NODUS Technologies, Inc.

ePay Release Notes

ePay Advantage Version 6 R3

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ePay
Advantage
Online Bill Pay

NODUS Technologies, Inc.

Contents

New Features Summary

Integration with Dynamics NAV

A new integration utility has been made to allow ePay Advantage to integrate with Dynamics NAV.

Level 2 and 3 Data Submission

To help merchants reduce their processing rates, ePay now has the option to send level 2 and 3 data to the payment gateway.

Improved Registration Experience

The customer registration experience has been improved to allow customers to register faster. New ways to register have also been added to the invoice notifications and past due reminder e-mails.

Extra Data on Invoices

Invoices now support unlimited user defined values for both the invoice and the invoice line items to support complex invoice displays.

New Design

Many ePay pages have been completely redesigned with a new look and feel that will improve the user experience regardless of the device they are using.

PA-DSS 3.2 recertification

EPay Advantage has been recertified for the Payment Application – Data Security Standard (PA-DSS) version 3.2. This recertification includes security enhancements and support for TLS 1.2. As PCI has declared older encryption protocols insecure and it is highly recommended migrate systems in contact with sensitive data to utilize TLS 1.2. The following document contains more information from PCI about the migration process.

https://www.pcisecuritystandards.org/documents/Migrating_from_SSL_Early_TLS_Information%20Supplement_v1.pdf

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ePay Advantage Version 6 Release 3

Support for Level 2 and 3 data submission for transaction processing

- New administrative settings have been added to submit additional transaction data while processing transactions. The following options are available
    - Level 2 – Simple: Only level 2 data will be sent during processing
    - Level 2/3 – Summary: Each invoice will be summarized into a single line during processing
    - Level 2/3 – Detailed: Full line item data from the invoice will be submitted during processing. If an invoice is not being paid in full, then the invoice will be summarized.

Improved registration process

- Customer Registration can now be initiated from the Past Due Invoice Reminder and the New Invoice Import e-mails. New sections have been added to these e-mail templates that will only display if the customer has not yet registered for ePay.
- Customers can directly access the page to request the activation e-mail from the login page rather than having to click through two pages as in the previous version.
- Various fields have been removed from Registration page such as the phone number.

Support for MasterCard 2-series BIN numbers

- Credit cards in the new MasterCard 2-series BIN range (cards starting with the first six digits in the range of 222100-272099) are now identified as MasterCards

Support for user defined values for line items on the invoice template

- Unlimited user defined values associated to line items can be included on the invoice template.
- The ExtensionData field has been included in the following ePay REST API calls
    - Invoice POST
    - Invoice GET
    - InvoiceLineItem POST
    - InvoiceLineItem GET

Support Google ReCapcha Version 2

- Version 2 of Google ReCaptcha is now supported to allow for a more secure and user friendly access method to ePay while protecting the site from automated access programs

Support user credentials for access to invoice PDF files

- Username and Password credentials can now be provided so ePay can access Invoice PDF files for invoice download that may be saved in a secured network location.

Ability to hide the Selected Transactions table while selecting invoices to pay

- The "Selected Transactions" table can now be hidden from the "Make Payment" page

Ability to filter records by Status on the Payment History

- A status option has been added to the search criteria on the Payment History to filter the records by Scheduled, Processed, Voided and Failed payments
- The functionality of the previous Scheduled Payments page has been merged into the Payment History with this change and is no longer available

New website URL variable

- The website URL is available as a variable for e-mail templates to help with setting up the e-mail templates faster. The value for this variable can be configured from the Site Settings

Notification when the user is logged out of ePay due to inactivity

- A notification has been added to inform the user when they are logged out of ePay due to inactivity.

Additional User Interface changes

- A new wallet entry form, payment receipt and other minor user interface changes have been made throughout the website

Support for Microsoft Dynamics GP 2018

- The newest version of Microsoft Dynamics GP is now supported with ePay.

ePay Advantage Version 6 Release 2

Change Details

New Responsive Design

Many of ePay's pages have been completely redesigned to provide better support to users with different sized screens such as on a mobile device or a tablet.

