NODUS

A **Global Payments** Company

PayFabric User Guide

June, 2026

PayFabric®

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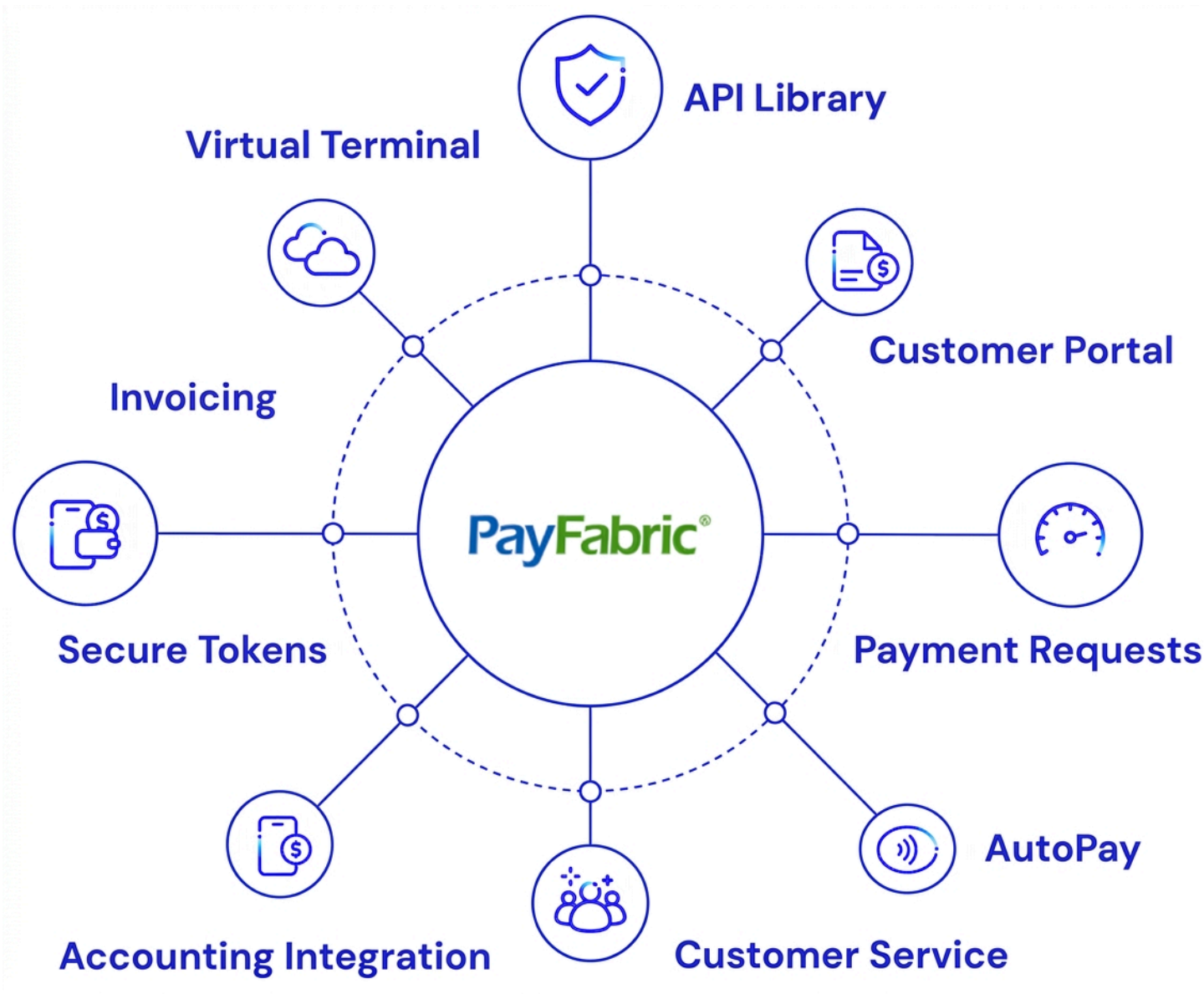
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Introduction to PayFabric

PayFabric is a cloud-based payment acceptance platform and storage hub that can be integrated with any application, platform, and back office environment with ease and simplicity. PayFabric offers real-time transaction processing for both credit card and eCheck transactions while meeting the highest standards of security.

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PayFabric helps merchants reduce the scope of their PCI compliance by helping to remove credit card access from applications. By connecting to PayFabric, 3rd party applications are relieved of any access to sensitive credit card numbers. PayFabric can easily be integrated with applications to allow for shared management of customer's credit card and eCheck data.



This document covers how to configure and utilize PayFabric features and functionality.

The PayFabric service includes 2 optional add-ons services that work together to help the organization with their payment business needs:

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PayLink service

PayLink is an add-on service to PayFabric that provides businesses a fast, secure and convenient way to accept electronic payments via credit card or eCheck without PCI challenges. It provides a simple way to integrate electronic payment acceptance into any application.

More details on PayLink service is available here.

Receivables service

PayFabric Receivables is an add-on service to PayFabric that provides businesses the tools to streamline their online bill presentment and payment needs.

More details on Receivables service is available from the link below:

http://www.nodus.com/documentation/PayFabric-Receivables-User-Guide.pdf

API

All interaction with the PayFabric data is managed through the API. PayFabric APIs are organized around Representational State Transfer (REST) architecture and are designed to have predictable, resource-oriented URLs and use HTTP response codes to indicate API errors.

Information on utilizing the API can be found on the PayFabric GitHub page.

https://github.com/PayFabric/APIs/blob/master/PayFabric/README.md

Account Management

Nodus PayFabric Cloud service has its own web portal where merchant can setup their PayFabric account, configure their PayFabric settings, view and manage their transaction reports.

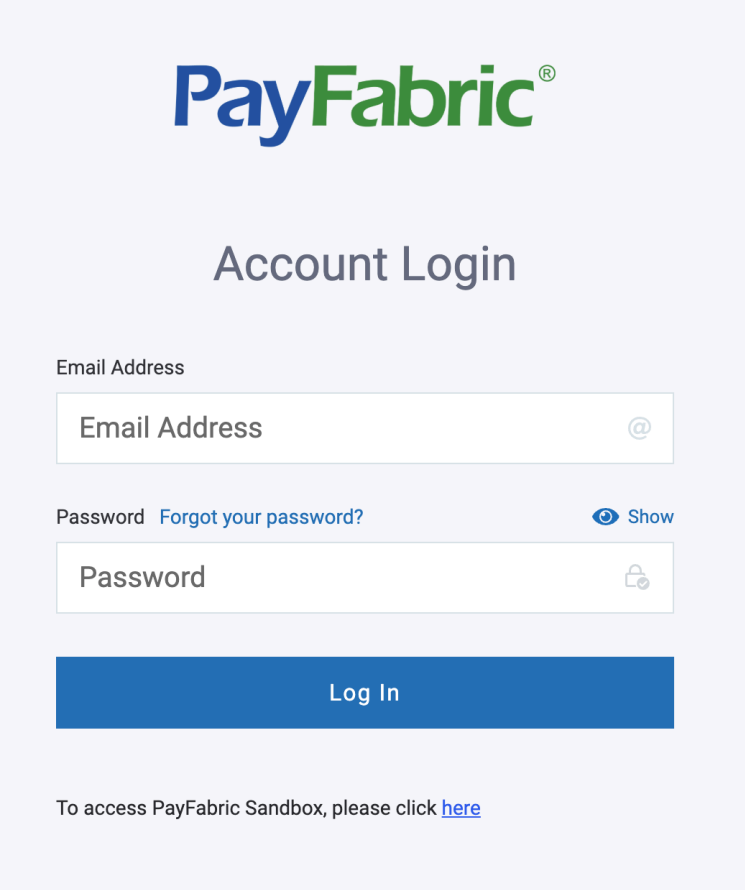
Sandbox Portal URL: https://sandbox.payfabric.com/portal

Production Portal URL: https://www.payfabric.com/portal

Account Sign-up

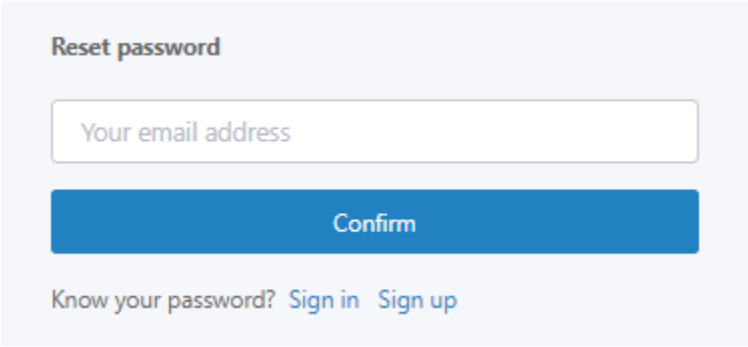
Merchant can sign up for a PayFabric account by clicking on the 'Sign up now' link on the [sandbox/production] portal main page:

