FREQUENCY	AMOUNT	LAST PAYMENT NUMBER	LAST PAYMENT DATE	LAST PAYMENT STATUS	LAST GATEWAY MESSAGE
AARONFIT0001	Aaron Fitz Electrical	RBP00000000000004	5/20/2012	9/20/2012	Pay every month on the 20th	\$5.00	WEBPMT0000000079	1/9/2013	Failed	The following errors occurred with the transaction:COMMERROR:Communication Failure.
AARONFIT0001	Aaron Fitz Electrical	RBP00000000000006	5/30/2012	9/30/2012	Pay every month on the 30th	\$15.00	WEBPMT0000000080	1/9/2013	Failed	The following errors occurred with the transaction:COMMERROR:Communication Failure.
SMITH0012	Jasmine Smith	RBP00000000000034	7/30/2012	9/30/2012	Pay every month on the 30th	\$10.00	WEBPMT0000000081	1/9/2013	Failed	The following errors occurred with the transaction:COMMERROR:Communication Failure.

[Download As Excel spreadsheet](#)

2.5.6. AutoPay Payments

This option is only available with the [AutoPay module of ePay](#)

This report displays payment details associated with AutoPay contracts. User can search for contracts by Customer Number or Date Range. The report can be further filtered by checkmark the box **Display Failed Payments Only** to only display the failed payment documents for AutoPay contracts. This report can be downloaded as an Excel spreadsheet by clicking the link at the bottom of the table.

AutoPay Payments

Report that lists all installments for existing autopay contracts

Customer Number:

From:

To:

Display Failed Payments Only

PAYMENT #	DATE	PROCESSED DATE	STATUS	CUSTOMER #	NAME	CONTRACT #	AMOUNT
WEBPMT0000000123	3/14/2013	3/14/2013 4:20:33 PM	Processed	CHUNG0001	STBN Broadcasting	RBP000000000044	\$5.00
WEBPMT0000000001	5/4/2012	5/4/2012 8:54:17 AM	Processed	AARONFIT0001	Aaron Fitz Electrical	RBP000000000001	\$15.00
WEBPMT0000000032	6/19/2012	6/19/2012 11:59:00 PM	Processed	SMITH0009	Jack Smith	RBP000000000023	\$25.00

2.5.7. Preview Recurring Billing Invoices

This option is only available with the [Recurring Billing module of ePay](#)

This report allows future billing cycles to be viewed in advance. In addition to a standard search, the search can allow the user to choose only those dates where recurring billing invoice contracts are due next. To apply this option:

1. Mark the By **Available Billing Date** checkbox
2. Click the drop-down list and select an available billing date
3. The table will display future billing contracts

After the report is created, the user can filter the table in the following ways:

FEATURE	DESCRIPTION
Last Billing Cycle only	Marking this checkbox will display only those contracts that are in their final billing period.
Contract Class	This drop-down list allows the user to filter by contract class. If no contract class is chosen, contracts for all classes will be displayed.

To assist in inventory management, the preview report will also include a summary of the item quantities that will be needed during the billing cycle chosen. These items are a cumulative total of all items on all invoices displayed on the table for the selected billing date.

NOTES:

- Only one billing cycle can be viewed ahead of the current date.
- As shown in the accompanying figure, the recurring billing invoice contract or item reports can be downloaded to an Excel spreadsheet by clicking the link below either table.

Preview RB Invoices

Report that allows user to preview contracts to be processed in the upcoming billing.

By Any Billing Date:

By Available Billing Date:

Filter by: Last Billing Cycle only Contract Class:

CUSTOMER NUMBER	CUSTOMER NAME	CONTRACT NUMBER
SMITH0006	Joe Smith	RB00000000000030

[Download RB Contract As Excel spreadsheet](#)

ITEM CODE	TOTAL QTY
128 SDRAM	1
A100	1

[Download Summary As Excel spreadsheet](#)



2.5.8. Audit Payments

The payment audit trail report allows the user to track payments created by user & user role. The report lists all payments made by Customers, CSRs and Scheduler with a created date and

timestamp. This report can be downloaded as an Excel spreadsheet by clicking the link at the bottom of the table.

Audit Payments

Audit report that allows user to view payments made by users (customer or CSR).

Login ID:
Customer Number:
Payment Number:
Amount:
From: 
To: 
Date Type:

Filter by: Role

ROLE	LOGINID	CUSTOMER NUMBER	PAYMENT NUMBER	CREATED DATE	SCHEDULED DATE	AMOUNT	TIMESTAMP
CSR	nikki	ADVANCED0002	WEBPMT0000000140	4/25/2013		\$15.00	4/25/2013 12:44:26 PM
CSR	nikki	AARONFIT0001	WEBPMT0000000139	4/25/2013		\$160.00	4/25/2013 10:52:27 AM
CSR	nikki	CHUNG0001	WEBPMT0000000138	4/25/2013		\$60.00	4/25/2013 8:30:23 AM
Scheduler	N/A	AARONFIT0001	WEBPMT0000000137	4/24/2013	4/24/2013	\$5.00	4/24/2013 8:53:30 AM

2.5.9. Credit Card Expiration Report

This report lists all the expired credit card(s) based on a specified range of expiration dates. The user can filter expired credit card entries that are associated with contracts by marking the box 'Include Credit Cards Associated with Contracts Only'.

Credit Card Expiration Information

Report that lists the credit card entry base on a specified range of expiration date.

Starting Expiration Month: /

Ending Expiration Month: /

Include Credit Cards Associated with Active Contracts Only

Max Results:

[SEARCH](#) [RESET](#)

[Select All](#)

ACTION	CUSTOMER ID	CUSTOMER NAME	WALLET ID	ACCOUNT HOLDER	CREDIT CARD#	EXP DATE	SELECT
	ADAMPARK0001	Adam Park Resort	MasterCard	David	XXXXXXXXXXXX4444	12/2016	<input type="checkbox"/>
	TEST SPACE	Test	MasterCard	Test User	XXXXXXXXXXXX4444	12/2016	<input type="checkbox"/>
	ALTONMAN0001	Alton Manufacturing	MasterCard	Test Test	XXXXXXXXXXXX4444	12/2016	<input type="checkbox"/>
	ADAMPARK0001	Adam Park Resort	MasterCard	Test User	XXXXXXXXXXXX4444	12/2016	<input type="checkbox"/>
	AARONFIT0001	Aaron Fitz Electrical	MasterCard	Test User	XXXXXXXXXXXX4444	12/2016	<input type="checkbox"/>

[Download As Excel spreadsheet](#) [Send Email](#)

A user with access to this report, can send the 'Credit Card Expiration Warning' email to customers to manually notify them of their expiring credit cards by marking the value in the 'Select' column and clicking the 'Send Email' button. The [Credit Card Expiration Warning](#) email must be configured to be sent for this functionality to work.

A CSR user with access to this report can click the pencil icon in the 'Action' column and modify the information associated to the wallet entry directly from the report.

2.5.10. Outstanding Invoices Report

This option is only available with the [Tokenization or PayFabric® options](#) of ePay

This report lists the outstanding invoices across all customers. Using this report, a CSR or administrator user can send the [Express Pay Notification](#) email that will contain a link that the recipient may click and make a one-time payment from the [Express Pay](#) page without having to login to ePay. This report will be filtered to only show certain customer accounts for a CSR user without the permission to [view all accounts](#).

Outstanding Invoices Report

Report that lists all outstanding invoices on ePay

Customer Number:

Show Transactions All From:

To:

[Select All](#)

SELECT	CUSTOMER# ▲	CUSTOMER NAME	TRANSACTION#	TRANS DATE	DUE DATE	TRANS AMOUNT	BALANCE DUE	DISC AVAIL	IF PAID BY	EMAIL ADDRESS
<input type="checkbox"/>	AARONFIT0001	Aaron Fitz Electrical	SALES00000001001	05/09/2017	06/08/2017	\$53.50	\$53.50	\$0.00	5/9/2017	<input type="text" value="nikki@nodus.com"/>
<input type="checkbox"/>	AARONFIT0001	Aaron Fitz Electrical	STDINV2268	04/12/2017	05/12/2017	\$39.95	\$39.95	\$0.00	4/12/2017	<input type="text" value="nikki@nodus.com"/>
<input type="checkbox"/>	AARONFIT0001	Aaron Fitz Electrical	STDINV2266	04/12/2017	05/12/2017	\$135.20	\$135.20	\$0.00	4/12/2017	<input type="text" value="nikki@nodus.com"/>
<input type="checkbox"/>	AARONFIT0001	Aaron Fitz Electrical	STDINV2270	04/12/2017	05/12/2017	\$39.95	\$39.95	\$0.00	4/12/2017	<input type="text" value="nikki@nodus.com"/>
<input type="checkbox"/>	AARONFIT0001	Aaron Fitz Electrical	STDINV2252	04/12/2017	05/12/2017	\$5,702.69	\$5,702.69			<input type="text" value="nikki@nodus.com"/>

To send the [Express Pay Notification](#) email to customers:

1. Check mark the box(s) under 'Select' for the preferred outstanding invoices
2. The 'Send Email' button will be enabled
3. The email address column will be pre-populated if the customer has an existing email on file. User can modify the default email address (if needed) before sending out the notification.
4. Click on 'Send Email' button to send out 'Express Pay Notification' email to customers to provide a one-time payment capability.
5. A confirmation message will be displayed if the email was sent out successfully

[Clear All](#) [Select All](#)

SELECT	CUSTOMER#	CUSTOMER NAME	TRANSACTION#	TRANS DATE	DUE DATE	TRANS AMOUNT	BALANCE DUE	DISC AVAIL	IF PAID BY	EMAIL ADDRESS
<input checked="" type="checkbox"/>	AARONFIT0001	Aaron Fitz Electrical	SALES00000001001	05/09/2017	06/08/2017	\$53.50	\$53.50	\$0.00	5/9/2017	<input type="text" value="nikki@nodus.com"/>
<input type="checkbox"/>	AARONFIT0001	Aaron Fitz Electrical	STDINV2268	04/12/2017	05/12/2017	\$39.95	\$39.95	\$0.00	4/12/2017	<input type="text" value="nikki@nodus.com"/>
<input type="checkbox"/>	AARONFIT0001	Aaron Fitz Electrical	STDINV2227	04/12/2017	05/12/2017	\$171.10	\$171.10			<input type="text" value="nikki@nodus.com"/>
<input type="checkbox"/>	AARONFIT0001	Aaron Fitz Electrical	STDINV2272	04/12/2017	05/12/2017	\$39.95	\$39.95	\$0.00	4/12/2017	<input type="text" value="nikki@nodus.com"/>
<input type="checkbox"/>	AARONFIT0001	Aaron Fitz Electrical	STDINV2267	04/12/2017	05/12/2017	\$10.70	\$10.70	\$0.00	4/12/2017	<input type="text" value="nikki@nodus.com"/>
<input type="checkbox"/>	AARONFIT0001	Aaron Fitz Electrical	STDINV2264	04/12/2017	05/12/2017	\$641.99	\$641.99	\$0.00	4/12/2017	<input type="text" value="nikki@nodus.com"/>
<input type="checkbox"/>	AARONFIT0001	Aaron Fitz Electrical	STDINV2273	04/12/2017	05/12/2017	\$39.95	\$39.95	\$0.00	4/12/2017	<input type="text" value="nikki@nodus.com"/>

1 2 3 4 5 6 7 8 9 10 ...

2.5.11. Terms and Conditions Report

This report can be used to view the acceptance of the Terms and Conditions Report for auditing purposes.

Terms And Conditions Report

Audit report for Terms and Conditions Agreement.

Value:

Customer Number:

Type:

From Date:

To Date:

VALUE	USER	CUSTOMER NUMBER	CONFIRMED	ACCEPTANCE DATE	ACCEPTANCE TIME	ACCEPTANCE VERSION
WEBPMT0000000004	ePayUser123	EPAY123	Yes	06/29/2015	11:00:17	06/29/15 9:27:21 AM
WEBPMT0000000005	COMPUTER0001	COMPUTER0001	No	06/29/2015	11:26:50	06/29/15 9:27:21 AM
WEBPMT8000000015	AARONFIT0001	AARONFIT0001	Yes	08/03/2015	16:34:28	07/24/15 3:47:33 PM

The following search fields are available for this report:

- **Value** – The value associated to this acceptance, either the last four digits of the card number and the expiration date, the payment number or the contract number.
- **Customer Number** – The customer identifier associated to the account
- **Type** – This dropdown contains the available types of agreements such as for agreements accepted for Payments or AutoPay Contracts
- **From/To Date** – These options can be used to filter the results based on the date the agreement was accepted

Once the search criteria is provided and the 'Search' button is clicked, the results will display in the table to show the following values:

- **Value** – The value associated to this acceptance either the last four digits of the card number and the expiration date, the payment number or the contract number.
- **User** – The username of the user who accepted the agreement
- **Customer Number** – The customer identifier associated to the account
- **Confirmed** – This column shows if the user had to mark the checkbox to confirm they read the agreement
- **Acceptance Date** – This column will show the date the user accepted the agreement
- **Acceptance Time** – This column will show the time the user accepted the agreement
- **Agreement Version** – This clickable link will show the agreement that was accepted by the user. The value in this column is determined based on the date and time the agreement template was saved.

2.5.12. System Information

This page contains the summary of ePay's system information such as product version, purchased modules and a high level overview.

System Information REFRESH

VERSION INFORMATION

Assembly File: 5.0.2.028

Modules: Online Bill Pay, Installment Payments, Recurring Invoicing, Recurring Payments, eSOP Advantage, Avatax, Payfabric

NODUS SERVICES

Transact Service: Working.

FAILED/ON-HOLD DOCUMENTS

Document Queue: 2 failed, 0 pending

Payment Queue: 0 failed

RB Invoice Contract: 0 on-hold

RB Payment Contract: 0 on-hold

Installment Contracts: 0 on-hold

REFRESH

Please refer to the chart below for description of each of the field for the system information:

Section	Field Name	Description
Version Information	Assembly File	The version number of ePay's development version and build.
	Modules	Currently enabled modules within ePay
Nodus Services	Encryption Service	Display current status of Nodus Key Encryption Service. This service is used to encrypt/decrypt credit card data on ePay. (Encryption Option Only)

	<i>Transact Service</i>	Display the current status of Nodus Transact Service. This service provides the communication between ePay and the back office ERP
<i>Failed/On-Hold Documents</i>	<i>Document Queue</i>	Display document status summary count from Document Queue
	<i>Payment Queue</i>	Display document status summary count from Payment Queue
	<i>RB Invoice Contract</i>	Display contract status summary count for Recurring Billing Invoice contracts.
	<i>RB Payment Contract</i>	Display contract status summary count for Recurring Billing Payment (AutoPay) contracts.
	<i>Installment Contract</i>	Display contract status summary count for Installment Payment contracts.

2.5.13. Error Logs Report


This page displays the error(s) that was logged for ePay website for any exceptions that occur on the website


The error report can be searched by error number or date range.

Error Logs

Report that lists all error logs in ePay

Error Number:

From Date: 

To Date: 

ERROR NUMBER	DATE	MESSAGE	SOURCE	ERROR CODE
31	4/30/2013 4:58 AM	Unable to restart scheduler group. Object reference not set to an instance of an object.	Unknown	0
30	4/30/2013 4:57 AM	Unable to restart scheduler group. Object reference not set to an instance of an object.	Unknown	0
29	4/30/2013 3:34 AM	Unable to restart scheduler group. Object reference not set to an instance of an object.	Unknown	0
28	4/30/2013 3:27 AM	Unable to restart scheduler group. Object reference not set to an instance of an object.	Unknown	0
27	4/30/2013 3:27 AM	Unable to restart scheduler group. Object reference not set to an instance of an object.	Unknown	0
26	4/30/2013 3:14 AM	Unable to restart scheduler group. Object reference not set to an instance of an object.	Unknown	0

2.6. Email Templates

2.6.1. Overview

ePay features various e-mail templates that can be sent based on certain events on the site. This section provides an overview of working with the e-mail templates on ePay from the email templates menu. In order for any email to be sent from ePay, the [Email Setup](#) tab of the 'Site Settings' page must be properly configured first.