The following pages utilize this new design:

- Login Page
- Registration
- Request Activation Code
- Forgot Username
- Forgot Password
- Make Payment (Previously named Outstanding Invoices)
- Payment History
- Invoice History (Previously named Paid Transactions)
- Review & Pay
- Payment Confirmation
- Wallet
- New AutoPay Contract
- View AutoPay Contracts
- Edit AutoPay Contract

Allow a PDF attachment of invoices to certain e-mail templates

The New Invoice Import and Express Pay email templates now have an option to attach a pdf file of the invoice to the e-mail

Additional CSR Permissions

New permission options have been added to the CSR groups to allow CSR users from accessing certain pages or performing certain actions. The following permissions have been added:

- Add/Edit Wallet
- View Customer Account Information
- Access Customer Profile page
- Access Schedule Payments page
- Pay Outstanding Invoices
- Access Process Prepayment page
- Apply Credits
- View AutoPay contracts
- Add/Edit AutoPay Contracts
- View Recurring Invoice contracts

- Add/Edit Recurring Invoice contracts
- View Installment contracts
- Add/Edit Installment contracts

Redesigned Menu

The ePay menu has been redesigned for quicker access to important pages such as Invoice and Payment History

Separate Batches by Payment Type

The payment batches in ePay can now be separated by the payment method (Visa, MasterCard, eCheck, etc...)

Configurable cutoff time for payment batches

A cutoff time can now be configured for payment batches to allow for the payment batches to be closer aligned with the transaction settlement time. Payments processed after the cutoff time will be put into the batch with the following day's transactions.

Forgot Password Changes

The business phone number is no longer required for a user to request a forgotten password.

Process Enhancements for improved user experience

Processes have been enhanced to

- Applying credits is now done in a separate process without requiring an active connection to the back office ERP
- E-mails are sent in a separate process from the user's payment to allow for the user to pay faster
- Data is being managed in a more efficient manner to allow for better performance on the website.

API Changes

- UnsumbittedDocument GET API has been added to allow for retrieval of different document types in the future
- Payment GET API has been redesigned to simply return the payment details
- The previous version of the Payment GET API is still available as PaymentV1

No longer supported features

The following features are no longer supported in this release

- eSOP Advantage
- PayLink integration from CCA Tokenization
- Mobile ePay

Support for GP 2016 R2, Microsoft SQL Server 2016 and Windows Server 2016

ePay Advantage Version 6

Change Details

Security Enhancements

New security enhancements have been applied to ePay to address the PA-DSS 3.2 requirements. EPay Advantage has been recertified as a PA-DSS application

Support for only the TLS 1.2 encryption protocol

Based on the PA-DSS requirement, weaker encryption protocols of SSL, TLS 1.0 and TLS 1.1 are no longer supported by ePay. ePay must be installed on a server that supports TLS 1.2.

In relation to this, Windows Server 2008 is no longer a supported operating system for ePay. Windows Server 2008 R2 is still supported if TLS 1.2 is enabled.

Support for Dynamics GP 2016

ePay Advantage Version 5.0 Release 2

Change Details

Multicurrency Settings Page

Allow the administrator to configure acceptance for payments by credit card or eCheck in additional currencies. Additional configuration options for integration of the payment into the back office ERP are also available.

This page is only available with Encryption and PayFabric versions of ePay.

Currency Filter

Filter the records displayed on ePay's pages by the currency of the associated documents. Available for the Outstanding Invoices, Paid Transactions and Payment History pages.

Multicurrency for Prepayment

Prepayments can now be configured to use additional configured currencies

Multicurrency for AutoPay

AutoPay contracts can now be configured to use additional configured currencies

Multicurrency Invoice Application

Payments in additional currencies can now be automatically applied to invoices in the back office ERP. (Only available for GP2013 and above)

Customizable Invoice Details Template

The Invoice details page can now be customized from the ePay administrative portal using the new advanced editor. Multiple templates can be saved with this new feature.

Assign Invoice Templates to Different Invoice Types

Each invoice type can be assigned to a different invoice template from the ePay administrative portal.

Self Service for Customers who forget their Username

Customers can request that their username be emailed to them from the ePay login page. CAPTCHA validation is also supported with this feature.

Credit Card Expiration Report and Notification e-mail are now available for ePay with the PayFabric option enabled

Terms and Conditions Agreement

The Administrator user can now setup a detailed Terms and Conditions agreement. Different agreements can be configured and enabled for Online Bill Payment, Express Payments, Saving Credit Card information and AutoPay contracts.

Terms and Conditions Log

When the Customer user accepts the Terms and Conditions Agreement, the acceptance will be kept in a detailed log which will track the user and time the agreement was accepted.

Test Mode for emails

This option allows ePay to only send e-mails within a specified domain. This feature is ideal for users who import their ePay system into a test environment and do not want to risk emails being sent to customers from the test system.

Web Based ePay Scheduler

A new Web Based Scheduling system has been developed for ePay to use rather than the previous Nodus Scheduler. This will simplify the deployment and the maintenance for the ePay site. Scheduled jobs can be individually enabled and disabled directly from the administrative portal.