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Password Reset

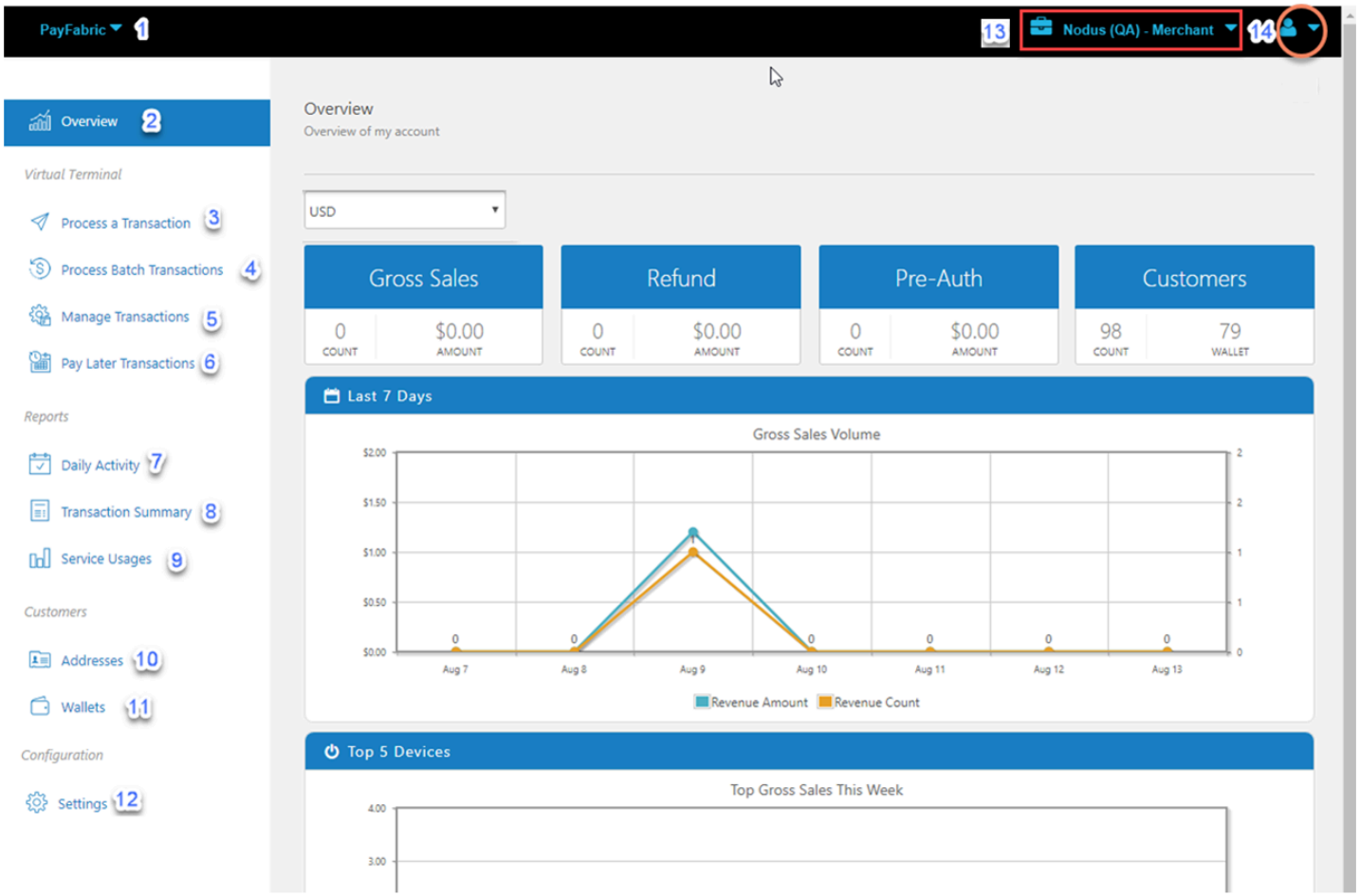
Merchant can request to reset password for an existing PayFabric account by clicking on the 'Forgot your password' link on the [sandbox/production] portal main page:



PayFabric Portal Summary

Below is the screenshot overview of the entire PayFabric portal. Each section is associated to a numerical identifier corresponding to its descriptive details.

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1. Service Drop-down

Under a single account login, user can switch to different subscribed service offering the drop-down list on the top navigation bar.

2. Overview

A quick view of transactional information based on currency selection, including:

Gross Sales: Total approved transactions, which includes "Sale and Capture (Ship)" transaction types.

Refund: Total reversed transaction, which includes "Void and Credit."

Pre-Auth (Book): All pre-authorized transactions.

Customers: Total number of customers who paid via PayFabric and total number credit card or ACH account numbers stored.

Last 7 Days: Gross sales volume of the past seven days.

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Top 5 Devices: Gross sales volume of the top five devices (Note: Device(s) refer to Payment Application(s) that use PayFabric to process payment (i.e. CRM Charge, CCA, ePay, eCommerce, etc).

Top 5 Gateway Accounts: Gross sales volume of the top five payment gateways (Note: Gateway refers to Payment Gateways such as Authorize.net, PayPal's PayflowPro, First Data's Payeezy, etc).

Failed Transactions: Transactions that have failed due to connection issues, latencies, etc.

3. Process a Transaction

Allows users to process payment (credit card or eCheck) within PayFabric Virtual Terminal (VT). See Design Mode section to pick a VT appearance that best fits for your need.

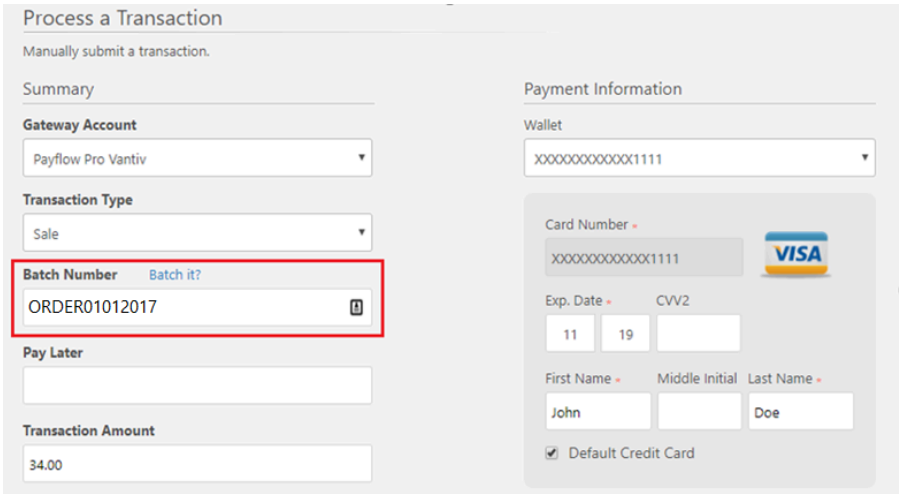
Modern Design VT: a modern UI best fit for an enhanced user experience to process any transaction.

Web Entry: this form is typically used for card-not-present transaction.

Terminal Entry: this form is typically used for card-present transaction where transactions are processed through EMV hardware payment terminal devices.

4. Process Batch Transactions

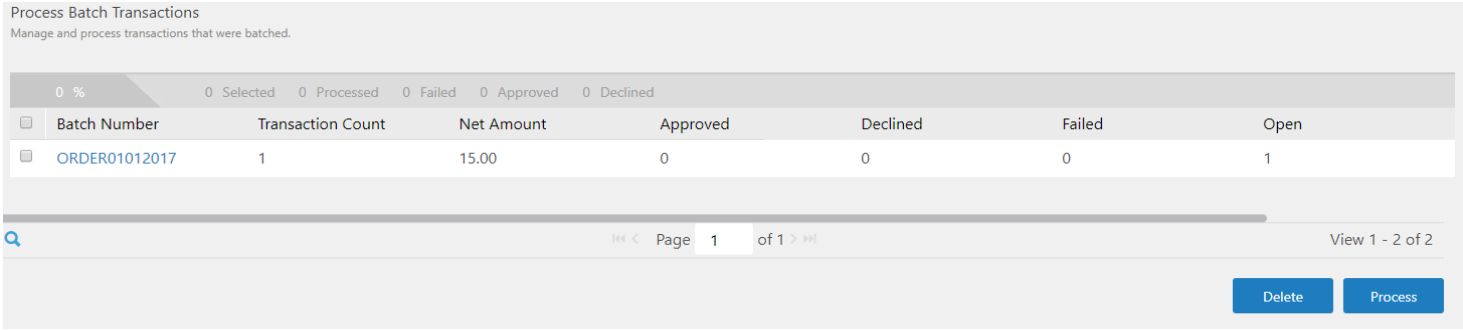
Allow user to process a group of payments based on Batch Number. Transactions can be grouped into a batch and save for later processing using 'Batch Number' field from 'Process a Transaction' virtual terminal page.



Once transaction is saved, user can checkmark the batch and click 'Process' to process all transactions grouped under that Batch Number.

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'Delete' option will remove the batched transactions from the list.