New Invoice Import

From: ePay@nodus.com

BCC: CopyMe@nodus.com

Subject: New Invoice Available on ePay

Main Message Body:


Dear [[[CustName]]],

This email is being sent to inform you that a new invoice has been posted to your account with [[[CompanyName]]]. Below you will see the invoice number and amount:

Invoice Number: [[[InvoiceNumber]]] - Invoice Amount: [[[InvoiceAmount]]]

Variables: [[[InvoiceNumber]]]: Invoice Number
 [[[InvoiceAmount]]]: Invoice Amount
 [[[CompanyName]]]: Company Name
 [[[CompanyAddress]]]: Company Address

The following elements are available on each of the templates:

- From – This field should contain the address that the email will come from. **In order for the email to be sent, this field must be populated with a valid email address.**
- BCC – When the email is sent, the email will also be sent an email address in the BCC field. The actual recipient of the email will not be aware that the mail was copied to an additional address. Multiple addresses can be placed in this field as long as they are separated by a semicolon (;) character.
- Subject – This field should be populated a brief description of the email contents.
- Main Message Body – This is the content of the email. The editor contains various tools to assist in adding content to the email body.
 - Users knowledgeable with HTML can utilize the HTML view by clicking the  button to directly modify the HTML for the message body.
 - The pencil icon can be used to return to the design view.
- Variables – Below each template are the variables available for the email template. When these variables in the triple brackets are put into the Main Message Body, they will be updated with the proper content when the email is sent.


Working with Link Variables

Certain templates support a variable that can be added to the ePay website URL to provide a link that will handle certain functionality on the website. When using a link variable, the following structure should be used:

<ePaySiteAddress>/[[[LinkVariable]]]

example: https://ePay.com/[[[LinkVariable]]]

Please note that certain browsers will attempt to automatically convert the text into a hyperlink, but the link will stop before the three closing brackets. (Example: [https://epay.com/\[\[\[LinkVariable\]\]\]](https://epay.com/[[[LinkVariable]]])) This will break the variable in the HTML backend and it will not populate properly when the email is sent.

To avoid this, insert the full link at once using the insert link  button on the editor or modifying the HTML directly to ensure the variable is not broken.

2.6.2. Payment Confirmation Template

The 'Payment Confirmation' email is sent to the customer when a payment processed successfully from ePay. This email provides the customer with a receipt after their payment is completed.

Below the variables on this page is a section titled 'Message Invoice List' the HTML code in section will be populated into the `[[[InvoiceList]]]` variable when the payment is applied to invoices.

2.6.3. Payment Declined Template

The 'Payment Declined' email is sent to the customer account when a payment fails from ePay. For scheduled payments that are scheduled to be attempted multiple times, this email will only be sent after the last automated failure.

Similar to the 'Payment Confirmation' template, below the variables on this page is a section titled 'Message Invoice List' the HTML code in section will be populated into the `[[[InvoiceList]]]` variable when the payment is applied to invoices.

2.6.4. New User Welcome Template

The 'New User Welcome' email is sent after a new account has been registered to the site. This template can be used to provide the user with their username and direct them on how to utilize the website.

2.6.5. New Invoice Import Template

The 'New Invoice Import' email is sent to customers when a new outstanding invoice has been imported to the ePay website. This template can be used to direct the customer to log into ePay to pay their invoice.

The `[[[PayLinkURL]]]` variable is a [Link Variable](#) that can be included in this template to provide the customer with a link to make a payment without having to log into ePay by utilizing the [Express Pay](#) functionality of ePay.

(The PayLink URL variable is only available with the [Tokenization or PayFabric® Options of ePay](#))

2.6.6. Customer Registration Template

The 'Customer Registration' e-mail is sent to the customer to allow them to register for their account. See the [Customer Self Registration](#) section for more information on how this email can be sent to the customer. The `[[[RegisterLink]]]` variable is a [Link Variable](#) that will populate most of the account registration information when clicked.

2.6.7. Forgot Username Template

The 'Forgot Username' email is sent to the customer user when they utilize the [Forgot Username](#) functionality from the login page.

2.6.8. Forgot Password Template

The 'Forgot Password' email is sent to the customer user when they utilize the [Forgot Password](#) functionality from the login page. The `[[[ResetPasswordLink]]]` variable is a [Link Variable](#) that will direct the recipient of the email to a page where they can reset their password.

2.6.9. Reset Password Template

The 'Reset Password' email is sent to the customer user when their password is reset from the [Profile](#) page or by a CSR or Administrative user from the [Manage Users](#) page. This email is a simple notification to ensure the user is aware when their password is reset.

2.6.10. Recurring Billing Invoice Payment Declined Template

This option is only available with the [Recurring Billing](#) module of ePay

The 'Recurring Billing Invoice Payment Declined' email is sent when a payment by eCheck or credit card for a recurring invoice contract has been declined.

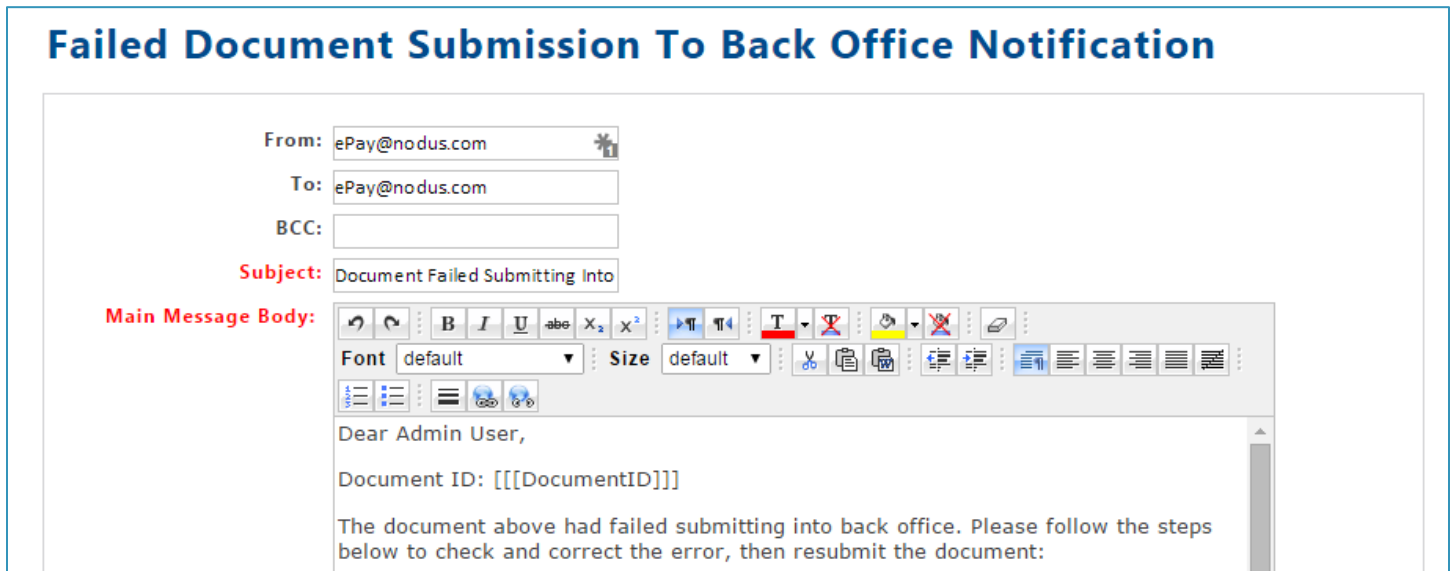
2.6.11. Past Due Invoices Reminder Template

This option is only available with the [Online Bill Pay](#) module of ePay

The 'Past Due Invoices Reminder' email is sent either automatically based on the configuration in the [Past Due Invoices Reminder Options](#) tab of the 'Feature Settings' page or manually by a CSR user on the [Account Summary](#) page.

2.6.12. Failed Document Submission to Back Office Notification Template

The 'Failed Document Submission to Back Office Notification' email will be sent when an ePay document is sent to the back office ERP and the document fails to be integrated. In addition to the standard email configuration, to utilize this template, the 'To' field must contain the email address of the recipient of this email. This email is designed to provide a notification to an administrative user to check the [Document Queue](#) to address the failed submission.



2.6.13. Key Service Down Template

This option is only available with the [Encryption](#) option of ePay

When the Encryption Key Service server is not accessible, ePay will be unable to encrypt or decrypt credit card data which means users would be unable to process transactions. Since this is a critical problem, this email should be configured to notify a user to address this issue. In addition to the standard email configuration, to utilize this template, the 'To' field must contain the email address of the recipient of this email.

2.6.14. Credit Card Expiration Warning Template

The 'Credit Card Expiration Warning' email can be sent automatically based on the configuration from the [Customer Wallet](#) tab of the 'Feature Settings' page or the [Credit Card Expiration Information](#) report.

2.6.15. CCA Transaction Notification Template

This option is only available with the [Tokenization](#) option of ePay

This template is used for sending a link from Credit Card Advantage (CCA) to allow customers to enter their credit card information from the web so the credit card information does not have to be entered by the user from the back office ERP. The [[[PayLinkURL]]] variable is a [Link Variable](#) that will provide the recipient with a link to make a payment without having to log into ePay by utilizing the [PayLink with Credit Card Advantage](#) functionality of ePay.

2.6.16. Express Pay Notification Template

This option is only available with the [Tokenization or PayFabric® Options](#) of ePay

The 'Express Pay Notification' email is used for sending a link from ePay to allow customers to make a quick one-time payment without having to login to ePay portal. This email is sent by a CSR or administrator user from the [Outstanding Invoices Report](#). The [[[PayLinkURL]]] variable is a [Link Variable](#) that will provide the recipient with a link to make a payment without having to log into ePay by utilizing the [Express Pay](#) functionality of ePay.

3. Customer and CSR Portal

3.1. Main Functionality

This section contains features available for the CSR and Customer portal that are available for all modules of ePay such as the Wallet and account management functionality.

3.1.1. Customer Self Registration

A customer can register for their ePay account by utilizing the register link in the [Customer Registration](#) e-mail as long as the 'Allow Customer Registration' is enabled from the [Customer Options](#) tab of the Back Office Settings page. Once the user clicks the link, they need to provide their desired e-mail, username and password to register.

From: MyePay@nodus.com Sent: Tue 4/15/2014 5:58 PM
 To: David Geli
 Cc:
 Subject: New Account Ready for Activation

Dear Happy Customer,

Your account is now available at our ePay Website for you to view your existing outstanding invoices and make payment. You can directly activate your account here:

<http://MyePayWebsite/Register.aspx?id=0881a316-9eb7-4510-b2cc-7e288fd548a2>

Or you can go to the ePay website <http://MyePayWebsite>, select 'REGISTER' option and go through the activation process. Below is your detailed account information from our records. This information is required in order to complete your account activation.

Customer Number: HAPPYCUSTOMER
 Phone Number: 5555555555
 Activation Code: 0881a316-9eb7-4510-b2cc-7e288fd548a2

Registration

Customer Number: HAPPYCUSTOMER
E-Mail:
User Name:
Password:
Confirm Password:
Registered Phone Number: 5555555555
Activation Code: 0881a316-9eb7-4510-b2cc-7e288fd548a2

[Request Activation Email](#)

The customer can receive the Customer Registration in three ways.

1. **Automatic** – The email can automatically be sent to any new customers imported to ePay with an email address or when an email address is added to a customer who previously did not have one. The 'Enable Automatic Customer Registration E-mail' option must be enabled from the [Customer Options](#) tab of the Back Office Settings page for this e-mail to automatically be sent.
2. **Manual** – An administrator or CSR User with Group Permission can manually send this e-mail from the [Register Customer](#) page. This e-mail can also be sent in mass to customers who have not yet registered
3. **Self Service** – The customer can request the registration e-mail from ePay's Login page by clicking the 'Register' button, then the 'Request Activation Email' link. They then can provide their customer number to have the Activation Email automatically sent to them. If 'Require E-mail for

Requesting Activation code' is enabled from the [Customer Options](#) tab of the Back Office Settings page, then the customer's assigned e-mail address will be required as well.

The screenshot illustrates the user flow for requesting an activation code. It is divided into three numbered steps:

- Step 1: Login to ePay** - Shows the login form with fields for User Name and Password. A blue LOGIN button and a green REGISTER button are present. A link for "Forgot your password?" is also visible.
- Step 2: Registration** - Shows the registration form with fields for Customer Number, E-Mail, User Name, Password, Confirm Password, Registered Phone Number, and Activation Code. A blue SUBMIT button is at the bottom right. A yellow highlight is placed on the "Request Activation Email" link.
- Step 3: Request Activation Email** - Shows a form titled "Request Activation Email" with the instruction "Enter Customer Account Number to request a copy of Account Activation Email". A text input field contains "HAPPYCUSTOMER". Blue CANCEL and SUBMIT buttons are at the bottom.

3.1.2. Forgot Username

Users who forget their username can click the 'Forgot your username?' link on the ePay login screen to request that their username be emailed to them. For validation, the user must provide the customer account ID and their e-mail address to receive the email. This functionality requires that the [Forgot Username](#) e-mail is configured to be sent.



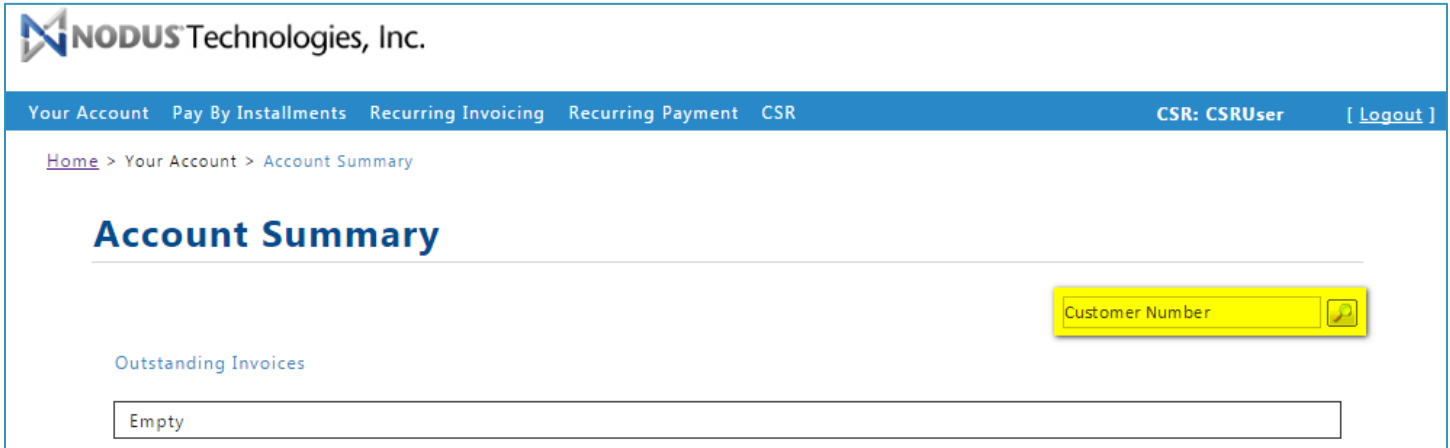
3.1.3. Forgot Password

Users who forget their password can click the 'Forgot your password?' link on the ePay login screen to request to reset their password. For validation, the user must provide their User Name and the registered account phone number to receive the email. Once the user receives the email, the email will contain a link so the user can reset the password. This functionality requires that the [Forgot Password](#) e-mail is configured to be sent.



3.1.4. CSR View

Upon logging into ePay, the CSR User will generally see a page without any loaded information. The first action they must take is to select a customer user from the customer lookup. To select a customer, the CSR user must type the customer number into the lookup in the upper right area of the page or click the magnifying glass and use the 'Customer Lookup' page to search for the desired customer. Most all functionality for customer users is available for the CSR user unless noted otherwise.




NODUS Technologies, Inc.