Security Enhancement for Single Sign-On

A new token based security enhancement is available for the ePay Single Sign-On process.

Update Wallet Entries from the Credit Card Expiration Report

CSR Users with access to the Credit Card Expiration Report can update the expiration date and billing address information directly from the report.

Additional Processing Fee for Online Bill Pay

An additional fee can be added to payments made by users when logged into the ePay portal. This fee can be based on a fixed amount or a percentage. Many configuration options are available for this feature such as a charging a fixed amount or percentage of the cost, applying the fee to credit card or ACH transactions, and naming the fee as desired.

Additional Processing Fee for AutoPay

The entire additional fee feature has been implemented separately for the AutoPay module so a separate fee amount, name and message can be configured for automatic payments.

Subsidiary Account Management Enhancement

Many enhancements have been added to the ePay portal for parent accounts to make a payment for subsidiary (child) accounts. The parent can now make a single combined payment across subsidiary accounts. An account filter has been added to allow the parent account to limit their view to certain subsidiary accounts for various pages across the site.

AutoPay for Parent Accounts

AutoPay contracts can now be configured for parent accounts to pay for children accounts automatically. Options to pay for all the children accounts, or only a subset of children accounts are available.

New Variables for the Past Due Invoices Reminder

The variables for the Net Account Balance and the Past Due Balance can now be added to the Past Due Invoices Reminder e-mail template.

Configurable option for automatic Customer Registration email

The Customer Registration e-mail can now be configured to be automatically sent when a new customer is imported into ePay or only manually sent from the 'Register Customer' page

Invoice Template for Express Pay

The Express Pay page has been adjusted to allow the user to view the customized Invoice Display.

RESTful API web services

A RESTful API has been created to allow for applications to integrate with ePay. Many services have been added such as the ability to import invoice PDF documents to the ePay website.

Ability to accept customer email updates from the back office ERP after registration

This option has been added to allow email updates from the back office to be reflected against a registered customer account in ePay. This configuration is ideal for implementations utilizing Single Sign-On integration where the customer email address is not managed on the ePay account.

Support For Dynamics GP2015 and GP 2015 R2

ePay Advantage Version 5.0 Service Pack 1

Change Details

Support for .PDF file to be shown for invoice display

The administrator can new configure the display of the invoice details for ePay users to view either the invoice display from ePay's data or from a .PDF file accessible from the web server.

Zip Code validation can now be enabled separately from Address verification for Credit Card transactions

An option has been added to validate against the zip code when processing credit card transactions to reduce the chance of credit card fraud without requiring validation against the entire address.

Ability to view the line item details on a return document

In the previous version, minimal detail was provided for the user when viewing a return document. On a return document, the line item detail is now also provided for the user to view.

Password expiration can be disabled for customer users

In ePay 5.0, the password expiration features would be applied to all user groups. This feature allows for the password expiration feature to apply to CSR and Admin users but not for customer users.

Allow landing page for Single Sign-on

When utilizing single sign-on, a landing page can now be specified when passing the user into ePay from another application.

Allow for additional user names for Single Sign-on

Single Sign-on now support multiple user names for additional accounts for the same customer user.

Allow the user to make a prepayment from the 'Outstanding Invoices' page without selecting any invoices

In the previous version, the user had to make an individual prepayment from the 'Process Prepayment' page if they did not want to also pay an invoice. This can now be done directly from the 'Outstanding Invoices' page.

Additional Security Enhancements

Additional security enhancements have been made across the product to keep ePay Advantage up-to-date with various security scanning software

Enhancements to the data sent to Avatax™ for the Recurring Invoicing Module

The Customer Number and the Invoice Number are now sent to AvaTax™ so transactions can be easily identified on the Avatax™ portal.

Configurable Option to reduce the Payment Amount for scheduled overpayments

With 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.

Support for Dynamics GP 2013 R2

Support for SQL Server 2014

ePay Advantage Version 5.0

Change Details

New Feature to Integrate with Nodus PayFabric for electronic payment processing & data storage

PayFabric is the Nodus' hosted, cloud-based processing engine. Bundled with PayFabric, ePay helps merchants achieve PCI Compliance more easily by collecting sensitive credit card information on a web form hosted by PayFabric and securely pass them along with transaction data securely to payment gateway server(s).

With PayFabric, the point of entry for credit cards, transaction processing, and data storage no longer belong to ePay site; therefore, it will reduce the complexity of PCI Compliance self-assessment process for merchants.

Add Credit Balance & Net Balance on Account Summary

Add 'Total Available Credit' into Account Summary page so user can check the total available 'unapplied' credit amount for his/her account.