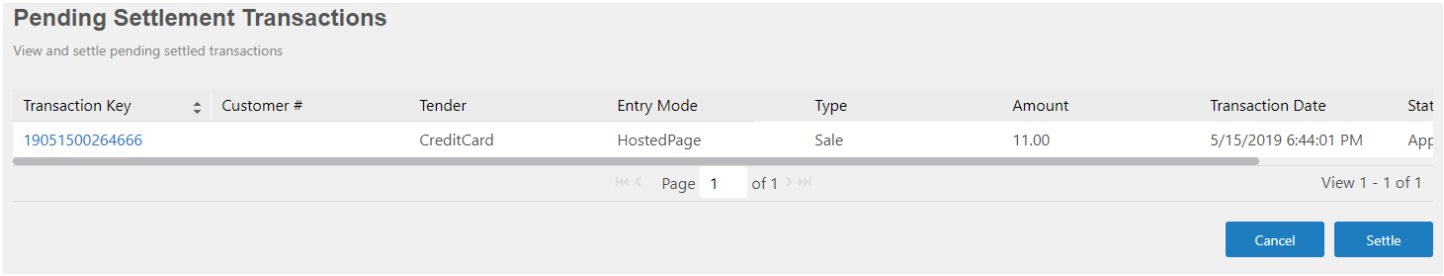


5. Manage Transactions

Allows users to view processed transactions and perform referenced transaction processing such as: "Credit (Refund), Void, and Ship (Capture)".

Pending Settlement

Under Manage Transactions report, merchant can also opt-in to manually settle existing pending transaction(s) by clicking on 'Pending Settlement' button.



Upon clicking on 'Settle', PayFabric will settle all 'pending settlement' transactions in the 'Pending Settlement Transactions' list. This list will only include the successful transactions with the following transaction types:

- Sale
- Capture
- Refund
- Force

Important Note: Auto Batch Close still occurs every day at the preset time regardless whether the merchant manual settles or not.

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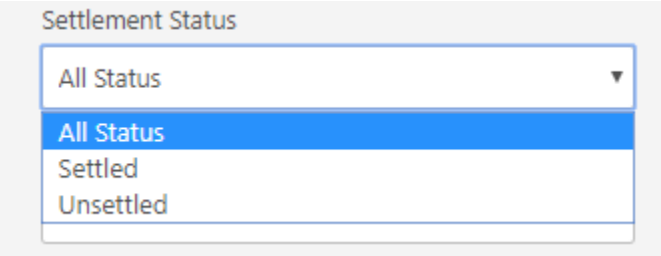
6. Pay Later Transactions

Allows users to manage transactions that were marked for processing at a later date. Transactions can be saved for later processing using 'Pay Later' field from 'Process a Transaction' virtual terminal page.

7. Daily Activity

Generates detailed transaction report based on a date range, payment method, entry mode, card type, amount range, gateway, and/or devices.

Settlement Report



Set filter under **Settlement Status** to get the settlement report based on transaction date.

8. Transaction Summary

Generates summary report based on a date range, payment method, entry mode, card type, gateway, and/or devices.

Settlement Report

Set filter under **Settlement Status** to get the settlement report based on transaction date.

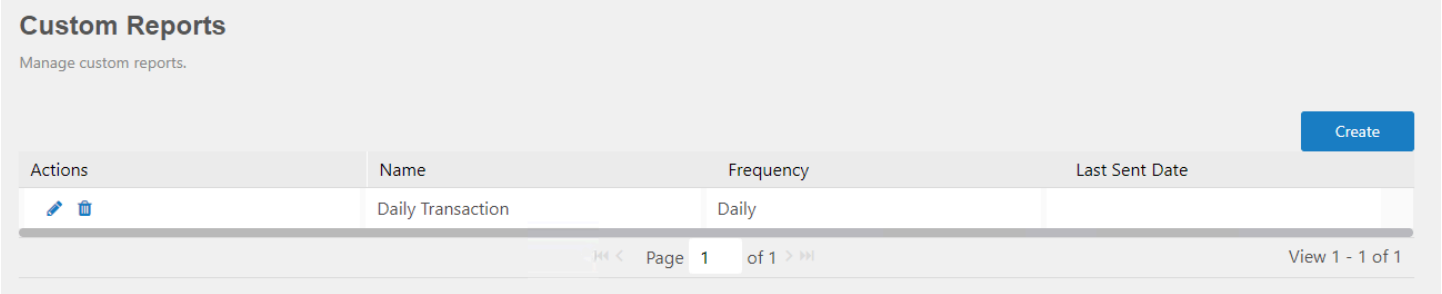
9. Service Usage

Generates PayFabric monthly usage report.

10. Custom Reports

Provides merchant the ability to generate custom transaction report(s) based on preferred filtered conditions on PayFabric portal. Custom report will be automatically generated and emailed to the user based on the specified frequency in CSV format.

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Specify the frequency of report generation: Daily, Weekly, and Monthly.

- Daily: report will be generated daily and sent out before 7am PST. The report will contain the transaction data processed from the previous day.
- Weekly: report will be generated weekly on Monday and includes the transactions from Mon-Sun of the previous week.
- Monthly: report will be generated monthly on the 1st of every month which will includes the transactions from the previous month.

Request for an immediate delivery of the custom report by choosing the on-screen default options: Last 7-day, Last 30-day, Custom Date Range within the last 9-month from the current date.

If there are no transactions processed during the specified window & conditions, there will be an email sending out with the message body: "No transaction available with this criteria."

11. Addresses

A list of customer addresses associated with their payment information.

12. Wallets

A list of payment information stored for future use. Merchant can create new or edit/delete the existing credit card or eCheck records for their customer(s).

With PayFabric's centralized wallet storage for merchant, no payment data is stored locally within merchant's network, computers or on-premises. PayFabric supports tokenization and can returned tokenized data to calling application via API calls so future recurring transaction can be referenced and processed through tokens instead of actual card data.

All communications with PayFabric is through latest TLS (Transport Layer Security) protocol over the internet. All customer's credit card and/eCheck data are managed securely as they are entered into PayFabric that meets PCI DSS requirements and guidelines.

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For more details on PCI with PayFabric, visit our PCI web page at:
https://www.payfabric.com/us/pci.html

Or visit our Security with PayFabric web page at:

https://www.payfabric.com/us/security.html

13. Settings

Setup PayFabric Gateway Account Configuration, Device(s), Theme(s) and Transaction Settings.

Gateway Account Profiles

Payment gateway account is needed to process transactions with PayFabric.

STEPS:

1. If the payment gateway account is not associated to an existing PayFabric account, under **Settings** > **Gateway Account Configuration**, click '**+ New Gateway Account**' to create new gateway profile.
2. Choose '**Use your Existing Gateway**' option
3. Fill in the remaining fields based on the payment gateway that is being used
    a. If a Gateway Account has already been setup, choose which of the supported gateways that will be used for processing transactions. Please reference Appendix A section or use the links below for your desired payment gateway provider for more details on required gateway information.

| PayPal PayFlow Pro | USAePaySOAP | Authorize.Net | CyberSource |

| CyberSourceSOAP | Paymentech | Moneris |

| Forte | Ezidebit | EVO | NMI Payment |

    b. If a gateway account is needed, please contact Nodus Technologies Support for information on setting up a Gateway Account.

4. Click the 'Save' button to save the changes
5. If there are multiple gateway accounts that need to be setup, such as if both Credit Cards and eChecks will be processed from this website, then repeat the steps in this section for each gateway account.

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Default Gateway Settings

With modern design option for Virtual Terminal, user can set a default gateway account profile for both credit card and eCheck processing options for each currency type. PayFabric will use the preset gateway details to process corresponding transaction.

Batch Close

Using **Batch Close** option, merchant can specify the automatic batch close time at the gateway profile level based on hour, minute, am/pm with the interval of 30 minutes. By default, the batch close time is set to 8PM Pacific Time.

At the specified time, PayFabric will gather all transactions that were processed from the last 24-hours from the cut-off time and will send it through to EVO processor for batch capture. PayFabric will populate the timestamp for all the pending transactions to signify they have already been batched for settlement. This timestamp will later be used for settled vs. unsettled transaction report.

For non-EVO gateways, Payfabric will not send it through for settlement, PayFabric will only populate the timestamp for all the pending transactions to mimic settlement occurring at the gateway level. **Important Note:** The timestamp specified here should match with the time used at the gateway for settlement time.

L2/3 Fields Default

Business, corporate, and purchasing cards are used just like personal credit and debit cards. However, these cards carry higher interchange rates because they offer employers high value (and costly) features such as enhanced reporting and statements. Many merchants can qualify for lower commercial rates by collecting more in-depth (Level 2 and Level 3) data with each commercial card transaction.

PayFabric is helping merchants achieve better transaction rate by supporting merchants submitting level 2 and 3 data during transaction processing. In additions, PayFabric allows merchants to setup default value for supported level 2 and level 3 fields.

When the Design Mode is **Legacy Design**, Navigate through **Settings** > **Gateway Account Configuration** > choose existing gateway account profile block > **L2/3 Fields Default**

When the Design Mode is **Modern Design**, Navigate through **Settings** > **Gateway Account Configuration** > existing gateway account profile block > **L2/3 Fields Default**, you will open the below screen. Once enabled, merchants are able to set up different Level 2 and Level 3 default values for both VISA and MasterCard respectively. The default options for both L2 & L3 are disabled by default.