Your Account Pay By Installments Recurring Invoicing Recurring Payment CSR CSR: CSRUser [Logout]

Home > Your Account > Account Summary

Account Summary

Customer Number 

Outstanding Invoices

Empty

3.1.5. Profile (Customer)

(Your Account > Profile)

The Profile page can be used review the account address and update the e-mail and password associated to the ePay account. If any changes are made on this page, the 'Save' button should be used to apply the changes to the account.

Profile

Aaron Fitz Electrical

PRIMARY ADDRESS

Contact:

Street:

Street 2:

City:

State:

Zip Code:

Country:

UPDATE EMAIL

Email Address:

[SAVE](#)

RESET PASSWORD

New Password:

Confirm Password:

[SAVE](#)

3.1.6. Wallet

(Your Account > Wallet)



The Wallet page is where the credit cards and eCheck account information saved to the customer account can be managed.

Wallet

ACTION	TENDER TYPE	ACCOUNT NUMBER	EXP DATE/ROUTING #
	Discover	XXXXXXXXXXXX1117	12/2018
	MasterCard	XXXXXXXXXXXX4444	12/2016
	Visa	XXXXXXXXXX2222	12/2016
	Visa	XXXXXXXXXXXX1111	12/2016

[Add New Entry](#)

The following functionality is available on this page:

- **Add New Entry** – A wallet entry can be added to the wallet by clicking the ‘Add New Entry’ link.
 - If ‘Require Customer Confirmation for New Wallet Entry’ is enabled on the ‘[Customer Wallet](#)’ tab of the ‘Terms And Conditions Agreement’ administrative page, the customer user would be required to accept the Terms and Conditions by marking a checkbox in order to save new the wallet entry. (Encryption and Tokenization options only)
- **Edit** – A wallet entry can be modified by using the edit pencil icon ().
 - If ‘Require Customer Confirmation for Wallet Modifications’ is enabled on the ‘[Customer Wallet](#)’ tab of the ‘Terms And Conditions Agreement’ administrative page, the customer user would be required to accept the Terms and Conditions by marking a checkbox in order to save the changes to the wallet. (Encryption and Tokenization options only)
- **Delete** – A wallet entry can be deleted by utilizing the delete trash can icon ().
 - If ‘Allow Remove Primary Wallet’ is disabled from the ‘[Customer Wallet](#)’ tab of the ‘Feature Settings’ page, then the delete icon will not appear for the primary default wallet.

3.1.7. Manage Additional Logins

(Your Account > Manage Additional Logins)

To help manage log-in information for a single customer account with multiple users who need to sign onto ePay, the **Manage Additional Logins** page provides functionality to look-up, edit and delete login accounts. This page can only be accessed by logging on as the first user who registered an account under the customer account or a CSR user.

Manage Additional Logins

Login ID:

Max Results:

[Create Account](#)

LOGINID	FIRST NAME	LAST NAME	EMAIL ADDRESS	ACTION
AARONFIT2			test@test.com	Edit Delete

Some of the functionality on this page includes:

Create Account – Clicking this text will direct the user to a page where they can provide the account credentials to create a new login

Edit – Clicking this text will direct the user to a page where they can modify the account information

Delete – Clicking this text will delete the additional login

3.1.8. Profile (CSR)

(CSR > Profile)

The CSR User can use the Profile page under the CSR menu to update their e-mail address, password and name. After the desired changes are made on this page, the 'Save' button can be used to save the changes.

Profile

Email Address:	<input type="text" value="David.Geli@nodus.com"/>	<input type="button" value="SAVE"/>
Current Password:	<input type="password"/>	<input type="button" value="SAVE"/>
New Password:	<input type="password"/>	
Confirm New Password:	<input type="password"/>	
First Name:	<input type="text" value="CSR"/>	<input type="button" value="SAVE"/>
Last Name:	<input type="text" value="User"/>	

3.2. Online Bill Pay

The features in this section are only available with the [Online Bill Pay](#) module of ePay unless otherwise noted.

3.2.1. Account Summary

The Account Summary page provides an overview of the customer account in 3 main sections

- **Outstanding Invoices**
 - The first portion of this section shows a quick summary of the account.
 - If the customer has an outstanding credit balance available, the 'View Available Credit' button can be clicked to direct the user the [Apply Existing Credit](#) page.

- If the customer has a past due balance, a CSR user will see the 'Send Reminder' button in this section which can be used to send the customer a [Past Due Invoice Reminder](#) email.
- The table in this section provides an overview of 5 recent outstanding invoices. Each of the Invoice numbers can be clicked to show the full invoice details. To view all of the outstanding invoices, the 'View All Open Invoices' link can be clicked to direct the user to the [Outstanding Invoices](#) page.
- **Payment History**
 - This section provides an overview of the top 5 recent payments. Each of the Payment Numbers can be clicked to provide a detailed view of the payment. For a more detailed payment history, the 'View All Payment History' link can be clicked to direct the user to the [Payment History](#) page.
- **Scheduled Payments**
 - This section provides an overview of the top 5 recent scheduled payments. Each of the Payment Numbers can be clicked to provide a detailed view of the payment. To further manage the scheduled payments, the 'View Complete List' link can be clicked to direct the user to the [Scheduled Payments](#) page.

Account Summary

ALTONMAN0001 
Alton Manufacturing

Outstanding Invoices

TOTAL BALANCE DUE:	\$68,805.00	SEND REMINDER
TOTAL AVAILABLE CREDIT:	\$0.00	VIEW AVAILABLE CREDIT
NET BALANCE:	\$68,805.00	

INVOICE #	DATE	DUE DATE	TOTAL	BALANCE DUE
SLS11116	1/30/2014	3/1/2014	\$29,591.80	\$29,441.80
SLS11114	1/26/2014	2/25/2014	\$15,896.25	\$15,896.25
SLS11013	1/23/2014	2/22/2014	\$30,839.11	\$23,466.95
				View All Open Invoices

Payment History

PAYMENT NUMBER	TYPE	DATE	AMOUNT
PMT11017	Payment	1/30/2014	\$6,819.23
PMT11005	Payment	1/29/2014	\$27,138.56
PMT11002	Payment	1/20/2014	\$13,535.23
PYMNT00000000396	Payment	5/29/2013	\$21.20
WEBPMT0000000166	Payment	5/29/2013	\$150.00
			View All Payment History

Scheduled Payments

SCHEDULED DATE	PAYMENT NUMBER	AMOUNT	PROCESS STATUS	SOURCE
5/5/2014	WEBPMT0000000275	\$441.00	Scheduled	Regular
				View Complete List

3.2.2. Outstanding Invoices

(Your Account > Invoices > Outstanding Invoices)

The Outstanding Invoices page is used to begin a payment against outstanding invoices or a prepayment.

Outstanding Invoices

Note: Outstanding Invoices include any charges on a customer account that is not paid in full, such as: invoices, debit memos, service charges, etc.

Show Transactions by Transaction Date 1 All From:

Filter by Currency Show All 2 To:

Max Results: 200 3

SEARCH RESET

Clear Selected Select All

TRANSACTION# 4	TRANSACTION DATE	DUE DATE	TRANSACTION AMOUNT	BALANCE DUE	PAY IN FULL 6	AMOUNT 7
STDINV2330 5	4/12/2017	5/12/2017	C\$53.50	C\$53.50	<input type="checkbox"/>	
SLS11074	1/27/2014	2/26/2014	\$5,718.44	\$5,702.45	<input checked="" type="checkbox"/>	5702.45

8 Export

SELECTED TRANSACTIONS 9

TRANSACTION #	TRANSACTION BALANCE	PAYMENT(S)
SLS11074	\$5,702.45	\$5,702.45
		SUBTOTAL:\$5,702.45

PROCESS PREPAYMENT 10

Note: Use this section to enter an additional payment on account.

COMMENT	PAYMENT
<input style="width: 95%; height: 35px;" type="text"/>	<input style="width: 80%; border: 1px solid #ccc;" type="text" value="\$0.00"/>

TOTAL: \$5,702.45

PAY 11

This page contains the following features as referenced in the above image:

1. **Show Transactions** – This dropdown has the options to sort the transaction By Transaction Date or by Transaction Number. Once the option has been selected, the 'From' radio button can be clicked to enable the fields to search for a certain range of invoices.
2. **Filter By Currency** – This dropdown menu will only appear if the customer has invoices in multiple currencies. The value selected here will filter the list in the invoice table.
3. **Max Results** – This dropdown will limit the number of invoices shown in the invoice table
4. **Invoice table** – This table will show the currently outstanding invoices on the customer account. The column header in most of the columns can be clicked to sort the items in the table based on the clicked column.

5. **Transaction Number column** – The invoice number displayed in this column can be clicked to show a detailed view of the invoice.
6. **Pay In Full Checkbox** – This checkbox should be marked for any invoices that user want to pay off completely
7. **Amount field** – If the user wishes to provide a partial payment, they can enter the amount to pay in this field.
 - a. This feature can be disabled from the [Payment](#) tab of the 'Feature Settings' administrative page by unmarking the 'Allow Partial Payment' option.
8. **Export text** – Clicking this text will download the list of outstanding invoices to a .CSV file.
9. **Selected Transactions list** – This list will show the invoices selected for payment
10. **Process Prepayment section** – This section can be used to enter an additional amount for a prepayment. A comment can also be applied to the payment as well from this section.
 - a. This feature can be disabled from the [Payment](#) tab of the 'Feature Settings' administrative page by unmarking the 'Allow Prepayment' option.
11. **Pay Button** – Clicking this button will direct the user to the [Review & Pay](#) page to select a payment method and complete their payment.

3.2.3. Process Prepayment

(Your Account > Invoices > Process Prepayment)

The Process Prepayment page can be used to take an advanced payment from customers that would not be associated to any invoice. This feature can be disabled from the Payment tab of the 'Feature Settings' administrative page by unmarking the 'Allow Prepayment' option.

Process Prepayment

Prepayment Amount	<input type="text" value="\$15.00"/>	<input type="button" value="PAY"/>
Currency	<input type="text" value="\$"/>	
Comment	<input type="text" value="I'm so happy to pay early!"/>	

The following items are available on this page:

Payment Amount – The desired amount for the prepayment should be entered here

Currency – The desired currency for the prepayments should be selected. This option would only be shown if multiple currencies are configured for payment on the [Multicurrency Settings](#) administrative page.

Comment – A comment can be added here for the payment

Pay Button – Clicking this button with the payment amount provided will direct the user to the [Review & Pay](#) page to select a payment method and complete their payment.

3.2.4. Review & Pay

The Review and Pay Page is where the user is directed to select their payment method and complete their payment.

Review & Pay

SELECTED TRANSACTIONS ①

TRANSACTION #	TRANSACTION BALANCE	PAYMENT(S)
STDINV2341	\$10.70	\$10.70
STDINV2252	\$5,194.69	\$79.30
PREPAYMENT AMOUNT		\$10.00
SERVICE FEE* ②		\$2.00

TOTAL: \$102.00

PAYMENT OPTIONS ③

Note: The bolded line is primary wallet entry for either credit card or eCheck.

SELECT	TENDER TYPE	ACCOUNT NUMBER	EXP DATE/ROUTING #
<input checked="" type="radio"/>	Visa	XXXXXXXXXXXX1111	12/2016
<input type="radio"/>	ECheck	XXXXXX0999	XXXXXX0999

④ Add New Entry +

⑤ **Pay Now**

⑥ **Pay Later**


⑦ *A service fee of 2.00% will be applied to this payment

⑧ [Review Terms and Conditions](#)

I accept the terms and conditions of the above agreement

⑨ **CANCEL** **SUBMIT** ⑩

This page contains the following features as referenced in the above image:

1. **Selected Transactions section** – The Selected transaction provides a review of the items that will be paid for with this transaction including any additional prepayment.
2. **Additional Fee** – The Additional Fee Name will appear if the currently selected payment option is enabled from the Online Bill Pay portion of the [Additional Fee](#) tab of the 'Feature Settings' administrative page.
3. **Payment Options section** – The available saved wallet entries will be shown in this section to be selected for payment. With the PayFabric option, the edit pencil icon () can be used to edit an existing wallet entry.
4. **Add New Entry** – Clicking this option will present the option to add a new wallet entry.
5. **Pay Now option** – Selecting this option will result in the payment being made once the 'Submit' button is clicked
6. **Pay Later option** – If this option is selected, the user can select a date they would prefer the payment be made on. This option can be disabled by unmarking the 'Pay Later' option from the [Payment](#) tab of the 'Feature Settings' administrative page.
7. **Additional Fee Message** – The Additional Fee Message will appear if the currently selected payment option is enabled from the Online Bill Pay portion of the [Additional Fee](#) tab of the 'Feature Settings' administrative page.
8. **Terms and Conditions** – If the 'Show Agreement' option from the [Payment](#) tab of the 'Terms and Conditions' administrative page is enabled the link to review the agreement will be shown. The checkbox required by the customer to mark shown based on the configuration from the [Payment](#) tab of the 'Terms and Conditions' administrative settings page. This checkbox will only be presented to Customer users.
9. **Cancel button** – Clicking this button will return the user to the previous page
10. **Submit Button** – Clicking this button will confirm the transaction.
 - a. If the 'Pay Now' option was selected the transaction will be processed immediately
 - i. If the transaction is approved, then the user will be directed to a payment confirmation page
 - ii. If the transaction was denied, the user will be returned to the 'Review & Pay' page with the error message to assist in the explanation for the reasoning for the transaction fail.
 - b. If the 'Pay Later' option was selected, the user will be directed to a payment confirmation page and the payment will be processed on the selected date

3.2.5. Paid Transactions (Invoice History)

(Your Account > Invoices > Paid Transactions)

The 'Paid Transactions' page will display the list of invoices that have already been paid.

Paid Transactions

Note: Paid Transactions include all charges to a customer account that are paid in full, such as: invoices, debit memos, service charges, etc.

Show Transactions by Transaction Date All From:

Filter by Currency Show All To:

Max Results: 200 Source: Any

TRANSACTION #	SOURCE	TRANSACTION DATE	TRANSACTION AMOUNT
SLS11072	RM	1/16/2014	\$10,212.30
SLS1022	RM	12/16/2013	\$1,186.19
SLS1021	RM	11/8/2013	\$2,189.68

The following options are available on this page to sort and filter the presented data:

- Show Transactions** – This dropdown has the options to sort the transaction By Transaction Date or by Transaction Number. Once the option has been selected, the 'From' radio button can be clicked to enable the fields to search for a certain range of invoices.
- Filter By Currency** – This dropdown menu will only appear if the customer has invoices in multiple currencies. The value selected here will filter the list in the invoice table.
- Max Results** – This dropdown will limit the number of invoices shown in the invoice table
- Source** – The selected value will filter the list of invoices based on the 'Source' column
- Invoice table** – This table will show the paid invoices on the customer account. The column header can be clicked to sort the items in the table based on the clicked column. The individual invoices in the 'Transaction #' column can be clicked to present the details of the invoice.

3.2.6. Payment History

(Your Account > Payment History)

The Payment history provides a list of all payments, credits and returns on a customer's account.

Payment History

Note: Payment History includes fully applied Payments, Credits and Return Transactions.

Show Transactions: by Transaction Date ▼

Filter by Currency: Show All ▼

All From:

To:

Max Results: 200 ▼

SEARCH
RESET

TRANSACTION #	TRANSACTION TYPE	TRANSACTION DATE	TRANSACTION AMOUNT
WEBPMT8000000020	Payment	8/11/2015	\$1.02
WEBPMT8000000019	Payment	8/11/2015	C\$1.02
INV1013	Return	5/27/2014	\$1,016.24
PMT11055	Payment	1/30/2014	\$2,203.71
PMT11053	Payment	1/21/2014	\$4,059.33
CM11071	CreditMemo	1/8/2014	\$799.23
PMT11050	Payment	1/5/2014	\$2,111.20

The following options are available on this page to sort and filter the presented data:


1. **Show Transactions** – This dropdown has the options to sort the transaction By Transaction Date or by Transaction Number. Once the option has been selected, the 'From' radio button can be clicked to enable the fields to search for a certain range of payments.
2. **Filter By Currency** – This dropdown menu will only appear if the customer has payments in multiple currencies. The value selected here will filter the list in the payment table.
3. **Max Results** – This dropdown will limit the number of payments shown in the payment table
4. **Payment table** – This table will show the paid payments on the customer account. The column header can be clicked to sort the items in the table based on the clicked column. The individual payments in the 'Transaction #' column can be clicked to present the details of the payment.