Add 'Net Balance' into Account Summary page to display the total net balance (Available Balance – Total Available Credit)

Account Policies Enhancements for PA-DSS

- Enhanced Account Policy
  o Password history & password aging
  o Account Locks
  o Digital signing for installation files
  o Application Logs
- Enhanced algorithm for password storage
- Username and Password length & strength management

Ability to Remove Primary Wallet

ePay user was not able to remove/delete primary wallet entry. In ePay 5.0, Nodus adds ability for administrative user to allow or disable ePay user to remove primary wallet entry.

Add a new option 'Require Outstanding Invoice' under AutoPay Settings

This new option controls whether or not to process 'fixed balance' payment. If the option is enabled, fixed balance payment will not be processed if there are no outstanding invoices available on the account.

Remove the requirement of Primary Email to receive activation email

Add an administrative setting under Customer Options 'Require E-mail for Requesting Activation code' so the customer can enable/disable the primary e-mail requirement.

Ability to request & resend activation email (with activation link)

Customer can request for activation link & email to be resend to them if the original email was lost. Nodus also adds the ability for CSR/Admin user to resend customer's activation email from Admin Portal > Register Customer.

Ability to support assigned Customer Trade Discount from GP with Recurring Invoice module

ePay will consider assigned trade discount against customer record from GP to calculate for trade discount amount for customer against Recurring invoice module.

ePay Advantage Version 4.0 Service Pack 2

Change Details

New Feature to Provide PayPal Hosted Page Support

Bundled with Tokenization version, ePay helps merchants achieve PCI Compliance more easily by collecting sensitive credit card information on a web form hosted by PayPal and securely pass them along with transaction data securely to PayPal server.

With Hosted Page, the point of entry for credit cards no longer belongs to the ePay site; therefore, it will reduce the complexity of PCI Compliance self-assessment process for merchants.

New Feature to Provide Credit Card Expiration Report and Email Notification

Admin and Customer Support Rep (CSR) users will be able to access the expired card report for a list of expired and to-be-expired credit cards by a specified date range.

The expired card email notification can also be manually or automatically sent out to customer(s) to avoid last minute transaction decline.

A New Theme with Enhanced User Experience

- Update Search Option to allow search transactions by Date Range or by Document Number
- Enhance Wallet Entry Selection with List View
- Added Optional Prepayment Capability into Outstanding Invoices list
- Ability to Display or Hide page columns
- Reword Menus and Text Labels
- Update All Email Templates with Sample Messages
- Removal of Account Summary Graphical Charts

Admin Portal Configuration Checklist Wizard

Add a Configuration Checklist into Admin Portal to assist with setting up and configuring the ePay web portal.

New Feature to Support GP Term Discount

Synchronized Customer's assigned Payment Term ID from GP Customer Maintenance so term discount is accounted for when payment is paid by a specified discount date. Feature can be enabled or disabled if needed.

New Feature to Email Paylink as Express Pay Option

ePay is able to email a payment link that customers may click and make a one-time payment without having to login to ePay.

Security Enhancement

- Improved Forgot Password & Password Retrieval Process
- Added additional level of security for Account Activation
- Ability to enforce security restriction for ePay's Username and Password

New Feature to Support eCheck Account Type

Ability to define the account type for eCheck entry, whether 'Checking' or 'Savings'

Ability to Hide On-Hold Customers from Customer Lookup List

CSR user may choose to hide GP's on-hold customer accounts from ePay's Customer Lookup List.

Enhancement of User Management via Admin Portal

- Ability to update admin user's email address
- Ability to unlock a user login after maximum login attempts have been reached

Enhance Processed Payment Report

- Add Scheduled tab to list any payment that is still scheduled to be processed
- Add Failed Attempt Count to list the number of attempts for reprocessing and the reason why it failed to process.

Add Additional Variables into Email Templates

[[[ShipToAddress]]]: Ship To Address

[[[BillToContact]]]: Bill To Contact

[[[PO#]]]: PO#

New Feature to Email Paylink Notification

Allow CCA (Credit Card Advantage) user to send a payment link to end-customer so payment information can be entered via ePay's web page. Since credit card information doesn't have to be entered within Dynamics GP window, this will help simplify PCI requirements. (Available only on Tokenization version of ePay)

Add Total Balance Due on Account Summary

Add 'Total Balance Due Amount' into Account Summary page so user can check the total outstanding amount for his/her account.

ePay Advantage Version 4.0 Service Pack 1

Change Details

Mobile Support

For this release, it comes with a standalone site dedicated for mobile devices. Currently, it is designed to recognize iPhone, Android mobile phones and has the ability to auto-redirect users to the mobile version of ePay site.