Important Note: It is **highly** encouraged that merchants use actual transaction and line item data during processing instead of leveraging the defaults for Level 2 and Level 3 qualifications.

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Gateway Specific

L2/3 Fields Default is only available on the gateway profile whose Card Class is 'Credit'.

There're two ways to apply the default fields:

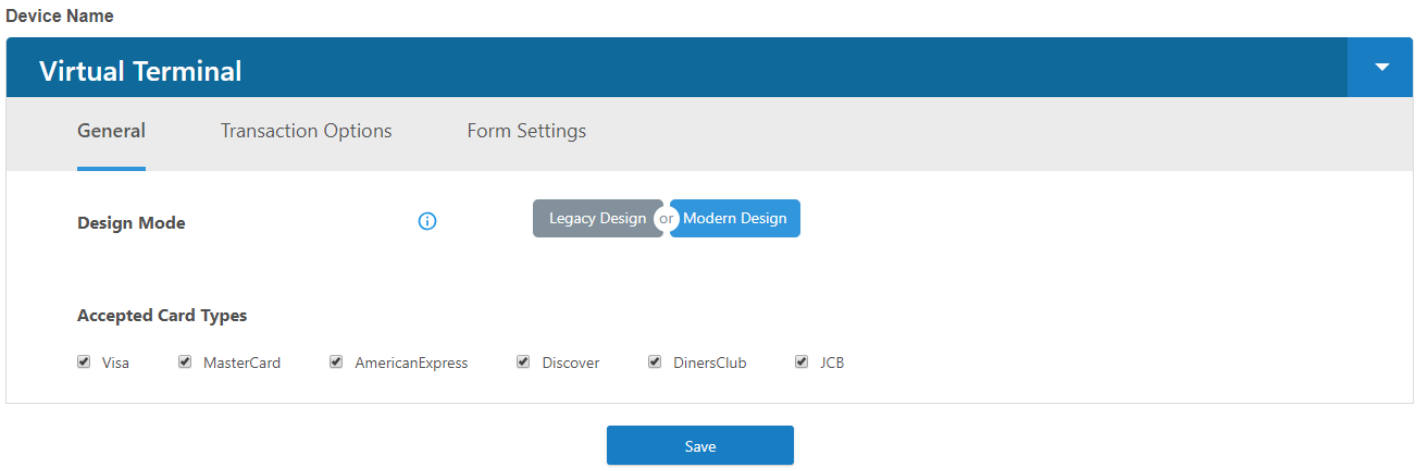
Apply PayFabric's default values for missing Level 2/3 data. By choosing this option, default values will be submitted to gateway when 3rd party application sends any level 2/3 data to PayFabric but missing fields.

Apply PayFabric's default values to fields at all times. By choosing this option, default values will be submitted to gateway at all times even if 3rd party application does not submit any level 2/3 data.

DEV Central

PayFabric Settings

To configure transaction-related settings, navigate to **Settings** > **DEV Central** > **PayFabric Settings**. Please see the detailed description for each corresponding section below.



Device Name

The drop-down consists all existing devices associated with the PayFabric account. PayFabric enable user to configure different transaction settings for every device. Choose the corresponding device from the drop-down list, then begin making changes to the settings.

Design Mode

Define the preferred design for PayFabric Virtual Terminal.

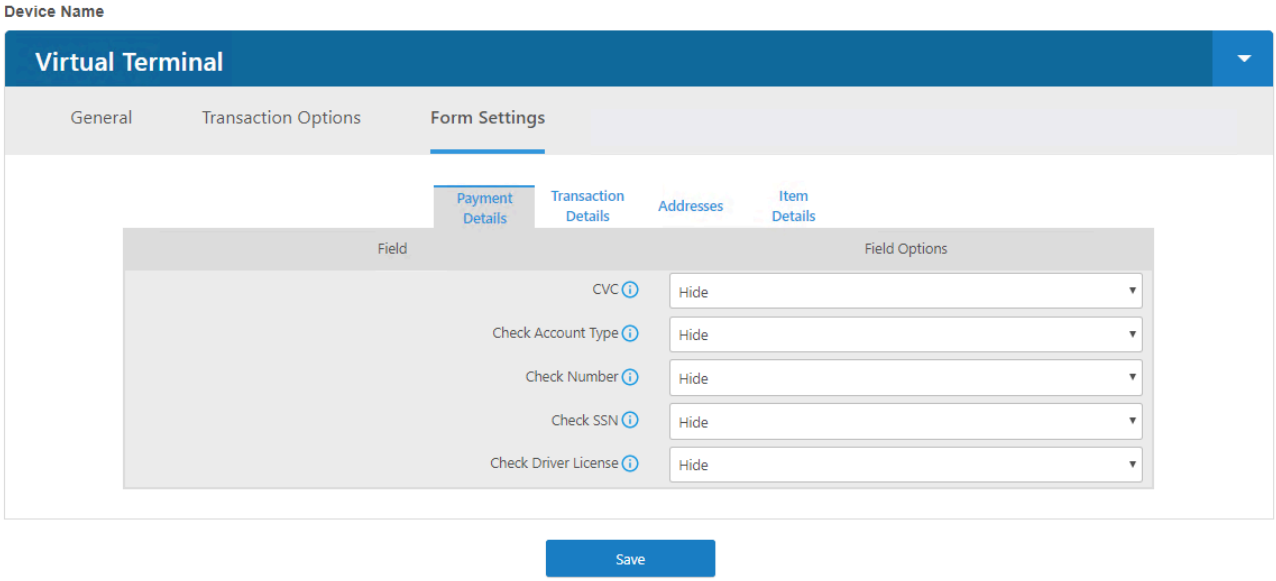
Legacy Design – the layout and style of the legacy design mimics the PayFabric Transaction API calls in a 2-steps process.

Modern Design – a single page virtual terminal redesigned for ease of transaction processing.

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Form Settings

This form settings page provides users the ability to determine which fields to display/hide/required on the virtual terminal's web entry page for modern design.



Available Field Options:

Required – displayed & required to be populated with data during transaction processing on Virtual Terminal. Required field will be displayed with an asterisk (*) next to the field label. (see below screenshot for reference)

Optional – displayed but does not required to be populated with data during transaction processing on Virtual Terminal.

Hide – hidden from user on Virtual Terminal.

Data Level Qualification - Upon selected, this option will dynamically display this field to user as required ONLY if the card level type through BIN Range validation is purchasing card/business/corporate/commercial card for L2/L3 qualification.

Payment Details tab	
Field	**Field Definition**

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CVC	Card Security Code field for credit card transaction.
Check Account Type	Check Account Type for eCheck/ACH transaction, either: - Checking - Saving
Check Number	Check Number for eCheck/ACH transaction
Check SSN	Social Security field for eCheck transaction. Only required for Telecheck as the ACH processor with PayPal Payflow Pro gateway.
Check Driver License	Driver License field for eCheck transaction.
Transaction Details tab	
Field	**Field Definition**
Customer Number	Customer Number or Customer Code on a transaction With either **optional** or **hide** option, there is option to map value from the following fields as Customer Number when sending to payment processing gateway/processor. This is typically used when a transaction is missing a customer number. - Cardholder Name

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Invoice Number	Invoice Number on a transaction, typically required as Level 2 data qualification With either **optional** or **hide** option, there is option to map value from the following fields as Invoice Number when sending to payment processing gateway/processor. This is typically used when merchant does not have actual Invoice Number in their business practice. - PayFabric Transaction ID - PO Number **Note:** If PO Number is used, make sure the PO Number field option is set to be **required**.
PO Number	PO Number on a transaction, typically required as Level 2 data qualification With either **optional** or **hide** option, there is option to map value from the following fields as PO Number when sending to payment processing gateway/processor. This is typically used when merchant does not have actual PO Number in their business practice. - PayFabric Transaction ID - Invoice Number **Note:** If Invoice Number is used, make sure the Invoice Number field option is set to be **required**.
Tax Amount	Tax Amount for a transaction
Duty Amount	Duty Amount for a transaction
Freight Amount	Freight Amount for a transaction
Discount Amount	Discount Amount for a transaction

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Handling Amount	Handling Amount for a transaction
Ship from Zip	Ship from Zip details for a transaction, typically required as Level 2 data qualification
Company Name	Company Name for a transaction
Commodity Code	Commodity Code for a transaction
Tax Exempt Number	Tax Exempt ID/Number for tax exempt customer
Addresses tab	
Field	**Field Definition**
Billing	
Country	Billing Country
Street	Billing Street
Street2	Billing Street2
Street3	Billing Street3
City/Province	Billing City/Province
State	Billing State
Phone	Billing Phone Number
Email	Billing Email Address

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Shipping	
Country	Shipping Country
Street	Shipping Street
Street2	Shipping Street2
Street3	Shipping Street3
City/Province	Shipping City/Province
State	Shipping State
Phone	Shipping Phone Number
Email	Shipping Email Address
Item Details tab	
Field	**Field Definition**
Item Number	Item Number on a transaction, typically required for Level 3 qualification
Description	Item Description on a transaction, typically required for Level 3 qualification
UoM	Item Unit of Measure on a transaction, typically required for Level 3 qualification
Quantity	Item Quantity on a transaction, typically required for Level 3 qualification

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Cost	Item Unit Price on a transaction, typically required for Level 3 qualification
Discount	Item Discount on a transaction
Tax	Item Tax on a transaction
Tax Rate	Item Tax Rate on a transaction
Commodity Code	Item Commodity Code on a transaction
Item Amount	Item Total Amount on a transaction, typically required for Level 3 qualification

Note: this **Form Settings** option is only available in modern design.