3.2.7. Apply Existing Credit

(Your Account > Invoices > Apply Existing Credit)

To apply an existing credit to an open balance, open the **Apply Existing Credit** page to view a list of documents where an existing credit exists.

Apply Existing Credit


CHUNG0001 
STBN Broadcasting

Document Type: Max Results:

SELECT DOCUMENT	DOCUMENT #	DOCUMENT DATE	DOCUMENT TOTAL	APPLIED AMOUNT	UNAPPLIED AMOUNT
<input type="button" value="SELECT THIS"/>	STDINV2348	4/12/2017	\$20.00	\$0.00	\$20.00

1. Click the **Select this** button to choose a document to be used to apply against an outstanding invoice.
2. The **Outstanding Invoices** page opens to display current open invoices

Outstanding Invoices

CHUNG0001 
STBN Broadcasting

Show Transactions All From: To: Max Results:

Applied Amount: \$0.00
Unapplied Amount: \$20.00

[Select All](#)

TRANSACTION#	CUSTOMER PO #	TRANSACTION DATE	DUE DATE	TRANSACTION AMOUNT	BALANCE DUE	PAY IN FULL	PAYMENT AMOUNT
STDINV2351		5/1/2013	6/14/2013	\$40.00	\$40.00	<input type="checkbox"/>	<input type="text"/>

[Export](#)

SELECTED TRANSACTIONS

TOTAL: \$0.00

3. If the credit balance is the same amount or larger than the open invoice to be chosen, mark the **Pay in full** checkbox

-OR-

Enter the amount of the existing credit to be applied towards the open invoice in the **Amount** textbox

NOTE: Multiple invoices can be selected if the total is not larger than the credit to be applied.

4. Click the **Pay** button

CHUNG0001
 STBN Broadcasting

SELECTED TRANSACTIONS

TRANSACTION #	TRANSACTION BALANCE	PAYMENT(S)
STDINV2351	\$40.00	\$2.00

Applied Credit Details

DOCUMENT #	DATE	TOTAL	APPLIED AMOUNT	UNAPPLIED AMOUNT
STDINV2348	4/12/2017 11:59:00 PM	\$20.00	\$2.00	\$18.00

Confirm

5. A confirmation page opens that will show two elements:
 - The selected invoice(s) with their original balance and the amount to be applied towards that balance
 - The original existing credit and the amount being applied towards the invoice – and the remaining credit balance from the credit document
6. If the information is correct, click the **Confirm** button
7. An **Applied Credit Receipt** window will open and the user is returned to the **Existing Credit** page if more credit transactions need to be processed.

Nodus Technologies, Inc.
 2099 S. State College Blvd
 Suite 250
 Anaheim, CA 92806

Customer Number: CHUNG0001 Customer Name: STBN Broadcasting Payment Number: STDINV2348	Applied Date: 5/1/2013 Applied Credit Amount: \$2.00 Unapplied Credit Amount: \$18.00
---	--

Applied Invoice List

INVOICE #	APPLIED AMOUNT	REMAINING BALANCE
STDINV2351	\$2.00	\$38.00

3.2.8. Scheduled Payments

This page is available with either the Online Bill Pay, Installment Payments or AutoPay modules

(Your Account > Scheduled Payments)

The 'Scheduled Payments' page is used to manage payments that have been scheduled either using the 'Pay Later' feature, from an AutoPay contract or from an Installment contract.

Scheduled Payments

ADAMPARK0001 
Adam Park Resort

ACTION	SCHEDULED DATE	PAYMENT NUMBER	AMOUNT	PROCESS STATUS	SOURCE
Cancel	5/31/2013	WEBPMT0000000143	\$880.00	Scheduled	Regular
	8/7/2012	WEBPMT0000000069	\$22.97	Scheduled	Installment
	8/7/2012	WEBPMT0000000068	\$5.67	Scheduled	Installment

* Installment payments cannot be cancelled.

The following options are available on this page:

- Action column** – This column contains actions that can be performed against the scheduled payments
 - Cancel** – Payments scheduled through 'Pay Later' or from AutoPay contracts can be cancelled as needed. Payments from Installment contracts cannot be cancelled.
 - Reprocess** – Failed payments can be reprocessed by clicking the 'Reprocess' underlined text in the 'Action' column.
- Payment Number Column** – The value in the 'Payment Number' column can be clicked to show a more detailed view of the payment.

3.2.9. Parent Account Functionality

When viewing the Online Bill Pay module pages as a Parent Account many of the tables will be modified to show invoices or payments for children accounts as well as for the parent accounts.

Paid Transactions

Show Transactions All From: To: Max Results:

Account Filter

ACCOUNT	NAME	TRANSACTION #	TRANSACTION DATE	TRANSACTION AMOUNT
COMPUTER0001	Computerized Phone Systems	SLS6010	5/29/2013	\$7,013.41
COMPUTER0002	Computers Unlimited	SVC12082	1/19/2014	\$233.24
COMPUTER0002	Computers Unlimited	SLS2025	6/13/2013	\$1,592.06
COMPUTER0003	Computer Equipment Leasing	SLS14095	1/29/2014	\$3,486.57

An 'Account Filter' button will be available for most of the Online Bill Pay pages. The Account Filter allows the parent customer to limit their view to certain child accounts.

Account Filter

Select the desired accounts to view

Keyword: SEARCH

[Select All](#) [Clear All](#)

SHOW	CUSTOMER NUMBER	NAME	EMAIL
<input checked="" type="checkbox"/>	COMPUTER0001	Computerized Phone Systems	David.Geli@nodus.com
<input checked="" type="checkbox"/>	COMPUTER0002	Computers Unlimited	
<input type="checkbox"/>	COMPUTER0003	Computer Equipment Leasing	

Show Selected Accounts

Clicking the 'Show Selected Accounts' button will filter the Online Bill Pay pages to only include the selected accounts from the account filter.

On the Outstanding Invoices page, the table of invoices is modified to allow for a Parent customer can make a single combined payment across child accounts. The Parent Account can use the Hide Details or View Details link to expand the invoices for a single child account or pay all of a child's invoices at once using the 'Select All' checkbox.

TRANSACTION#	TRANSACTION DATE	DUE DATE	TRANSACTION AMOUNT	BALANCE DUE	PAY IN FULL	AMOUNT
My Account: COMPUTER0001 - Computerized Phone Systems Hide Details			7 Invoice(s) for \$16,095.54	Select All:	<input type="checkbox"/>	
INVSP1003	4/12/2017	5/12/2017	\$128.35	\$120.00	<input checked="" type="checkbox"/>	120.00
SLS6015	12/13/2013	1/12/2014	\$8,116.67	\$8,106.67	<input type="checkbox"/>	<input type="text"/>
SLS6014	11/13/2013	12/13/2013	\$2,724.08	\$2,724.08	<input type="checkbox"/>	<input type="text"/>
SLS6013	10/14/2013	11/13/2013	\$2,342.11	\$2,342.11	<input checked="" type="checkbox"/>	2342.11
SLS6012	9/5/2013	10/5/2013	\$1,867.25	\$1,867.25	<input type="checkbox"/>	<input type="text"/>
SRV6002	8/14/2013	9/13/2013	\$409.22	\$409.22	<input type="checkbox"/>	<input type="text"/>
SLS6011	7/3/2013	8/2/2013	\$526.21	\$526.21	<input type="checkbox"/>	<input type="text"/>
Account: COMPUTER0002 - Computers Unlimited View Details			6 Invoice(s) for \$4,849.58	Select All:	<input checked="" type="checkbox"/>	
Account: COMPUTER0003 - Computer Equipment Leasing View Details			4 Invoice(s) for \$6,849.29	Select All:	<input type="checkbox"/>	

[Export](#)

3.2.10. Express Pay

This page is only available with the [Tokenization](#) option of ePay with the [PayFlowPro Gateway](#) or the [PayFabric® Option](#)

The Express Pay page is used to allow a user to make a quick payment on ePay without having to log into the website. To access this page, the user must receive and click the link to the express pay page. This link can be delivered to the user in two ways:

- **Automatically:** This link can be included in the [New Invoice Import](#) email that is sent to the customer account email when their outstanding invoice is sent to ePay
- **Manually:** This link can be manually sent to the customer in the [Express Pay Notification](#) email from the [Outstanding Invoices Report](#) page.

1 VERIFY PAYMENT INFORMATION

Document Number: [STDINV2341](#)

Transaction Date: 4/12/2017

Date Due: 5/12/2017

Balance Due: \$10.70

2 VERIFY BILLING INFORMATION

City: *

State:

Zip Code:

Country:

Address 1:

Address 2:

Address 3:

Phone:

[Review Terms and Conditions](#)

I accept the terms and conditions of the above agreement

Credit Card
 E-Check

3 ENTER PAYMENT INFORMATION

Payment Information

Card Number *

Exp. Date * CW2 *

First Name * Middle Initial Last Name *

From the Express Pay page, the can utilize the following process to make their payment.

1. **Verify Payment Information** – The user can review the invoice at a glance, or click the magnifying glass icon to view the full details of the invoice.
2. **Verify Billing information** – The user can review the billing information for this transaction. This section will automatically be populated with the customer's assigned billing address. The user must also determine if the payment method will be utilizing a credit card or eCheck banking information and click the 'Continue' button to proceed.

- a. If the 'Show Agreement' setting is enabled from the [Express Payment](#) tab of the 'Terms and Conditions' administrative settings page, the Terms and Conditions agreement will be displayed in this section. The user must mark a checkbox to confirm they read the agreement if the 'Require Customer Confirmation' option is enabled from the settings.
3. **Enter Payment Information** – This section will have the entry fields for the account information and the button to complete the transaction.

Once the payment has been processed successfully, customer is presented with the payment confirmation page and if configured, the [Payment Confirmation](#) e-mail can be sent to the customer at this time.

3.3. Installment Payments

This option is only available with the [Installment Payments](#) module of ePay

3.3.1. New Installment Payment Plan

(Pay by Installments > New Payment Plan)

Only a CSR User can create a new installment plan. The following fields are available when creating a new Installment Contract.

FIELD	DESCRIPTION
Memo	A field for providing a quick reference to the contract
Customer #	The Customer Identifier, this field is automatically populated based on the currently selected customer from the Customer Lookup in the upper right corner.
Invoice #	The magnifying glass icon can be used to select an outstanding invoice to be assigned to an installment payment contract. The Invoice Total and Balance will automatically be displayed after the invoice is selected
Down Payment Amount	The amount for the initial payment for the installment contract
Annual Interest Rate	The percentage of interest to be added for the installments
# of Payments	The number of payments for the installment plan.
Payment Frequency	The frequency of payments for the installment plan. The options Weekly, Bi-Weekly, Monthly, Quarterly and Annually are available.
Interest Type	The Interest Type for the installment plan Simple – Interest is calculated based on the principal amount Compound – Interest is calculated based on the principle amount and the accumulated interest of previous periods
Down Payment Date	The date the initial payment will be made
First Installment Date	The date the first installment payment will be made

Wallet ID	Using the Magnifying Glass icon, the payment method for the installment contract can be selected. If no payment methods are available, the 'Create a new wallet' option can be utilized to add a new payment method.
Payment Setup ID	Click the Magnifying Glass icon to select the payment gateway account that will be utilized during processing. This option can be enabled or disabled from the Installment Payment Settings page.
Calculate Button	If all the previous fields have already been populated, clicking this button will calculate the principal amount and the installment amount
View Amortization	If all the previous fields have already been populated, clicking this button will open an amortization table of the installment plan.


Installment Payment Plan


ADAMPARK0001 

Adam Park Resort


Memo:

Customer #: ADAMPARK0001 Adam Park Resort

Invoice #: 



Down Payment Date: 

Invoice Total: \$2,535.76


First Installment Date: 

Invoice Balance: \$2,535.76


Down Payment Amount:


Wallet ID:  

Annual Interest Rate: %

Payment Setup ID: 

of Payments:

Payment Frequency: 

Interest Type: 

CALCULATE **VIEW AMORTIZATION**

Principal: \$2,000.00

Installment Amount: \$338.21

SAVE

Sample Amortization Table:

Installment Amortization Schedule

#	DATE	AMOUNT	PRINCIPAL	INTEREST	PRINCIPAL TO DATE	INTEREST TO DATE	BALANCE	PAYMENT NUMBER
1	5/2/2013	\$338.21	\$329.88	\$8.33	\$329.88	\$8.33	\$1,670.12	
2	6/2/2013	\$338.21	\$331.25	\$6.96	\$661.13	\$15.29	\$1,338.87	
3	7/2/2013	\$338.21	\$332.63	\$5.58	\$993.76	\$20.87	\$1,006.24	
4	8/2/2013	\$338.21	\$334.02	\$4.19	\$1,327.78	\$25.06	\$672.22	
5	9/2/2013	\$338.21	\$335.41	\$2.80	\$1,663.19	\$27.86	\$336.81	
6	10/2/2013	\$338.21	\$336.81	\$1.40	\$2,000.00	\$29.26	\$0.00	

Additional Payments

3.3.2. View Installment Contracts

(Pay By Installments > View Installments)

The 'View Installments' page can be used to view the installment contracts associated to the customer account.

The 'Details' link in the 'View' column can be utilized to review the details on an Installment Contract
 The 'Payment' link in the 'View' column can be used to view a table of the individual payments made against an installment contract. The individual payment number can be clicked to view further detail on a specific payment.

View Installments

Adam Park Resort

Keyword:

From:

To:

Max Results:

Status:

CONTRACT	CREATED DATE	TERMS	BILLING PERIOD	RATE	TOTAL	STATUS	VIEW
WSPC000010	5/2/2013	6	Monthly	5.00%	\$2,000.00	Active	Details Payments
WSPC000002	5/4/2012	4	Monthly	10.00%	\$90.00	Closed	Details Payments
WSPC000001	5/4/2012	4	Monthly	10.00%	\$22.21	Closed	Details Payments

3.3.3. Edit Installment Payment Contract

The following procedure can be used to edit an existing Installment Payment Contract.

1. Navigate to the **View Installments** page (Pay By Installments > View Installments)
2. Click on the **Details** link for a specific contract
3. Scroll down the Installment Payment Plan screen and click on the **Edit** button
4. A customer user will only be able to edit the wallet associated to the Installment Contract. A CSR User will have additional options to manage the contract such as the ability to modify the status, Payment Setup ID and the Memo fields.
5. Click the **Save** button to apply the changes.

3.4. Recurring Billing

This option is only available with the [Recurring Billing](#) module of ePay

3.4.1. Create a Recurring Invoice Billing Contract

(Recurring Invoicing > New Invoice Contract)

Setting up a recurring billing invoice contract allows the CSR (and only the CSR) to create a Recurring Invoice Contract for products that can be edited at the retail website owner's convenience. This is an optional feature.

To open a new recurring billing invoice contract:

1. Log onto the site as a CSR and navigate to the **New Invoice Contract** page
2. Fill in the appropriate fields as detailed in the accompanying table

Field	Description
Customer ID	Click the Select a Customer Lookup Icon on the upper right (just below the page title) and choose the customer that signed up for the recurring billing. Choosing a customer will automatically populate both Customer fields
Memo	This text box permits a brief description of the transaction ID
Line items have different dates and frequencies	Mark the checkbox if line items have different billing dates and/or frequencies. See the section on Assign Different Start/End Bill Dates to Multiple Items for more information.
First Invoice Date	Click the calendar icon to set the beginning date for the invoice. NOTE: This field will not be available if the Line Items have different start dates and frequencies checkbox is marked.
End Date	If desired, choose an end date NOTE: If the recurring billing contract is to extend indefinitely, leave this field blank
Frequency	Choose a time period for the customer to be billed NOTE: This field will not be available if the Line Items have different start dates and frequencies checkbox is marked.