AutoPay Contract Module has End Date

AutoPay Contract user now can specify the 'End Date' for AutoPay Contract. The available options for End Date can be chosen among the following three:

- No End Date
- End After Certain Number of Occurrence(s).
- End by Date

Ability to Support Google Mail Server and non-standard exchange port.

ePay is now able to support Google Mail Server and non-standard exchange ports (anything other than port 25).

Ability to assign card name to eCheck type

Customer with multiple eCheck card names in GP is now able to configure the preferred eCheck card name with the eCheck payment type on ePay.

Ability to support Tokenization with Paymentech/Orbital gateway

ePay is able to support tokenization with Paymentech/Orbital gateway.

Ability to separate Recurring Invoicing & Recurring Payment modules

Recurring Invoicing and Recurring Payment used to be bundled together to create ePay's Recurring Billing module. They're now separate into their own module.

Improve Performance on ePay and eliminate memory consumption.

ePay codes has been updated to eliminate memory consumption and streamline/improve performance.

Add Pagination into View Contracts

Add paging to View Recurring Billing/Installment/AutoPay Contracts.

Security Vulnerability Enhancement

ePay codes have been enhanced to avoid any website security vulnerability issues.

Allow to Add Backordered Quantity on Invoice Document Type

eSOP has been enhanced to allow backordered quantity on an Invoice Document Type.

Ability to Configure Transact Advantage Connection String on ePay

ePay has been enhanced to allow user to bypass the Connection Manager to configure gateway connection string directly on ePay portal in case it is needed.

Add Customer ID into Email Templates

ePay has been enhanced to include additional variables into the existing email templates. All existing variables have been revised to maintain consistency across all email templates.

Support eCheck Card Name Mapping

Each ePay site can now has its own card name mapping for eCheck to match with Dynamics GP instead of using the default 'eCheck' value.

ePay Advantage Version 4.0

Issue Details

PA-DSS Compliance: ePay Advantage has been PA-DSS (Payment Application Data Security Standard) audited and certified.

Tokenization Support (optional): Support Tokenization Technology to Allow Off-Premises Secure Storage of Sensitive Credit Card information to Facilitate PCI Compliance Effort.

Additional Reports: New reports have been added to assist in audit and reconciliation efforts. These reports include:

- Installment payments
- Installment contracts
- Recurring billing

Past Due Reminders: An automated e-mail reminder can be generated for past due invoices.

The site administrator can designate specific day of the week or date(s) of the month when the reminder is sent. The e-mail template used for the reminder e-mail is customizable.

Spreadsheet export: This feature helps the overall accounting reconciliation and audit process by allowing reports to be exported to Excel spreadsheets.

Audit Trail Reports: Audit logging and corresponding report created to track payment activities

Administration Setting Changes:

- Disable 'Allow Pay Later'
- CSR Default Landing page
- Customer Default Landing page
- Email template for failed document submission
- HTML view for payment details in document queue
- HTML view for Invoice details in document queue
- ePay version number in admin portal menu bar
- Upload Logo feature

CAPTCHA Anti-Spam: Enables verification of customers to block internet spam programs

Recurring Billing Contract – Add Start and End date for line items: Allows users to establish start and end dates for individual line item in a recurring billing contracts.

Additional Customer Account Log-ins: Each GP Account will be allowed multiple ePay Log-ins.

Also, account management page for main Account created to assist in managing log-in accounts.

Additional Administrative Permissions for CSRs:

Scope of administrative permissions expanded for CSRs. Permissions can now be granted for specific administrative pages, such as the document queue.

Recurring Billing module changes:

- Allows new empty contract loaded when previously-created contract completed
- Allow negative quantity for non-inventory items
- Support on-hold customer status and ability to skip to next cycle for recurring billing

ePay UI Changes: Multiple changes made to how the Administrative section is organized, including sub-menus added to several sections

eSOP Quantity Shortage Options: Options added to the Quantity column for eSOP, including:

- Sell Balance
- Override Shortage
- Backorder
- Revise Quantity

Apply Existing Credit: A page has been created to help manage application of existing credit to customer's outstanding invoices.

Avalara Tax Integration (optional):

Support integrated tax engine with Avalara.

Options for eSOP orders with out-of-stock status, back ordered quantity that are not submitting to GP as back ordered: eSOP orders with 0 quantity are not submitting to GP as

back ordered items. They are getting submitted as fulfilled quantity. ePay Advantage has been enhanced to provide user with the following options to choose when the item is out-of-stock:

- Override Shortage

- Revise Quantity

- Back Order

- Sell Balance

If user selects 'Back Order', the item will be integrated into GP with backordered quantity.

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