Reset to Default option

Upon clicking on this button, Form Settings will reset all field options to the defaults specified on the spreadsheet. Below are the default values for all fields.

Tab	Field Name	Field Options (Default)
Payment Details	**CVC**	Optional
	Check Account Type	Hide
	Check Number	Hide
	Check SSN	Hide
	Check Driver License	Hide
Transaction Details	**Customer Number**	Optional
	Invoice Number	Optional
	PO Number	Optional
	Tax Amount	Data Level Qualification
	Tax Exempt Number	Hide
	Duty Amount	Hide
	Freight Amount	Hide
	Discount Amount	Hide
	Handling Amount	Hide
	Ship from Zip	Hide

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	Company Name	Hide
	Commodity Code	Hide
Addresses		
Billing Address	**Country**	Hide
	Street Address	Optional
	Street Address 2	Hide
	Street Address 3	Hide
	City	Optional
	State/Province	Hide
	Zip/Postal Code	Required
	Phone	Optional
	Email	Optional
Shipping Address	**Country**	Hide
	Street Address	Hide
	Street Address 2	Hide
	Street Address 3	Hide
	City	Hide
	State/Province	Hide
	Zip/Postal Code	Hide
	Phone	Hide
	Email	Hide
Item Details	**Item Number**	Data Level Qualification
	Description	Data Level Qualification
	UoM	Hide
	Quantity	Data Level Qualification
	Cost	Hide
	Discount	Hide
	Tax	Hide
	Tax Rate	Hide
	Commodity Code	Hide
	Item Amount	Hide

Accepted Card Types

Define the supported card type(s) by marking the card types from the list.

Transaction Options

These are settings relate to process a payment transaction. Please refer to the table for detailed description below.

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Field	Definition
Fail On Zip Mismatch	Payment gateway verifies the zip code. By checking this option, By checking this option, PayFabric will automatically void any approved payment if the zip verification failed by the gateway/processor.
Lock Transaction Amount	If this option is check marked, system will prevent user from changing the transaction amount on PayFabric's hosted payment page. Note: This option is only available in legacy design.
Lock Gateway Account	If this option is check marked, system will prevent user from changing the gateway account profile on PayFabric's hosted payment page. Note: This option is only available in legacy design.
Fail On CVV2 Mismatch	Payment gateway verifies the CSC (Card Security Code). By checking this option, PayFabric will automatically void any approved payment if the CSC verification failed by the gateway/processor.
Shipping Address Required	By default, shipping address is not required as processing transactions. Checking this option to enable this logic.
Partial Capture	This option is for capturing a pre-authorized transaction. By default (uncheck), the capturing amount must be same with pre-authorization. By checking this option, merchant allow the capturing amount less than the original pre-authorization transaction.
Partial Refund	If this setting is toggle to **yes**, it provides merchant the ability to process partial refund against PayFabric's virtual terminal.

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Pre-populate L2L3 Default Values	If this setting is toggle to **yes**, PayFabric will pre-populate any preset **L2/3 Fields Default**'s values when loading L2L3 data form during transaction processing.
Lock Transaction Type	If this option is check marked, system will prevent user from changing the transaction type on PayFabric's hosted payment page. Note: This option is only available in legacy design.
Fail On Address Mismatch	Payment gateway verifies the billing address. By checking this option, PayFabric will automatically void any approved payment if the address verification failed by the gateway/processor.
Lock Currency	If this option is check marked, system will prevent user from changing the currency type on PayFabric's hosted payment page. Note: This option is only available in legacy design.
Popup Message	If this option is check marked, system will display response or error message to end-user using popup message instead of inline within PayFabric's hosted payment page and hosted wallet page. Note: This option is only available in legacy design.

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IP Address Validation for Security Token	Add additional validation around the usage of security token on PayFabric by embed IP Address validation around the usage of PayFabric security token against the PayFabric's API calls. By default, this setting is enabled. If enabled, PayFabric will validate the security token's IP address. If the IP address associated with the security token at the time of token creation does not match the security token at the time of token consumption, PayFabric will return the 'failed authentication' error during API calls. If disabled, PayFabric will not validate the security's token IP address during API calls. Note: this setting is not available on virtual terminal device.
Enable BIN Range Validation	Toggle the option to 'Yes' to enable BIN Range validation on all credit card data to determine the card validation type (for surcharge support) and/or card level (for L2/L3 support). If card validation type is debit/prepaid, PayFabric will not apply surcharge to the transaction. If card level is a non-purchasing card, PayFabric will exclude L2/L3 data when submitting to gateway/processor. By default, this option is set to 'No'(disabled).
Transaction Key Prefix	User defined prefix for PayFabric transaction key.
PostURL	PayFabric will post transaction response data (Non-sensitive fields) to this URL once this transaction is processed (successful or failed)
Maximum History Cards	Limit the number of wallet entries loaded on PayFabric hosted pages by specify the number of saved card. The default value is 10.

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Return URL	A URL address that PayFabric can redirect to once a transaction is processed. The response fields will be encoded and attached into query string. Note: This option is only available in non-Virtual Terminal device.
Maximum Shipping Address	Limit the number of shipping address(s) loaded on PayFabric hosted payment page by specify the number of saved card. The default value is 10. Note: This option is only available in legacy design.
Default Transaction Type	Specify a default transaction type for the Virtual Terminal. Note: This option is only available in modern design.
Batch Number Prefix	User defined prefix for auto-generated batch number.
Maximum Limit for Sale Transaction	Specify a maximum amount for Sale transaction for corresponding payment method (credit card & eCheck). Sale transaction will be applicable to Sale, Force and Authorization transaction types.
Maximum Limit for Refund Transaction	Specify a maximum amount for Refund transaction for corresponding payment method (credit card & eCheck).
Enabled Security Token	PayFabric will provide the ability to restrict the security token to be used in hosted page ONLY instead of both API & Hosted pages. **For APIs and Hosted Pages:** this is the default option where security token will be allow to use as the authentication method in both hosted pages and APIs. **For Hosted Pages Only**: with this option, security token will ONLY be allow to use as the authentication method in hosted pages. The API service response will fail authentication if any API calls was authenticated using security token.

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	This setting is device/application specific. By default, to maintain backward compatibility & to avoid any impacts to existing implementation, the default option will be 'For APIs and Hosted Pages'. 3rd party application can change this to 'For Hosted Pages Only' if their application only supports the ability to call PayFabric APIs via Device ID & Password. Note: this setting is not available on virtual terminal device.
Authorization Type	Merchant can set the default value for **authorization type** at the application level in case the value is not being passed from the application during API calls. *Re: Visa's Credential-on-File (COF) Mandate Support.*
Transaction Initiation	Merchant can set the default value for **transaction initiation** at the application level in case the value is not being passed from the application during API calls. *Re: Visa's Credential-on-File (COF) Mandate Support.*
Transaction Schedule	Merchant can set the default value for **transaction schedule** at the application level in case the value is not being passed from the application during API calls. *Re: Visa's Credential-on-File (COF) Mandate Support.*
Credit Card Validation Required	If enabled [Yes], PayFabric will run card validation with the gateway prior to save the card data for future use. By default, this option is disabled as there might be incurred fee for gateway that does not support card validation. Re: Visa's Credential-on-File (COF) Mandate Support.
Credit Card Validation Gateway Profile	Specify the gateway profile to be used for card validation if **Credit Card Validation Required** option is enabled.

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	RE: VISA'S CREDENTIAL-ON-FILE (COF) MANDATE SUPPORT.

Unit Of Measure Mapping for First Data Payeezy

For merchant using Payeezy gateway, item's unit of measure needs to be mapped to the values supported by the gateway. See referenced URL for valid UOM from First Data.

Reference: https://support.payeezy.com/hc/en-us/articles/203732159-Units-of-Measure

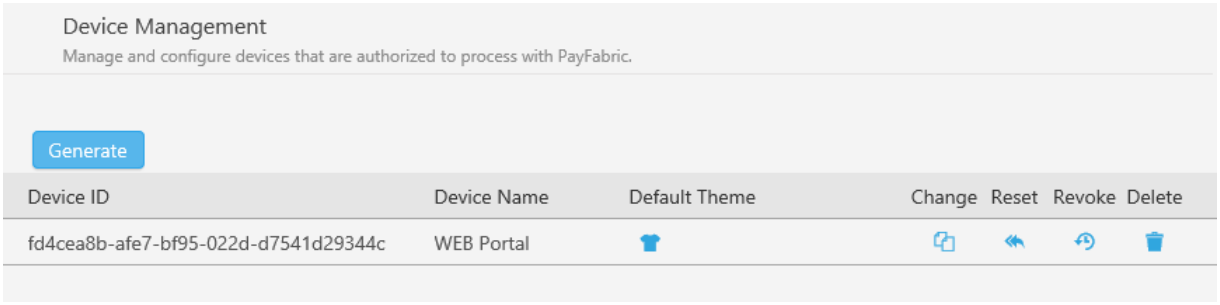
Devices

Any application [app] that utilizes PayFabric in the backend for payment processing requires a set of device & password for authentication of the API calls.