Contract Class ID	Select a contract class as established in GP
Default Site ID	The default identification number associated with the website
DOCUMENT OPTIONS TAB	INPUT
Customer #	Customer name and identification number
Doc Type	The drop-list provides an option to choose between and order or invoice for the document type
Type ID	Non-editable, this display shows the type ID associated with a type of ID established in GP
Shipping Method	Choose a shipping method from the drop list
Payment Terms	Choose a payment term from the drop list
Tax Schedule	From the drop list, choose a Tax Schedule ID. This list is populated from Dynamics GP. If the products on the invoice are tax exempt, mark the Tax exempt checkbox
Shipping Address	Click the Shipping icon to choose from shipping addresses established in Dynamics GP
Billing Address	Click the Billing icon to choose from billing addresses established in Dynamics GP
LINE ITEMS TAB	INPUT
Line Items tab	<p>In the Line Items tab, most of the fields are editable. For example, the unit price or description can be changed on the form.</p> <ol style="list-style-type: none"> 1. Click the Line Items tab 2. Click the Lookup icon 3. Click on the line for item to be added 4. Enter the amount of product in the Quantity text box 5. Repeat for each item
Item Code	The code to identify the item
Quantity	Enter the amount of the item desired

Description	Provides a brief summary of the product item. This description is changeable in the Description textbox.
UofM (Unit of Measure)	Allows the CSR to choose a unit of measure, such as a single item or a case. The U of M type is established in Dynamics GP.
Unit Price	The price level for a customer set in Dynamics GP. The price can be changed in the Unit Price textbox.
Ext Price	The sub-total amount for each item. This figure (and the Total amount) changes as the price, markdown or quantity is changed.
Site ID	Choose a site ID based on the distribution warehouse site that the inventory item is released from.
Price Level	Select an item price level established in GP. By default, the price level is pulled from the Customer Master's Price Level field for the selected customer.
Mark Down	Permits the user to add a price reduction per each item. The markdown can be entered as a set amount or as a percentage. This setting is located under the Settings > Recurring Billing Settings in the Admin section.
PAYMENT DETAILS SECTION	INPUT
	<ol style="list-style-type: none"> From the Payment Details drop-list, choose either On Account or E-Payment On Account option allows the customer to be billed at a later time and the invoice will be integrated into Dynamics as an unpaid, outstanding invoice. E-Payment sets up payment with the customer's eCheck or credit card account. When E-Payment is chosen, a look-up icon appears next to the drop-list that allows a payment method to be chosen from the customer wallet. Enter Trade discounts if any Enter Miscellaneous charges if any Enter Freight charges, if any Click the Save button at the bottom of the page to create the invoice contract

An editable **View Invoice Contract** page displays.


NOTE: If the End Date is not entered, the contract will display 12/31/9999 to indicate that the contract is open-ended


New Invoice Contract


ADAMPARK0001 
Adam Park Resort


Memo:


Line items have different start dates and frequencies

First Invoice Date: 

Frequency: 


Default Site ID: 


End Date: 



Contract Class ID: 


Document Options | **Line Items**

Customer #: **ADAMPARK0001**
Adam Park Resort


Document Type:  Type ID: **EPIV**

Shipping Method: 

Payment Terms:  Tax Schedule: 


Billing Address: 

Roberta Masouras
 P.O. Box 1391
 Indianapolis, IN 46206-1391
 USA

Shipping Address: 

Roberta Masouras
 Suite 9876
 321 Chestnut Drive
 Indianapolis, IN 46206-1391
 USA

Payment Details:


 Credit Card -
 MC
 XXXXXXXXXXXX4444
 12/2019

Subtotal: \$229.95

Trade Discount:

Miscellaneous:

Freight:

Tax: \$16.10

Total: \$246.05

[SAVE & NEW](#) [SAVE & REVIEW](#)

Figure 3-51 New Recurring Contract - Document Options Tab


New Invoice Contract


ADAMPARK0001 


Adam Park Resort


Memo:


Line items have different start dates and frequencies

First Invoice Date: 












Frequency: 

Default Site ID: 

End Date: 



Contract Class ID: 

Document Options Line Items

ITEM CODE	QUANTITY	DESCRIPTION	UOFM	UNIT PRICE	EXTENDED PRICE
<input type="text" value="256 SDRAM"/>   	<input type="text" value="1"/>	<input type="text" value="256 meg SDRAM"/>	<input type="text" value="Each"/> 	229.95	\$229.95
Site ID: <input type="text" value="WAREHOUSE"/> 		Price Level: <input type="text" value="RETAIL"/> 			
Mark Down: <input type="text" value="0.00"/>					
<input type="text"/>  	<input type="text"/>	<input type="text"/>	<input type="text"/> 	<input type="text"/>	<input type="text"/>
Site ID: <input type="text"/> 		Price Level: <input type="text"/> 			
Mark Down: <input type="text"/>					

First Prev 1/1 Next Last

Payment Details:

 
 Credit Card -
 MC
 XXXXXXXXXXXXX4444
 12/2019

Subtotal: \$229.95

Trade Discount:

Miscellaneous:

Freight:

Tax: \$16.10

Total: \$246.05

SAVE & NEW
SAVE & REVIEW

Figure 3-52 New Recurring Contract - Line Items Tab

Assign Different Start/End Bill Dates to Multiple Items

This feature gives the user different invoice/billing options for individual items in the same order. This order flexibility allows customers to:

- Create different start and end times for billing for each item in the order
- Establish a billing frequency, such as daily, weekly or monthly for each item in the order

NOTES:

- When all items have the same invoice billing dates, make sure the checkbox called **Line items have different start dates and frequencies** is **NOT** marked.
- The ability to assign different start and end dates cannot be enabled after an order has already been started. If different billing dates are needed, delete the existing items and start over.

To enable this feature:

1. Mark the **Line items have different start dates and frequencies** checkbox
2. Click the **Line Items** tab
3. Use the lookup icon to choose an item from inventory and make any adjustments needed in the associated fields in the line item row, such as **Markdown**
4. Enter a **Start Date** directly in the **Start Date** textbox or use the calendar
5. Enter an **End Date** directly in the **End Date** textbox or use the calendar.
6. Choose a billing frequency from the **Frequency** drop-list

NOTE: In addition to scheduled billing frequencies, the user can also choose a one-time billing.

7. Repeat for as many items as needed. Each item can have different start and end dates
8. Complete the rest of the form as described in the **Create a Recurring Billing Contract** section and click the **Save** button

Payments processed successfully will be in the Documents Queue (**Admin > Document Queue > Sent** tab). To see payments that were unsuccessfully transferred to GP, click the **Failed** tab.

Contracts are processed according to the time established in the next bill date. Invoices show up in the ePay document queue when the scheduler has completed payment processing for the scheduled time period it is currently working on. Payments can also be viewed in the Payment Gateway website.


New Invoice Contract

ADAMPARK0001 

Adam Park Resort


Memo:

Line items have different start dates and frequencies

First Invoice Date: 













Frequency:

Default Site ID:

End Date: 


Contract Class ID:

Document Options | **Line Items**

ITEM CODE	QUANTITY	DESCRIPTION	UOFM	UNIT PRICE	EXTENDED PRICE
<input type="text" value="256 SDRAM"/>   	<input type="text" value="1"/>	<input type="text" value="256 meg SDRAM"/>	<input type="text" value="Each"/>	229.95	\$229.95
Site ID: <input type="text" value="WAREHOUSE"/>		Price Level: <input type="text" value="RETAIL"/>		Mark Down: <input type="text" value="0.00"/>	
Start Date: <input type="text" value="5/2/2013"/> 		End Date: <input type="text" value="5/3/2013"/> 		Frequency: <input type="text" value="Monthly"/>	
<input type="text" value="128 SDRAM"/>   	<input type="text" value="1"/>	<input type="text" value="128 meg SDRAM"/>	<input type="text" value="Each"/>	135.20	\$135.20
Site ID: <input type="text" value="WAREHOUSE"/>		Price Level: <input type="text" value="RETAIL"/>		Mark Down: <input type="text" value="0.00"/>	
Start Date: <input type="text" value="5/6/2013"/> 		End Date: <input type="text" value="5/6/2013"/> 		Frequency: <input type="text" value="Monthly"/>	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Site ID: <input type="text"/>		Price Level: <input type="text"/>		Mark Down: <input type="text"/>	
Start Date: <input type="text" value="5/2/2013"/> 		End Date: <input type="text" value="5/3/2013"/> 		Frequency: <input type="text" value="Monthly"/>	

First Prev 1/1 Next Last

Payment Details:



Credit Card - MC

XXXXXXXXXXXX4444

12/2019

Subtotal: \$365.15

Trade Discount:

Miscellaneous:

Freight:

Tax: \$25.56

Total: \$390.71

Figure 3-53 Setting Different Start/End Dates for Order Items

3.4.2. Edit the Recurring Invoice Billing Contract

(Recurring Invoicing > View Invoice Contracts)

NOTES:

- Only the CSR can edit a Recurring Invoice Billing Contract.
 - NOTE:** Customers cannot make changes to an existing invoice contract. However, customers can change payment details for an existing contract if that contract is not in Closed status.
- The Recurring Billing tab gives a list of invoices associated with the Recurring Invoice Billing Contract.
- Recurring Invoice Billing Contracts cannot be edited after their status is changed to Closed. Once closed, they cannot be re-opened.

<i>View Invoice Contract tabs</i>	DESCRIPTION
Document Options	Allows a view of the fields in the document options section of the original document.
Line Item tab	Allows products to be added or deleted customer that signed up for the recurring billing.
Invoices tab	Makes available a clickable invoice link that opens a window that displays details for each line item.

To edit a recurring invoice billing contract:

1. Navigate to the **View Invoice Contracts** page

View Recurring Billing Invoice Contracts

Adam Park Resort

CONTRACT	CREATED ON	NEXT BILL DATE	STATUS
RB00000000000051	5/2/2013	5/2/2013	Active
RB00000000000036	3/5/2013		Closed
RB00000000000032	7/19/2012		Closed

2. A list of recurring billing contracts appears
3. In the **Contract** header column, click a contract number
4. When the invoice contract opens, click the **Edit** button at the bottom of the page

Edit Invoice Contract

Contract ID: RB0000000000051 Contract Status:

Memo:

Line items have different start dates and frequencies

First Invoice Date: 5/2/2013 End Date:

Frequency: Monthly Contract Class ID:

Default Site ID:

Document Options **Line Items** **Recurring Invoices**

Customer #: ADAMPARK0001
Adam Park Resort

Document Type: Type ID: **EPIV**

Shipping Method:

Payment Terms: Tax Schedule:

Billing Address:

Roberta Masouras
P.O. Box 1391
Indianapolis, IN 46206-1391
USA

Shipping Address:

Roberta Masouras
Suite 9876
321 Chestnut Drive
Indianapolis, IN 46206-1391
USA

Payment Details:

Credit Card -
MC
XXXXXXXXXXXX4444
12/2019

Subtotal:	\$365.15
Trade Discount:	<input type="text" value="0.00"/>
Miscellaneous:	<input type="text" value="0.00"/>
Freight:	<input type="text" value="0.00"/>
Tax:	\$25.56
Total:	\$390.71

5. A contract detail page loads
6. Click the **Edit** button at the bottom of the page
7. Make any changes, if required. Click the **Line Items** tab to change line item information
8. When done, click the **Save** button at the **bottom** of the page

NOTES:


- All existing recurring billing contracts can be viewed from this page by clicking the **View Existing Invoice Contracts** button.
- Clicking the **Invoices** or **Recurring Invoices** tab allows the following to be changed:
 - Payment Details
 - Trade Discount
 - Miscellaneous

➤ Freight

3.4.3. View the Recurring Billing Contract

(Recurring Invoicing > View Invoice Contracts)

Both customers and CSRs can view Recurring Billing Invoice Contracts by navigating to the **View Invoice Contracts** page. All columns can be filtered for new data views.

View Recurring Billing Invoice Contracts			
			ADAMPARK0001 
Adam Park Resort			
CONTRACT	CREATED ON	NEXT BILL DATE	STATUS
RB00000000000051	5/2/2013	5/6/2013	Active
RB00000000000036	3/5/2013		Closed
RB00000000000032	7/19/2012		Closed

3.4.4. Place an Existing Recurring Billing Contract on Hold

(Recurring Invoicing > View Invoice Contracts)

NOTE: Only a CSR can place an existing Recurring Billing Invoice Contract on hold

1. From the main menu, navigate to the **View Invoice Contracts** page
2. Click on the **Contract** number of the invoice contract to be placed on hold
3. A detailed view page opens
4. Click on the **Edit** button at the bottom right of the page
5. From the **Contract Status** drop list, choose **On Hold**
6. At the bottom right of the page, click the **Save** button
7. A new view detail page appears. The **Contract Status** field should now indicate that the invoice contract is **On Hold**

Edit Invoice Contract

Contract ID: RB0000000000051 Contract Status: **On-Hold**

Memo:

Line items have different start dates and frequencies

First Invoice Date: 5/2/2013 End Date:

Frequency: Monthly Contract Class ID:

Default Site ID:

Document Options | Line Items | Recurring Invoices

Customer #: ADAMPARK0001
Adam Park Resort

Document Type: Type ID: **EPIV**

Shipping Method:

Payment Terms: Tax Schedule:

Billing Address:

Roberta Masouras
P.O. Box 1391
Indianapolis, IN 46206-1391
USA

Shipping Address:

Roberta Masouras
Suite 9876
321 Chestnut Drive
Indianapolis, IN 46206-1391
USA

Payment Details:

Credit Card -
MC
XXXXXXXXXXXX4444
12/2019

Subtotal:	\$365.15
Trade Discount:	<input type="text" value="0.00"/>
Miscellaneous:	<input type="text" value="0.00"/>
Freight:	<input type="text" value="0.00"/>
Tax:	\$25.56
Total:	\$390.71

3.4.5. Cancel an Existing Recurring Billing Invoice Contract

(Recurring Invoicing > View Invoice Contracts)

NOTE: Only a CSR can cancel an existing Recurring Billing Invoice Contract

8. From the main menu, navigate to **Recurring Billing > Recurring Invoicing > View Invoice Contracts**
9. Click on the **Contract** number of the invoice contract to be cancelled
10. A detailed view page opens
11. Click on the **Edit** button at the bottom right of the page
12. From the **Contract Status** drop list, choose **Closed**
13. At the bottom right of the page, click the **Save** button

14. A new view detail page appears. The **Contract Status** field should now indicate that the invoice contract is **Closed**

Edit Invoice Contract

Contract ID: RB0000000000051 Contract Status: Closed

Memo:

Line items have different start dates and frequencies

First Invoice Date: 5/2/2013

Frequency: Monthly

Default Site ID: WAREHOUSE

End Date:

Contract Class ID:

Document Options | **Line Items** | **Recurring Invoices**

Customer #: ADAMPARK0001
Adam Park Resort

Document Type: Invoice Type ID: **EPIV**

Shipping Method: GROUND

Payment Terms: Net 30 Tax Schedule: CA-SALES

Billing Address:

Roberta Masouras
 P.O. Box 1391
 Indianapolis, IN 46206-1391
 USA

Shipping Address:

Roberta Masouras
 Suite 9876
 321 Chestnut Drive
 Indianapolis, IN 46206-1391
 USA

Payment Details:

E-Payment

Credit Card -
MC
XXXXXXXXXXXX4444
12/2019

Subtotal: \$365.15

Trade Discount:

Miscellaneous:

Freight:

Tax: \$25.56

Total: \$390.71

CANCEL
SAVE

3.4.6. Skipping an Invoice Contract Billing Cycle

(Recurring Invoicing > View Invoice Contracts)

ePay's Recurring Billing module provides users the ability to skip a billing cycle without having to cancel the contract and create a new one. For example, if a contract is set up for monthly billing on the 30th of every month and on March 15, the skip functionality was used; the next billing date would be April 30. To skip a billing cycle:

1. Navigate to the **View Invoice Contracts** page

2. Select a contract from the **Contract** column
3. In the Line Items tab, click the **Skip** link (adjacent to the **Next Invoice Date**)
4. A pop-up window opens asking to verify if the billing cycle should be skipped. Click OK to verify.