FIELD	DESCRIPTION
Device ID	A unique & secure identifier to identify different applications under a single PayFabric merchant account
Device Password	Assigned to a single device. Both device Id and device password are required when integrating with PayFabric.

Every merchants will get a **Virtual Terminal** device by default when they were creating a PayFabric account. Virtual Terminal device is generally the device that is used if user creates wallet entry or process a transaction directly from the PayFabric web portal.

To generate a new set of device and corresponding password, navigate through **Settings**. From **Settings** > **Dev Central** > **Devices** > click **Generate** button and populate fields "Device Name", "Password", "Confirm Password", and click "Save".



You can keep on adding multiple devices based on your business needs. A single device is corresponding to an application.

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Themes

Different application may have different needs of utilizing PayFabric's hosted payment page. A **Theme** can be assigned to a device to customize the layout and format of the PayFabric's hosted payment page.

The "Themes" page can be displayed by navigating **Settings** > **DEV Central** > **Themes**.

1. In the **DEV Central** section, select the 'Themes' option
2. Click the **Create New +** button and enter a name that would be relevant to the application
3. Click the **Save** button to save the changes to the theme.

Assigning Theme to a Device

Go back to **Devices** page and click on the  icon and select the desired theme to associate to the chosen device.

Besides configuring theme for device, you can also "Change" device name, "Reset" device password, "Revoke" the device, or "Delete" this device. "Revoke" device will regenerate the GUID.

Tracing

Provides user the ability to enable tracing on PayFabric. A transaction trace gives a detailed snapshot of a single transaction & its processing dataflow for troubleshooting purpose.

Note: Tracing must be disabled upon completion of troubleshooting and should not be left turn on at all times.

Email Receipt Templates

User can manage email receipt templates and corresponding content for each template based on transaction type.

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Field	Definition
Send To Customer	For each transaction type, checkmark this box to enable the email notification to go out to customers after transaction processing. By default, this option is uncheck [disabled].
Send Copy To	For a copy of transaction receipt in addition to the one sent to end-customer, populate this field with email address of the intended recipient. Multiple email addresses can be populated, separate by semicolons or commas.
Subject	Populate with the preferred email subject line for the payment transaction receipt.
Credit Card	Setup the message body of credit card transaction.
Check	Setup the message body of eCheck/ACH transaction.
Save to All Templates	Provides user a quick and easy way to save message body changes to all existing templates across all transaction types.

EMV Payment Terminals

PayFabric supports card-present transactions using EMV devices from PAX Technology. The 3 supported devices from PAX are: S300, PX7 and D210.

To configure terminal devices & settings, navigate to **Settings** > **Payment Terminals** > **Terminals**. Please see the detailed description & instruction below.

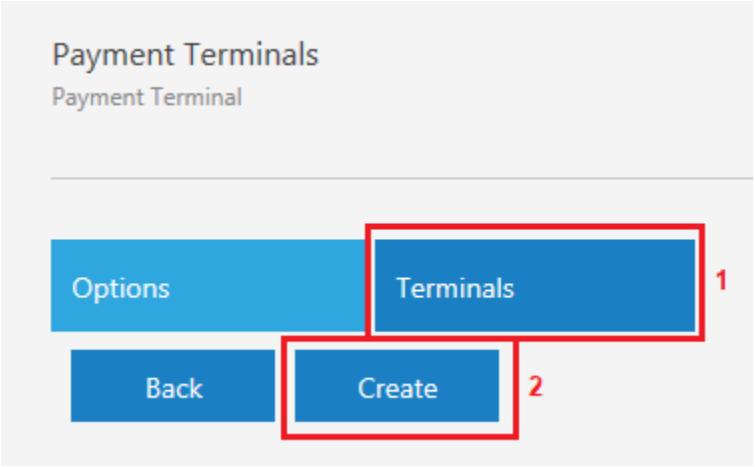
Terminals tab

Hardware terminal devices need to be created and registered on PayFabric portal prior to use within an application.

Steps:

1. From **Terminals** tab > click **Create**

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2. Populate the terminal device details & click **Save**.

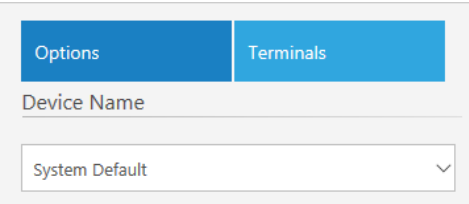
Field	Description
Terminal Name	Enter a descriptive name for the device.
Registration Mode	**Manual IP Address** – requires manual IP address entry & registering for the EMV terminal device. **DNS Provider** – this is a default option which offers the auto-registering capability for each EMV hardware terminal device based on the serial number.
Serial Number	Only applicable for **Manual IP Address** registration mode. Enter the serial number of the device, usually located on the back panel of the terminal device.
Local Network IP Address	Only applicable for **Manual IP Address** registration mode. Enter the local network IP address for the device.
Local Network Port	Populate the network port number for the device. Default is 10009
Payment Terminal Type	Use default option 'PAX Generic' for PAX's EMV device.

Options tab

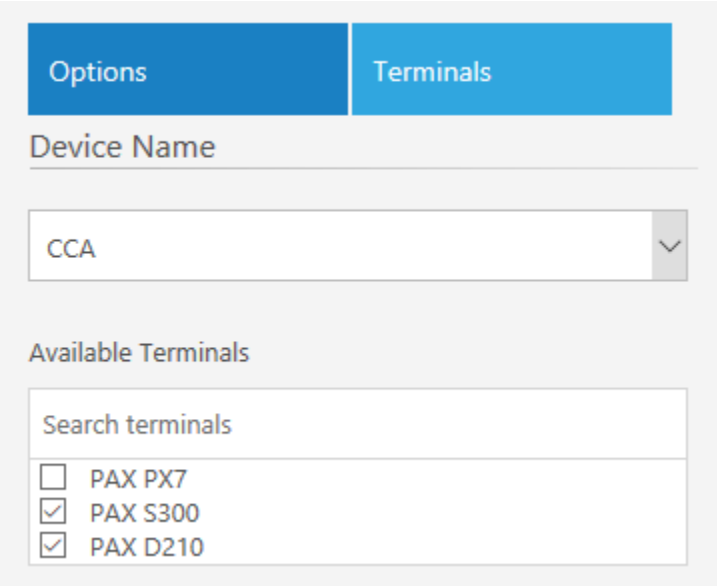
Device Name: The drop-down consists all existing devices associated with the PayFabric account. PayFabric enable user to configure different terminal options for every PayFabric device/application.

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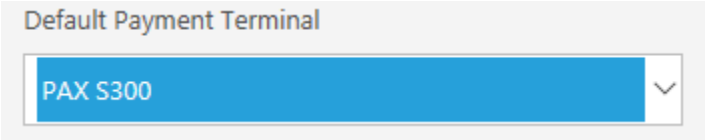
Choose the corresponding PayFabric device from the drop-down list, then begin making changes to the terminal settings.



Available Terminals: Specify the terminals available for each PayFabric device/application by tick the box next to each terminal device.



Default Payment Terminal: Specify a terminal device under this option so the selected device is always the default terminal device to be used for the application.



Processing Method:

Field	Description
Web Entry Only	Only allow transaction using web entry via hosted page
EMV Only	Only allow transaction using EMV device

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Both EMV and Web Entry	Allow both EMV and web entry

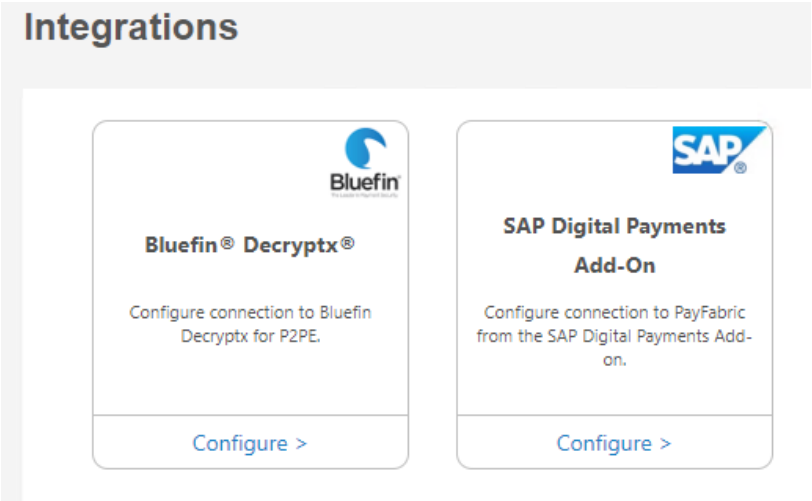
Default Processing Method: Specify the default processing method if both EMV and Web Entry option are allowed.

Only Allow Default Payment Terminal: If check marked, user will only be able to use the default payment terminal without the ability to switch to a different terminal device from the list.

Require Credit Card Signature: If check marked, customer will be required to provide signature for card-present transaction, as applicable.

Integrations

Integrations section consists of integrated 3rd party services that PayFabric supports out-of-box.



P2PE Decryptx Settings

In order to better protect card data at point of interaction, PayFabric integrates with Bluefin Decrytpx service to allow end user to pass credit card number to PayFabric's hosted page using point-to-point encryption (P2PE) device.

With P2PE, it helps with reduce PCI Scope and protects against malware in regard to card data protection.

Supported P2PE device: IDTech SRED.

Field	**Description**

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Enable	By default, Bluefin option is unchecked (disabled). If merchant would like to use P2PE device with PayFabric & Bluefin Decryptx, check mark this option.
Partner ID	Populate Bluefin Partner ID
Partner Key	Populate Bluefin Partner Key
Client ID	Populate Bluefin Client ID
Web Service URL	**Sandbox:** https://secure-cert.decryptx.com **Production:** https://secure-prod.Decryptx.com/api/
Raw Data	Enter sample raw data to ensure connection is successfully established to test the Bluefin account credentials.

Bluefin Entry Options

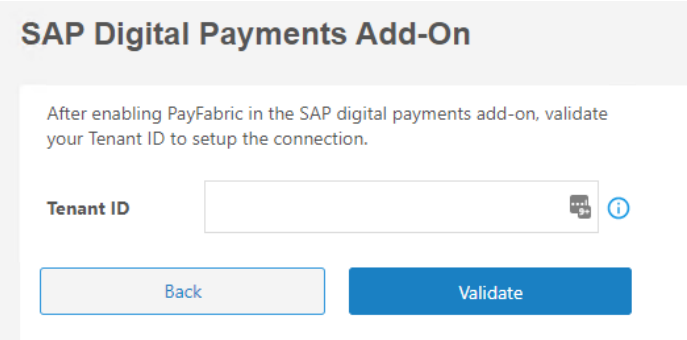
For all existing devices associated with the PayFabric account, PayFabric enables user to configure different entry option using the drop-down list.

Options	**Description**
Use Non-Encrypted Key Entry	User will use regular keyboard entry for entering card data into PayFabric's hosted page.
Use Encrypted Key Entry	User will use P2PE device for entering card data into PayFabric's hosted page.
Use Both	Enable user to switch between regular keyboard entry and P2PE device for entering card data into PayFabric's hosted page.

SAP Digital Payments Add-on

SAP has a cloud digital payments add-on (DPA) to enable merchants to connect SAP and non-SAP consumer applications with payment service providers (PSPs).

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For merchant using PayFabric as the PSP for SAP DPA, they can setup the connection between their SAP DPA organization and PayFabric using the steps below:

STEPS:

1. Clicks **Configure** under SAP DPA.
2. Populate the SAP DPA's **Tenant ID** information.
3. Clicks **Validate**.

PayFabric will perform the validation logic against the populated Tenant ID detail and once validating successfully, PayFabric will perform the following:

a. Create a **Device ID** for SAP DPA.
b. Create a **Theme**.
c. Assign the **Theme** to the newly created Device.
d. Assign the PayFabric Device to SAP DPA's organization.

Once these steps have been completed, merchant can utilize PayFabric service for transaction processing needs from SAP DPA.

Discretionary Data

Use the Discretionary Data page to specify information about data that you need to populate during transaction processing. These data will also be saved along with the transaction that are not already recorded by PayFabric. For example, you may create discretionary data element(s) for information that is unique to your business, such as: date of birth, gender, user information, or how the customer heard about your business. You can have up to 6 discretionary data fields.

Note: Discretionary data is only supported with the modern design of virtual terminal. These additional data will only reside on PayFabric and will not be sent to payment gateway or processor.

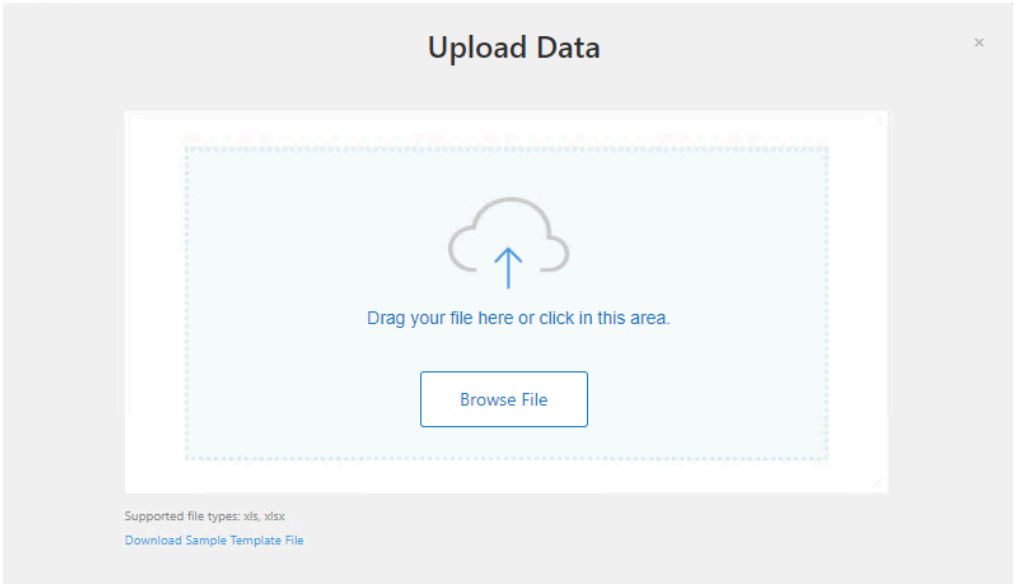
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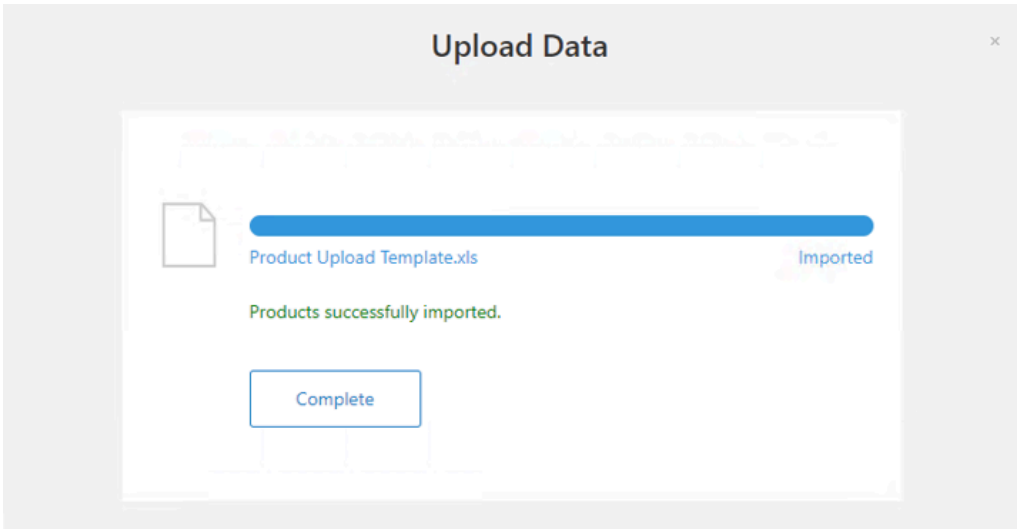
Field	Definition
Name	Provide the description of the discretionary data field that can be up to 64 characters.
Type	Specify the type of field to be displayed to user (textbox/date picker, multiple select, dropdown select)
Data Type	Specify the type or format of data that can be accepted for the discretionary data field. (Alphanumeric, Numeric, Alphabetic, Date).
Required Field Length	Specify the minimum and maximum field length that can be accepted for the discretionary data field.
Tooltip	Specify the type of data this field is meant to store and this will be displayed as a tooltip for user during transaction processing on virtual terminal.
Required Field	Specify whether this new field is a required or not required field during transaction processing.

Products

To enable merchant with quick data entry during transaction creation on VT, PayFabric provides a new option to upload products/items for quick add for line item data.