5. The contract page will refresh. When it finishing refreshing, verify that the Next Billing Date in the Line Items tab has been updated

NOTE: The following screenshots show 2 scenarios with skipping billing cycle. The first one was for contracts with line items having different billing date. The second was for contract where line items have the same billing date.

ITEM CODE	QUANTITY	DESCRIPTION	UOFM	UNIT PRICE	EXTENDED PRICE
256 SDRAM	1	256 meg SDRAM	Each	\$229.95	\$229.95
Site ID WAREHOUSE		Price Level RETAIL			
Mark Down \$0.00					
Start Date 5/2/2013		End Date 5/3/2013	Frequency MONTHLY	Next Invoice Date	
128 SDRAM	1	128 meg SDRAM	Each	\$135.20	\$135.20
Site ID WAREHOUSE		Price Level RETAIL			
Mark Down \$0.00					
Start Date 5/6/2013		End Date 5/6/2013	Frequency MONTHLY	Next Invoice Date 5/6/2013 Skip	

View Invoice Contract

Contract ID: RB0000000000047 Contract Status: Active
 Memo: Recurring Billing

Line items have different start dates and frequencies

Next Invoice Date: 5/10/2013 [Skip](#) End Date: 12/31/9999
 Frequency: Monthly Contract Class ID:
 Default Site ID: WAREHOUSE

ITEM CODE	QUANTITY	DESCRIPTION	UOFM	UNIT PRICE	EXTENDED PRICE
-----------	----------	-------------	------	------------	----------------

3.5. AutoPay

This features in this section are only available with the [AutoPay](#) module of ePay

The AutoPay module allows both customer and CSR users to be able to configure AutoPay contracts that will allow for a payment to occur on a repeated basis.

3.5.1. New AutoPay Contract

(Recurring Payment > New AutoPay Contract)

The 'New AutoPay Contract' page can be used by both the Customer and CSR User to create a new AutoPay Contract.

New AutoPay Contract

Memo:

Fixed Amount
Currency: \$

Based on All Outstanding Invoices

All Accounts

Main Account

Multiple Selected Accounts

No end date

Ends after: occurrences

Ends by:

Frequency: Monthly

Wallet ID:
 Credit Card
 XXXXXXXXXXXXX1111
 12/2016

Review Terms and Conditions

I accept the terms and conditions of the above agreement

A service fee of \$15.00 will be applied to each payment

SAVE

The following features are available on this page:

1. **Memo** – This field can be used to add an associated note to the invoice
2. **Payment Options** – The available Payment Options can be configured from the [AutoPay](#) tab of the 'Recurring Billing Settings' administrative page. The available options are as follows:

- a. **Fixed Amount** – The AutoPay contract will generate payments passed the amount in the Fixed Amount field for each contract cycle
 - b. **Based on Invoice Due Date** – If this option is selected for the AutoPay Contract, during each contract cycle, a payment will be generated for the total of the balance of the outstanding invoices that have a due date that is less than or equal to the current date.
 - c. **Based on Invoice Document Date** – If this option is selected for the AutoPay Contract, during each contract cycle, a payment will be generated for the total of the balance of the outstanding invoices that have a document created date that is less than or equal to the current date.
 - d. **Based on All Outstanding Invoices** – If this option is selected for the AutoPay Contract, during each contract cycle, a payment will be generated for the total of the balance of all the outstanding invoices.
3. **Currency** – The AutoPay contract will only pay invoices that are only in the selected currency. This option will only be available if multiple currencies are configured for payment from the [Multicurrency Settings](#) administrative page.
 4. **Accounts Option** – This option will only be presented for a parent customer account to determine which accounts the AutoPay contract will apply to
 - a. **All Accounts** – The AutoPay contract will pay invoices children accounts and the parent account
 - b. **Main Account** – The AutoPay contract will only pay the parent account invoices
 - c. **Multiple Selected Accounts** – The Magnifying Glass icon can be clicked to allow the user to select specific accounts for the AutoPay contract to pay invoices for.
 5. **First Payment Date** – The first date for the AutoPay contract to run, this date will be used to determine the date for future payments based on the frequency.
 6. **End Date Options** – The End Date options are available if there is a desired time for the AutoPay contract to end automatically.
 - a. **No End Date** – The contract will not end automatically
 - b. **Ends After _ Occurrences** – The user can specify the number of cycles for the contract to run before the contract ends
 - c. **Ends By** – The user can specify a specific date for the contract to end
 7. **Frequency** – The frequency for each AutoPay cycle
 8. **Wallet ID** – The Wallet Entry that will be used when capturing payments for the AutoPay contract
 9. **Terms and Conditions Agreement** – If the 'Show Agreement' setting is enabled from the [AutoPay Contract](#) tab of the 'Terms and Conditions' administrative settings page, the Terms and Conditions agreement will be displayed in this section. The Customer user must mark a checkbox to confirm they read the agreement if the 'Require Customer Confirmation for New Contract' option is enabled from the settings.
 10. **Additional Fee Message** – The Additional Fee Message will appear if the currently assigned wallet is enabled for an Additional Fee from the AutoPay portion of the [Additional Fee](#) tab of the 'Feature Settings' administrative page.
 11. **Save Button** – Clicking this button will save the AutoPay contract

3.5.2. View AutoPay Contracts

(Recurring Payments > View AutoPay Contracts)

The 'View AutoPay Contracts' page can be used to view the available contracts associated to the account.

View AutoPay Contracts

Aaron Fitz Electrical

CONTRACT	NEXT PAYMENT DATE	FREQUENCY	AMOUNT	STATUS	PAYMENTS
RBP0000000000050		Pay every month on the 24th	\$5.00	Closed	1
RBP0000000000006	9/30/2012	Pay every month on the 30th	\$15.00	Active	4
RBP0000000000004	9/20/2012	Pay every month on the 20th	\$5.00	Active	4
RBP0000000000001		Pay every month on the 4th	\$15.00	Closed	1

The value in the 'Contract' column can be clicked to view the individual contract in more detail. The value in the 'Payments' column can be clicked to provide a list of the associated payments to the contract.

View AutoPay Contract

Customer # AARONFIT0001

Customer Name Aaron Fitz Electrical

Status: Active

Contract Number: RBP0000000000002

Memo: Test

Payment Option: Fixed Amount \$1.00

First Payment Date: 8/6/2015

Frequency: Pay every month on the 6th

Next Payment Date: 9/6/2015

Payment Type: Credit Card

Card Number: XXXXXXXXXXXX1111

Card Expiration: 12/2016

« BACK
EDIT

AUTOPAY PAYMENTS

PAYMENT NUMBER	PROCESS DATE	AMOUNT	STATUS
WEBPMT8000000017	8/6/2015	\$16.00	Processed

3.5.3. Edit AutoPay Contract

(Recurring Payment > View AutoPay Contracts)

By clicking the 'Edit' button while viewing the details on an AutoPay contract, the Edit AutoPay Contract page will be loaded. All of the options presented when creating a new AutoPay contract are available to be edited other than the 'Currency' option

The '**Status**' dropdown will also be available on this page to change the state of the contract. The available states are as follows:

- **Active** – The contract will continue to run its cycle as normal
- **On-Hold** – The contract is paused momentarily with the intention of being active again in the future
- **Closed** – The contract has ended and will not be set to active again. Setting the contract status to 'Closed' cannot be reversed after saving.

3.6. eSOP™ Advantage (Web Sales Order Entry) Overview

This option is only available with the [eSOP™ Advantage](#) module of ePay

(CSR > eSOP Advantage)

eSOP™ Advantage provides a quick method of creating orders that are placed on account or are paid immediately. This solution integrates with Microsoft Dynamics GP to automate sales order processing.

Because **eSOP™** Advantage is a web-based sales order entry form, any company's Sales representative can enter a sales order. The process involves logging into the portal, and creating a transaction for an existing customer. The generated transaction will automatically sync back to Dynamics GP. This can be done without taking up a Microsoft Dynamics user license.

3.6.1. Using eSOP™ Advantage

Only a Customer Service Representative (CSR) is able to create a Sales Order Entry for customer(s). The generated document will be integrated over into the Dynamics GP SOP (Sales Order Processing) module.

NOTE: **eSOP™** Advantage supports both 'Invoice' and 'Order' type documents.

To use **eSOP™** Advantage:

























1. Log onto the **eSOP™** application as a CSR and navigate to the **eSOP Advantage** page
2. Click on the lookup icon next to the 'Customer Number' box to open an existing customer or type the customer ID directly into the 'Customer Number' textbox. If the customer exists in GP, **eSOP™** Advantage will populate the customer's name and customer ID in the Sales Order Entry form.
3. Fill in the appropriate fields as detailed in the accompanying table. All non-editable fields are automatically generated.
4. When fields have been completed, click the **Submit** button to generate the sales order
5. After submitting the order, the application will automatically display a receipt
6. Press the Ctrl and P keys at the same time to print a receipt

3.6.2. Viewing the eSOP™ Advantage Sales Order

A historical record of sales orders can be viewed in Dynamics GP.

eSOP™ Advantage Fields Table

<i>Field</i>	Description
Type/Type ID	Choose the type of transaction from the drop-list: Invoice or Order. This field will be disabled once an item is added to the document.
Date	Date document is created
Document number	Identification number assigned to the document by the system
Batch ID	This setting is automatically generated, but is editable. When submitted, the populated Batch ID is sent to Dynamics GP along with the transaction.
Customer ID	Customer identification number
Default Site ID	This is the location for inventory. Choose the location where product items are located. Additional locations can be added through Dynamics GP.
Customer name	Name for the customer entered in the system
Customer PO Number	An optional field for reference purposes
Ship To	Choose a pre-set shipping location from the drop-list, including Warehouse, Primary or Office. Additional locations can be added through Dynamics GP.
Currency ID	Currency identification established in Dynamics GP
Shipping Method	Choose a shipping method from the drop list
Tax Schedule	<p>From the drop list, choose a Tax Schedule ID. This list is populated from Dynamics GP.</p> <p>NOTE: If customer is viewed as Tax Exempt if:</p> <ol style="list-style-type: none"> 1. Tax Exempt 1 and Tax Exempt 2 fields in Dynamics GP > Customer Maintenance are populated with any type of values. 2. Customer is assigned a tax exempt Tax Schedule ID in Dynamics GP, meaning the Tax Schedule ID has a 0.00% tax rate.
Bill To	Select a bill to entity
Payment Details	Choose a payment term from the drop list. If E-Payment is chosen, a Wallet lookup icon appears.

Field	Description																																				
	Clicking on the Wallet icon allows the user to choose a type of E-Payment. The wallet can be updated as described in the Create a New Wallet Item section of this user's guide.																																				
Trade Discount	Enter a trade discount amount																																				
Freight	Enter a charge amount for freight costs																																				
Miscellaneous	Enter any miscellaneous charges in this textbox																																				
LINE ITEM SECTION	DESCRIPTION																																				
Item Code	<p>Click on the Lookup icon to open a list of product items. Click on a product item to add it to the Sales Order form.</p> <div data-bbox="407 814 1053 1297" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p style="text-align: center;">Lookup Inventory Item</p> <p>Item Keyword: <input type="text"/> <input type="button" value="Refresh"/></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Item Code</th> <th>Description</th> <th>Total Qty</th> <th>Price</th> </tr> </thead> <tbody> <tr> <td> 1-A3261A</td> <td>Multi-Core Processor</td> <td>-1</td> <td>\$32,000.00</td> </tr> <tr> <td> BK MOUSE</td> <td>Black Mouse</td> <td>5</td> <td>\$19.95</td> </tr> <tr> <td> 3-A2969A</td> <td>1 TB SCSI Raid</td> <td>-1</td> <td>\$1,780.00</td> </tr> <tr> <td> KIT100</td> <td>test kit</td> <td>0</td> <td>\$0.00</td> </tr> <tr> <td> 128 SDRAM</td> <td>128 meg SDRAM</td> <td>11</td> <td>\$135.20</td> </tr> <tr> <td> 1-A3483A</td> <td>SIMM EDO 72</td> <td>3</td> <td>\$13,000.00</td> </tr> <tr> <td> 100XLG</td> <td>Green Phone</td> <td>24</td> <td>\$59.95</td> </tr> <tr> <td> A100</td> <td>Audio System</td> <td>2</td> <td>\$39.95</td> </tr> </tbody> </table> </div> <p>NOTE: If the item is not in stock, eSOP will open a notification window, indicating that the item is back-ordered. The item can still be placed on order, even if back-ordered.</p> <p>The product item code can also be added manually in the Item Code textbox.</p> <p>Another option is to type in the item number into the Item Code field.</p>	Item Code	Description	Total Qty	Price	 1-A3261A	Multi-Core Processor	-1	\$32,000.00	 BK MOUSE	Black Mouse	5	\$19.95	 3-A2969A	1 TB SCSI Raid	-1	\$1,780.00	 KIT100	test kit	0	\$0.00	 128 SDRAM	128 meg SDRAM	11	\$135.20	 1-A3483A	SIMM EDO 72	3	\$13,000.00	 100XLG	Green Phone	24	\$59.95	 A100	Audio System	2	\$39.95
Item Code	Description	Total Qty	Price																																		
 1-A3261A	Multi-Core Processor	-1	\$32,000.00																																		
 BK MOUSE	Black Mouse	5	\$19.95																																		
 3-A2969A	1 TB SCSI Raid	-1	\$1,780.00																																		
 KIT100	test kit	0	\$0.00																																		
 128 SDRAM	128 meg SDRAM	11	\$135.20																																		
 1-A3483A	SIMM EDO 72	3	\$13,000.00																																		
 100XLG	Green Phone	24	\$59.95																																		
 A100	Audio System	2	\$39.95																																		
Quantity	Enter an item quantity. The Ext Price field will update																																				
Description	Default description of the item as entered in Dynamics GP. The description can be changed by clicking in the textbox.																																				

<i>Field</i>	Description
Unit of Measurement (U of M)	The drop-list provides quantity options (when available) such as order products by the case or individually. Price and quantity variables associated with options such as case quantities, are generated by Dynamics GP.
Unit Price	Item pricing pulls from GP based on the customer's assigned Price Level.
Ext Price	Item pricing pulls from GP based on the customer's assigned Price Level.
SHIPPING	DESCRIPTION
Site ID	The identification number for the location of the inventory item.
Qty Fulfilled	The amount currently in inventory to be shipped
Ship to	Drop-list gives a choice of Ship to locations. These locations are established in Dynamics GP. New locations can also be created in eSOP: <ol style="list-style-type: none"> 1. Click on the Ship To icon located in the top portion of the sales form 2. When the Look up Customer Addresses window opens, click on the Create New Address link 3. A new window opens. Fill out the Create New Customer Address form 4. Click Save and a new customer address is created
Mark Down	This field allows the user to apply an immediate discount on the product item.
Qty to Back Order	Amount of the order item not in stock
Shipping Method	Drop-list provides a choice of shipping methods, such as local delivery, ground delivery, etc.
Base Cost	Standard or base cost as set up in GP. The user can hide the due date in the Administration section under eSOP Settings .
Price Level	Choose from customer price levels established in Dynamics GP.
Requested Ship Date	Enter the requested shipping date or select from calendar.

eSOP Advantage

Aaron Fitz Electrical

Type/Type ID: <input type="text" value="Order"/> [EPORD]	Date: 05/02/2013
Document No.: SOPORD00000310	Batch ID: <input type="text" value="EPAY1220130502"/>
Customer ID: AARONFIT0001	Default Site ID: <input type="text" value="WAREHOUSE"/>
Customer Name: Aaron Fitz Electrical	Customer PO Number: <input type="text"/>
Ship To: <input type="text" value="WAREHOUSE"/> 11403 45 St. South	Currency ID: Z-US\$
Shipping Method: <input type="text" value="LOCAL DELIVERY"/>	

ITEM CODE	QUANTITY	DESCRIPTION	U OF M	UNIT PRICE	EXTENDED PRICE	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

First Prev **1/1** Next Last

Tax Schedule: <input type="text" value="USASTCITY-6*"/>	Subtotal: \$0.00
Bill To: <input type="text" value="PRIMARY"/>	Trade Discount: <input type="text"/>
Payment Details: <input type="text" value="Credit Card"/>	Freight: <input type="text"/>
Card Type: <input type="text" value="Visa"/>	Miscellaneous: <input type="text"/>
Credit Card Number: <input type="text"/>	Tax: \$0.00
Exp. Date (MM/YY): <input type="text" value="Month"/> / <input type="text" value="Year"/>	Total: \$0.00
Card Security Code: <input type="text"/>	Comments: <input type="text"/>

Figure 3-65 eSOP™ Advantage Sales Order Entry Form

3.6.3. eSOP End of Day Report

(CSR > eSOP End of Day)

The End of Day Report gives the user the ability to view and structure sales information in any time-related format desired, such as daily, monthly or annual. End of Day functionality allows the user to review the various transaction types, including:

- Cash
- Credit Card
- On Account activities

To view the End of Day report:

1. Choose a single day or a date range
2. Select a payment type or choose **All** to view all transactions for the time period selected

- If desired, choose a CSR and the page will automatically update with transaction information for the CSR selected

NOTE: Clicking on the document heading will return the user to the Receipt confirmation page.

End Of Day Report

Date From:

Date To:

Payment Type: CSR:

Total: \$21.40

DOCUMENT DATE	DOCUMENT #	CUSTOMER #	CUSTOMER NAME	AMOUNT	PAYMENT TYPE	CSR
5/2/2013 3:52:15 AM	SOPORD00000308	ADAMPARK0001	Adam Park Resort	\$21.40	CreditDeposit-Visa	

Figure 3-66 eSOP™ End of Day Report

3.6.4. eSOP Order History

(Your Account > Order History)

NOTE: This page is only viewable by the CSR and it is only available with eSOP module.


The order history page allows the user to view a filterable list of eSOP orders and/or invoices. When opened, the list is populated by orders associated with the selected customer. If the original eSOP order document has been converted to an invoice within Dynamics GP, the original Order document number will be listed under the Invoice Number.


This order list can be searched in several ways:


- By date
- By document number
- By PO number
- The order list can be sorted by clicking on a column header
- Clicking on a document number will open a details window

Order History

Click [SHOW ALL](#) or select dates to see the rest of the orders.

Document Number ADAMPARK0001 

Date From: 2/1/2013 

Date To: 5/1/2013 

Adam Park Resort

CREATE DATE	DOCUMENT NUMBER	PO NUMBER	TOTAL
3/5/2013	EPIV000000000240		\$4.00
4/5/2013	EPIV000000000280		\$4.00

Figure 3-67 Order History

4. Additional Functionality

4.1. Single Sign-On

The ePay Single Sign-On (SSO) feature allows the user authentication to be performed by a third party website so a user can be passed into ePay without having to provide any additional credentials. This document describes the necessary changes to communicate the authentication process.

To utilize this feature, a link needs to be generated within the 3rd party application. For more information on utilizing Single Sign-On for ePay, please refer to the ePay Single Sign-On Guide

<http://www.nodus.com/documentation/ePay-SSO-Developer-Guide-v3.pdf>

4.2. SSL Certificate Setup

It is highly recommended to configure the ePay web site to use Secure Sockets Layer (SSL) connections to ensure that both incoming requests and outbound responses are encrypted prior to transmission.

After purchasing and installing a SSL certificate in IIS, the following configuration can be added to automatically redirect visitors using HTTP to HTTPS:

1. Log on to IIS server that ePay web site is installed
2. Go to installed the ePay Sitefiles folder
3. Open CustomizationUrl.config in notepad or any text editor
4. Add the following text above "</rewrites>"

```
<add name="ssl"
```

```
    virtualUrl="http://(.*)"
    rewriteUrlParameter="ExcludeFromClientQueryString"
    destinationUrl="https://$1"
    redirectMode="Permanent"
    ignoreCase="true"
    redirect = "Domain"
  />
```

5. Save this file.

4.3. Paylink with Credit Card Advantage (CCA)

This feature is only available with the [Tokenization](#) module of ePay with the PayFlowPro gateway and Credit Card Advantage Tokenization utilizing the Sales Order Processing (SOP) module

At times, due to PCI Compliance complexity, merchants may not want to allow their internal users to enter credit card information directly into the back office ERP. Using Paylink feature, a merchant can have their customer enter credit card payment information through ePay directly onto a credit card entry form loaded from the PayPal PayFlowPro Gateway.

The link for the PayLink feature should be included on the [CCA Transaction Notification](#) email, please ensure this email is configured properly before beginning. Additional configuration for this feature is required and noted within the Credit Card Advantage Tokenization User Guide. Please contact Nodus Support if this document is needed.

The user within Dynamics GP will trigger the CCA Transaction Notification email to be sent to the customer from an order or invoice document from the Sales Order Processing module. After the customer clicks the link they will be directed to ePay to view their invoice information, verify and/or update the billing information and enter payment information to submit the payment without having to login to the ePay portal.

WELCOME TO NODUS TECHNOLOGIES, INC.

STEP 1: Verify Payment Information

INVOICE #	DATE	AMOUNT
STDINV2296	5/2/2013	\$39.95

STEP 2: Enter/Verify Billing Information

Account Holder Name:

Street:

Street 2:

City:

State:

Zip Code:

Country:

STEP 3: Enter Credit Card Information, then click "Submit"

Pay with credit or debit card

Card number

DISCOVER
VISA
MasterCard
AMERICAN EXPRESS
MASTERCARD
JCB

Expiration date mm / yy /

After the user clicks 'Submit', a Book or Authorization type transaction will be processed and returned back to Credit Card Advantage in Dynamics GP. The payment can then be captured from CCA in

Dynamics GP using 'Ship' transaction functionality as long as the document has been converted to an invoice.

For further details on CCA's supported functionalities, please review Nodus Credit Card Advantage Tokenization User Guide.

4.4. Mobile ePay

This feature is only available with the [Encryption](#) or [Tokenization](#) processing options enabled

This feature gives the customer the ability to pay for their outstanding invoices via their mobile devices. Currently, ePay supports 2 types of mobile phone: iPhone and Android Phone.

For tablet devices such as iPad, ePay will always default user to desktop version instead of mobile version. To switch from desktop version to mobile version, please see the section 'How to access ePay Mobile site' below.

Mobile ePay is installed as a different site folder with the name 'm' under the main ePay web site folder.

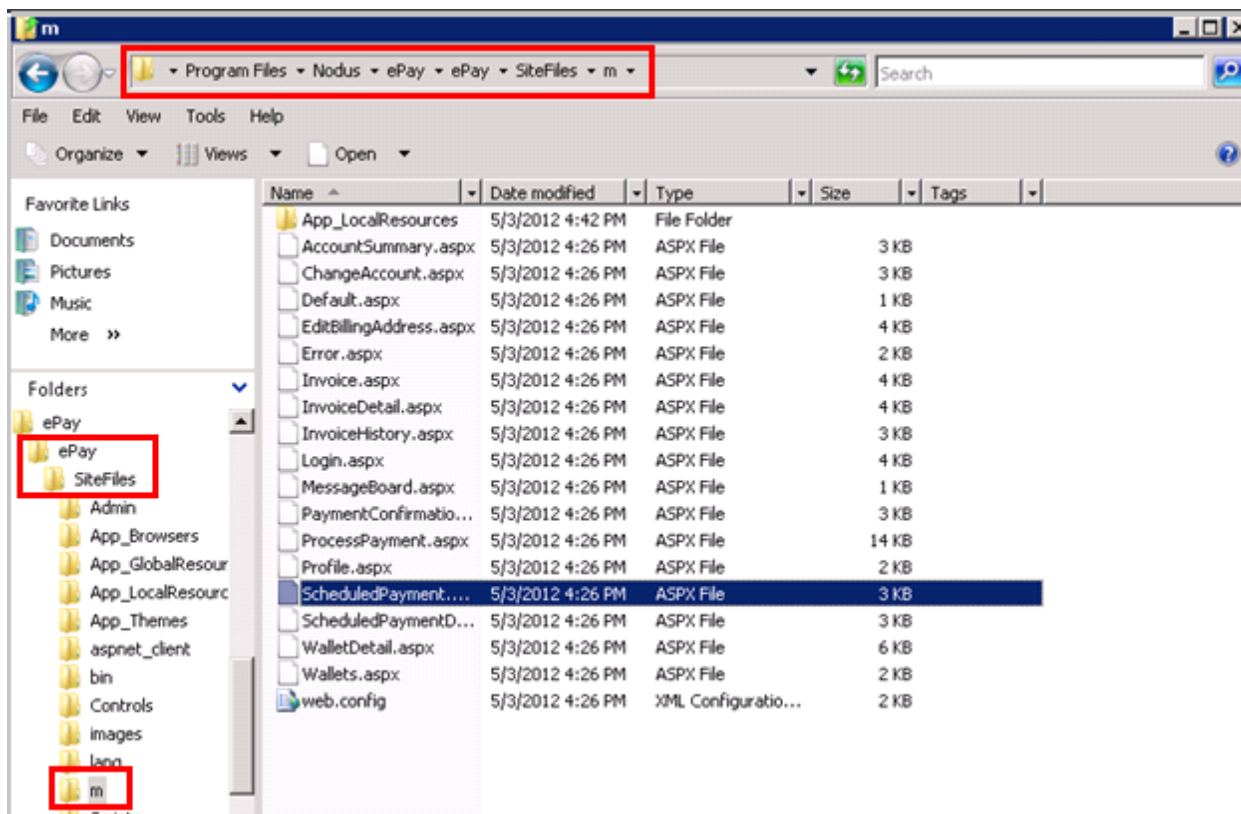


Figure 4-1 ePay Mobile Site folder

How to Access ePay Mobile Site

From a Desktop Computer/Tablet Device:

In order to access the ePay's mobile site, on the address bar, type in the regular ePay website address, then add 'm' into the URL right before the actual landing ASPX page.

Example:

Regular ePay site: <http://ePaySiteURL/login.aspx>

ePay's Mobile site: <http://ePaySiteURL/m/login.aspx>

From a Mobile device:

In order to access the ePay's mobile site, on the address bar, type in the regular ePay website address, ePay will automatically redirect the user to the mobile site if user is using the mobile device that is currently supported by ePay.

Example:

Regular ePay site: <http://ePaySiteURL/login.aspx>

ePay's Mobile site: <http://ePaySiteURL/m/login.aspx>

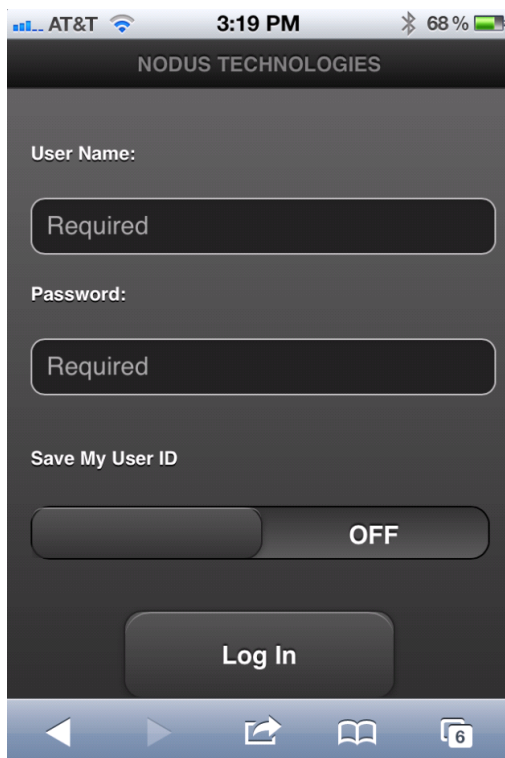


Figure 4-2 ePay Mobile Site - Login page (view from iPhone)

How to Use ePay Mobile Site

Mobile ePay is currently supported only customer user, **not** admin or CSR user. Customer can use their existing username from the desktop version to login to the mobile version of ePay.

NOTE: User can choose to save their username for future login by sliding the bar from left to right under 'Save My User ID' to turn on the option.

Account Summary Page

Once user has logged in to ePay, the landing page will be the Account Summary page where it displays the summary of the customer's account.

- Outstanding Invoices:** displays the number of existing outstanding invoices & the total outstanding balance for the account.
- Past Due Invoices:** displays the number of past due invoices and the total past due balance for the account
- Scheduled Payments:** displays the number of payments scheduled to be paid in the future and the total scheduled balance for the account.
- Express Pay:** clicking this button will allow user to proceed to pay a lump sum for all existing outstanding invoices.
- Invoice History:** clicking this button will allow user to search for paid invoice(s).
- Wallet:** user can maintain his/her existing wallet for credit card
NOTE: Mobile ePay currently does not support eCheck wallet entry.
- Profile:** user can view his/her default billing address under 'Profile'

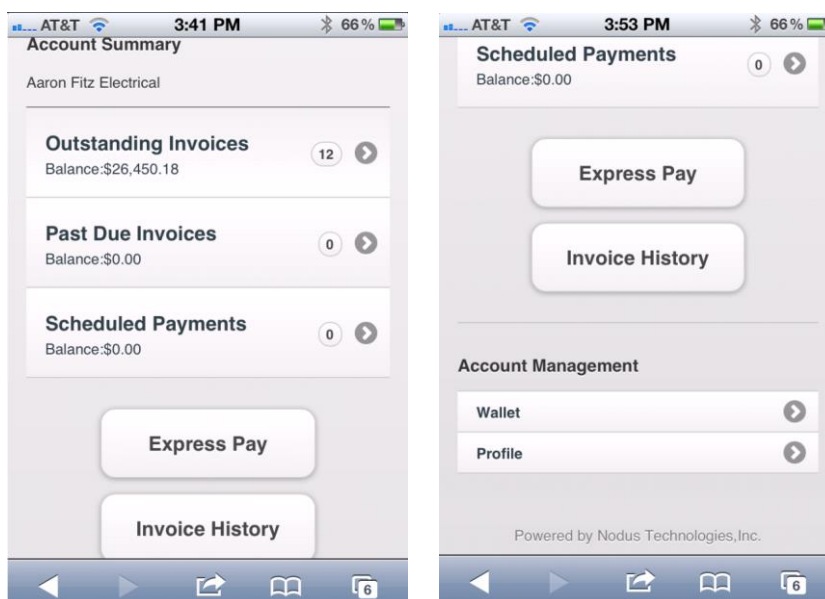


Figure 4-3 ePay Mobile Site – Account Summary page

Making Payment Against Outstanding Invoice(s)

Account Summary > Outstanding Invoices

Once user clicks on **Outstanding Invoices** option from Account Summary page, user will see the list of all existing outstanding invoices for the account. The list could expand to several pages as each page can only display up to 10 invoices.

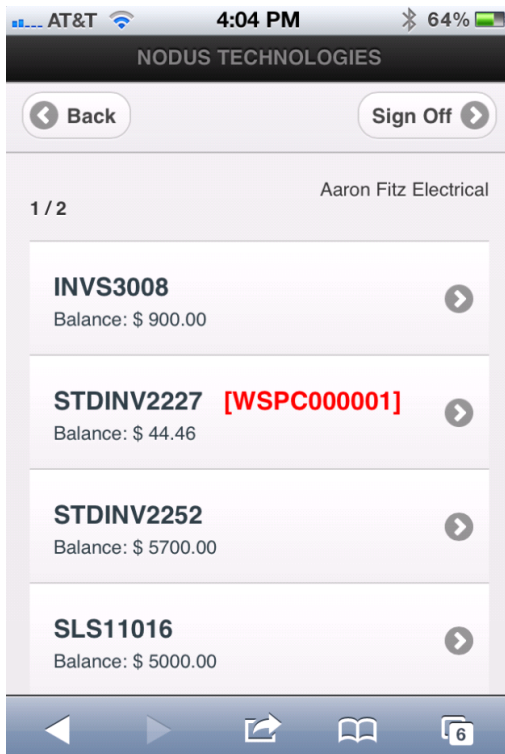


Figure 4-72 ePay Mobile Site – Outstanding Invoices page

To view the details of each outstanding invoice from the list, user can click on the ► icon to view the details of the invoice. The following details will be available for user:

1. **Date:** Invoice's document date
2. **Invoice #:** Invoice's document number
3. **Original Amount:** the original balance for the invoice document
4. **Due Date:** the due date for the invoice document
5. **Balance Due:** the amount due or remaining balance for the invoice
6. **Comment:** additional information (if available) for the invoice

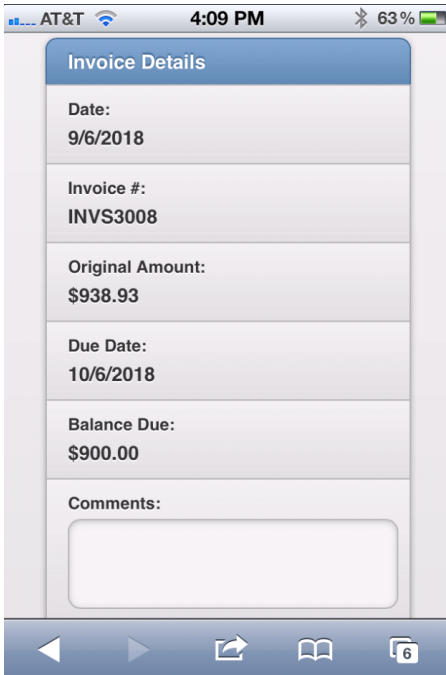


Figure 4-73 ePay Mobile Site – Invoice Details page

After viewing the details of each outstanding invoice from the list, user can click on the button 'Add to Pay List' to add the selected invoice to the 'to be pay' list. The amount to be paid for can be adjusted (if partial payment is allowed by the site admin).

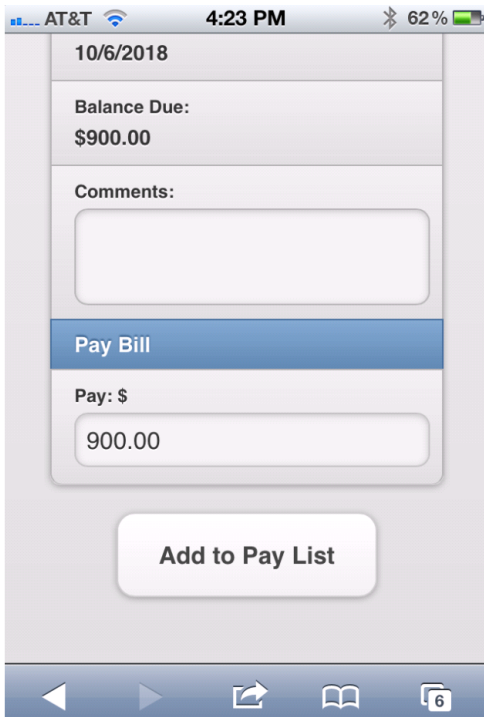


Figure 4-74 ePay Mobile Site – Add to Pay List

Once adding the invoice to the 'to be pay' list, user will be brought back to the Outstanding Invoices list. Here, user can add additional invoice(s) to the list using the same steps above or click 'Check Out' to proceed making the payment.

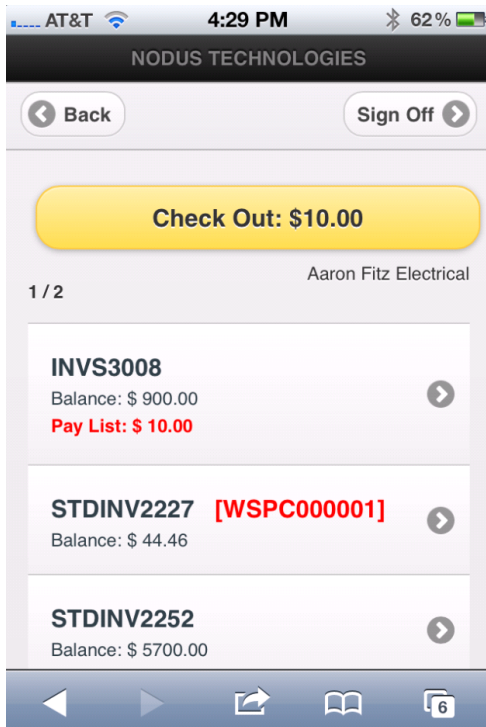


Figure 4-75 ePay Mobile Site – Check Out Payment

After clicking on 'Check Out', user will be brought to the Payment page. Here, user can review the 'to be pay' invoice selection list. User can click 'Continue' button when ready to proceed to enter the payment information.

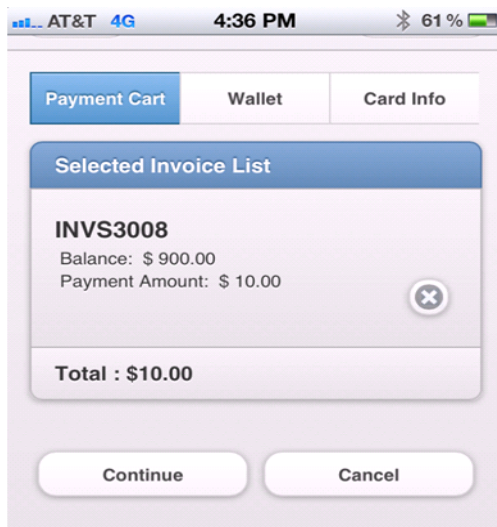


Figure 4-76 ePay Mobile Site – Payment Review

From the Payment Options page, user can select an existing wallet entry from the Wallet or enter new payment information by choosing the option 'Enter Credit Card' from **Select from Wallet** drop-down list. Then, click on 'Continue' button.

NOTE: If preferred, user can checkmark 'Pay Later' to schedule the payment to be processed on a future date by selecting 'Pay Date' from the calendar picker. Click on 'Continue' button to proceed to next step.

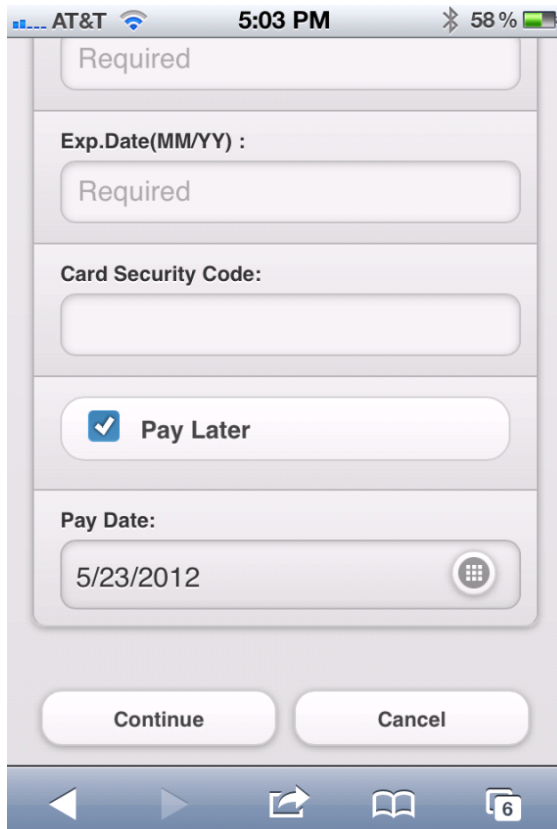
A screenshot of a mobile application interface for a payment schedule. The status bar at the top shows 'AT&T', signal strength, Wi-Fi, the time '5:03 PM', and 58% battery. The form contains several input fields: a 'Required' field, an 'Exp.Date(MM/YY) :' field with 'Required' text, and a 'Card Security Code:' field. Below these is a 'Pay Later' option with a checked checkbox. A 'Pay Date:' field shows '5/23/2012' with a calendar icon. At the bottom are 'Continue' and 'Cancel' buttons. The iOS home indicator bar is visible at the very bottom.

Figure 4-77 ePay Mobile Site – Payment Schedule

Once user clicks on 'Continue' from the Payment Options page, user can review or enter the card holder's information for the credit card entry in used. If all the information is correct, user can click on the 'Submit' button to either:

1. Submit the payment transaction to be processed immediately in real-time.
2. Submit the scheduled payment transaction to be processed in the future date.

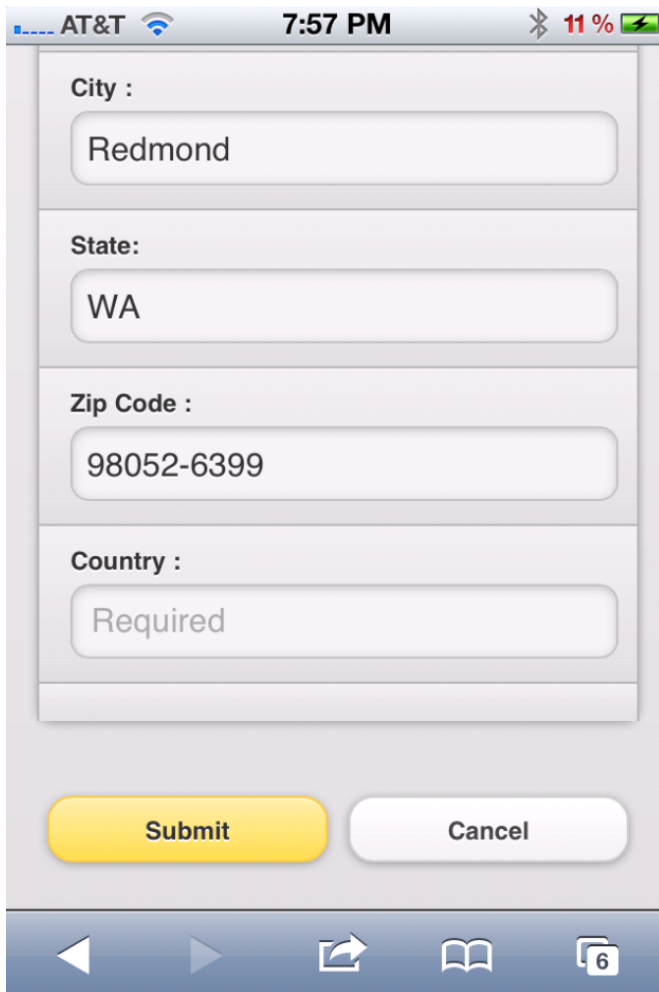
A screenshot of a mobile application interface for entering card information. The status bar at the top shows 'AT&T', signal strength, Wi-Fi, the time '7:57 PM', Bluetooth, and 11% battery. The form has four input fields: 'City : Redmond', 'State: WA', 'Zip Code : 98052-6399', and 'Country : Required'. Below the fields are two buttons: a yellow 'Submit' button and a white 'Cancel' button. At the bottom is an iOS-style navigation bar with icons for back, forward, share, bookmarks, and tabs (6).

Figure 4-78 ePay Mobile Site – Card Information

Invoice History

[Account Summary > Invoice History](#)

Invoice History page allows user to search for invoice(s) that have been paid in full. User can search for the paid invoice by invoice document # or by date range using invoice document date.

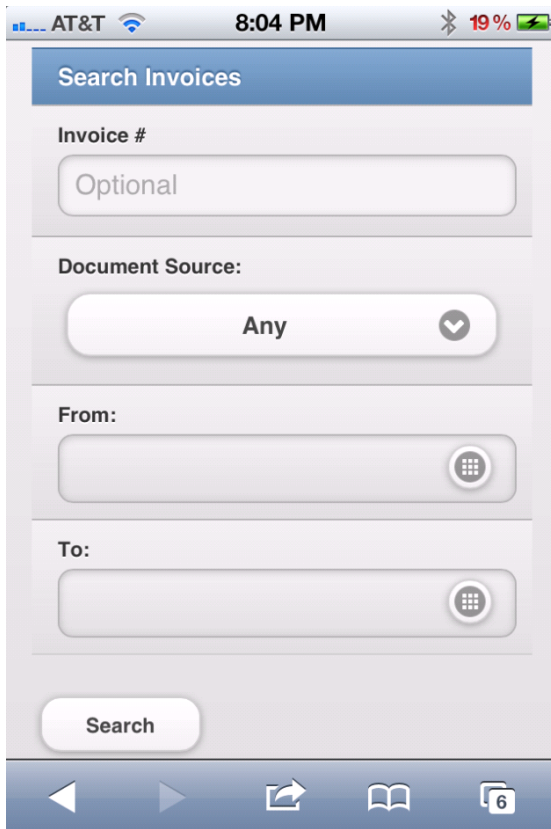


Figure 4-79 ePay Mobile Site – Invoice History

Wallet

Account Management > Wallet

Wallet page allows user to modify existing wallet entry or enter a new wallet entry.

1. To view the details of existing wallet entry from the list, user can click on the ▶ icon to view the details of the wallet. User can click on the 'Edit' button at the bottom of the page to edit the entry. **NOTE:** User can only edit the account information and expiration date, not the credit card number.
2. To create a new wallet entry, user can click on the 'Create New' button and enter all the card details and card holder's information. Click 'Submit' to save the new wallet entry.

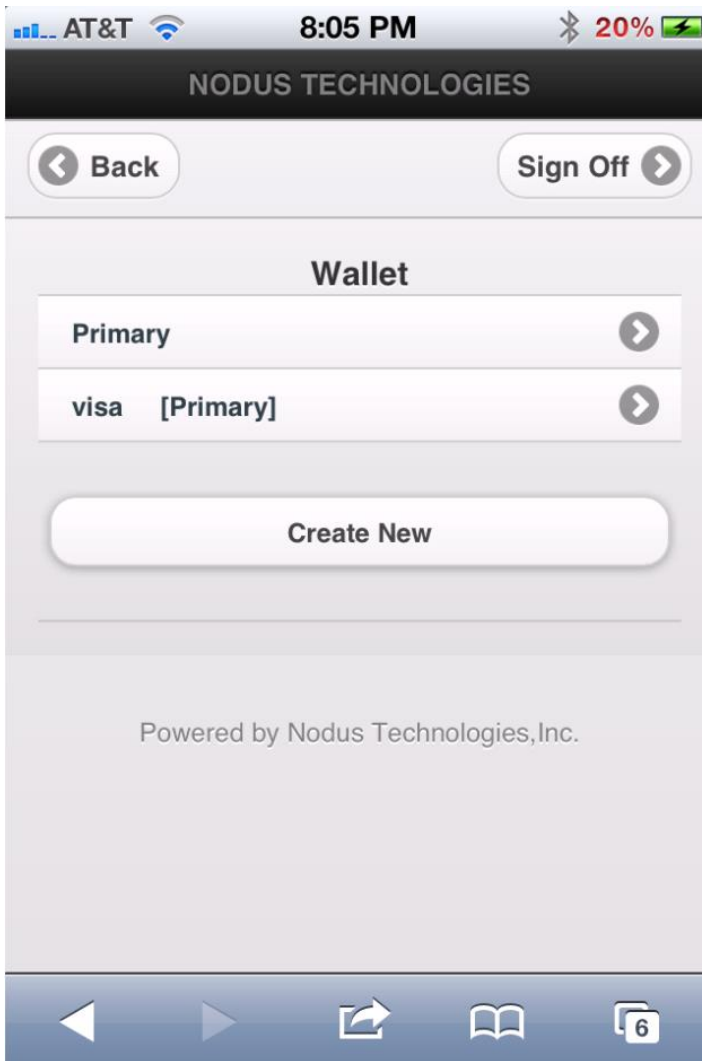


Figure 4-80 ePay Mobile Site – Wallet

Navigation

Back button: To go back to previous page, user can click on the 'Back' button.

Sign Off button: To log out of ePay, user can click 'Sign Off' button.

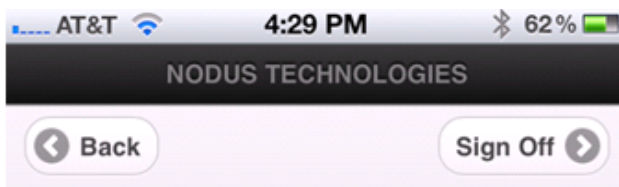


Figure 4-81 ePay Mobile Site – Navigation

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