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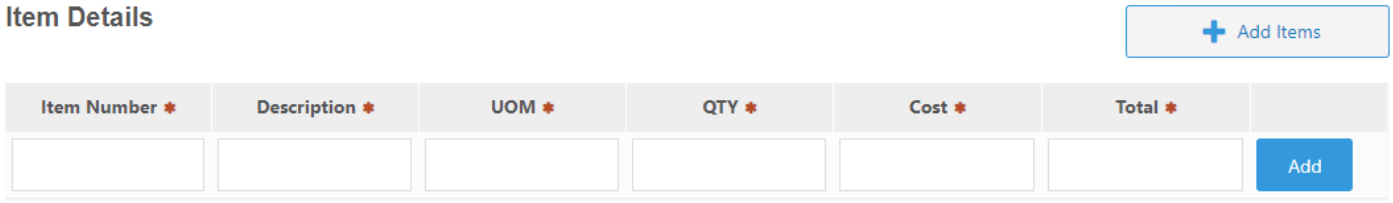




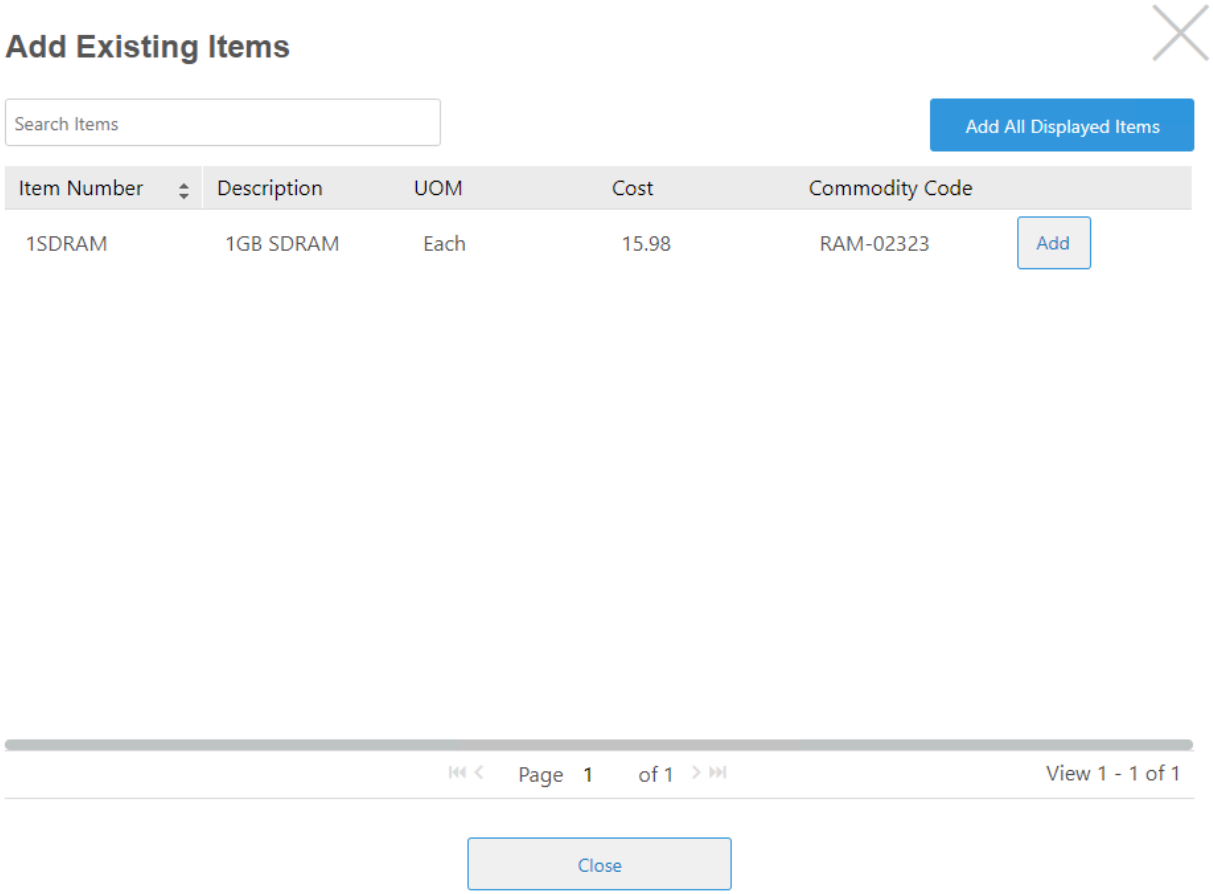
This Products page on PayFabric to view uploaded products/items. Ability to edit items will not be available at this time. Merchant can update the item details via subsequent upload. Each product upload will be treated as a brand new upload and will override existing items.

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If **Item Details** field(s) are enabled on **Form Settings**, the following section will be available under **Web Entry** on Virtual Terminal **under Process a Transaction** page. The **Add Items** button will link to all the uploaded items on the **Products** page.

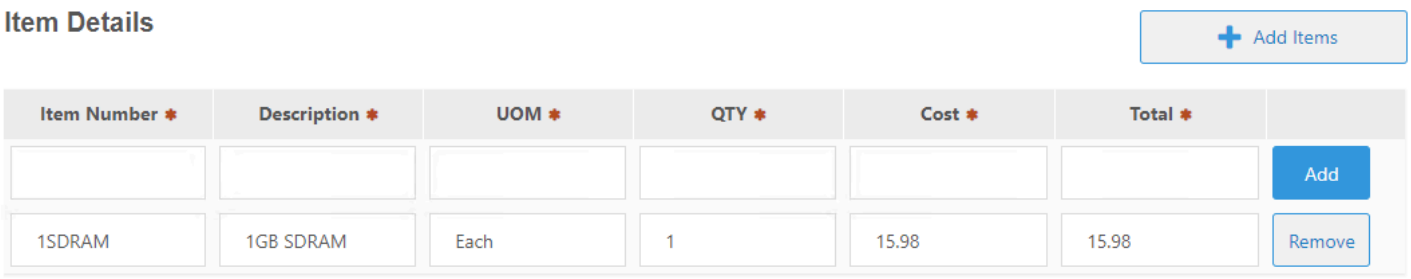


User can add item from the list using **Add** button from the item lookup.



Added item will be available on the Item Details section.

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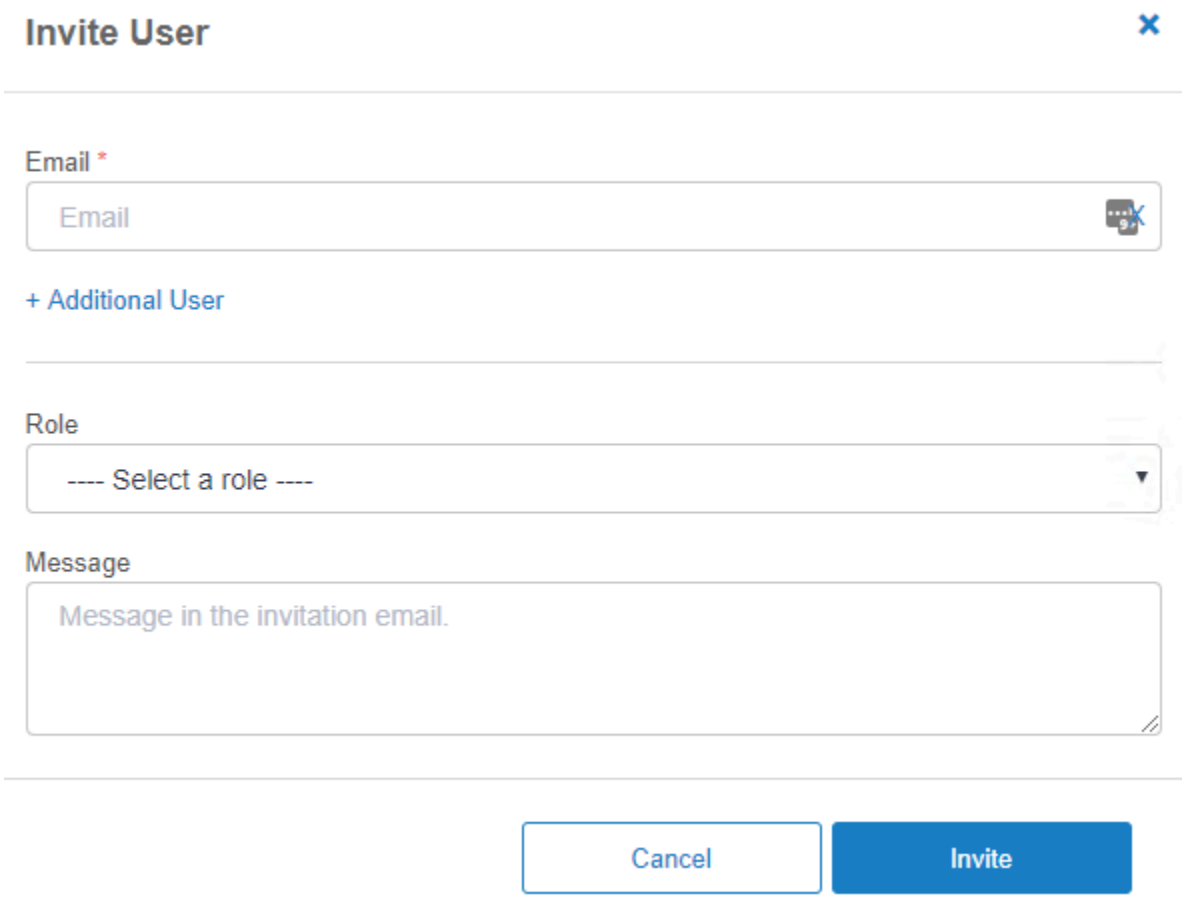
14. Organization Management

Create new organization, manage organization's billing information, invite new user(s), manage user roles, and user's security permissions.

Manage Users

Provide merchant the ability to invite new user to access PayFabric's portal. Click on the 'Invite User' button, populate the email address, and assign a role to the new user to send the invitation via email.

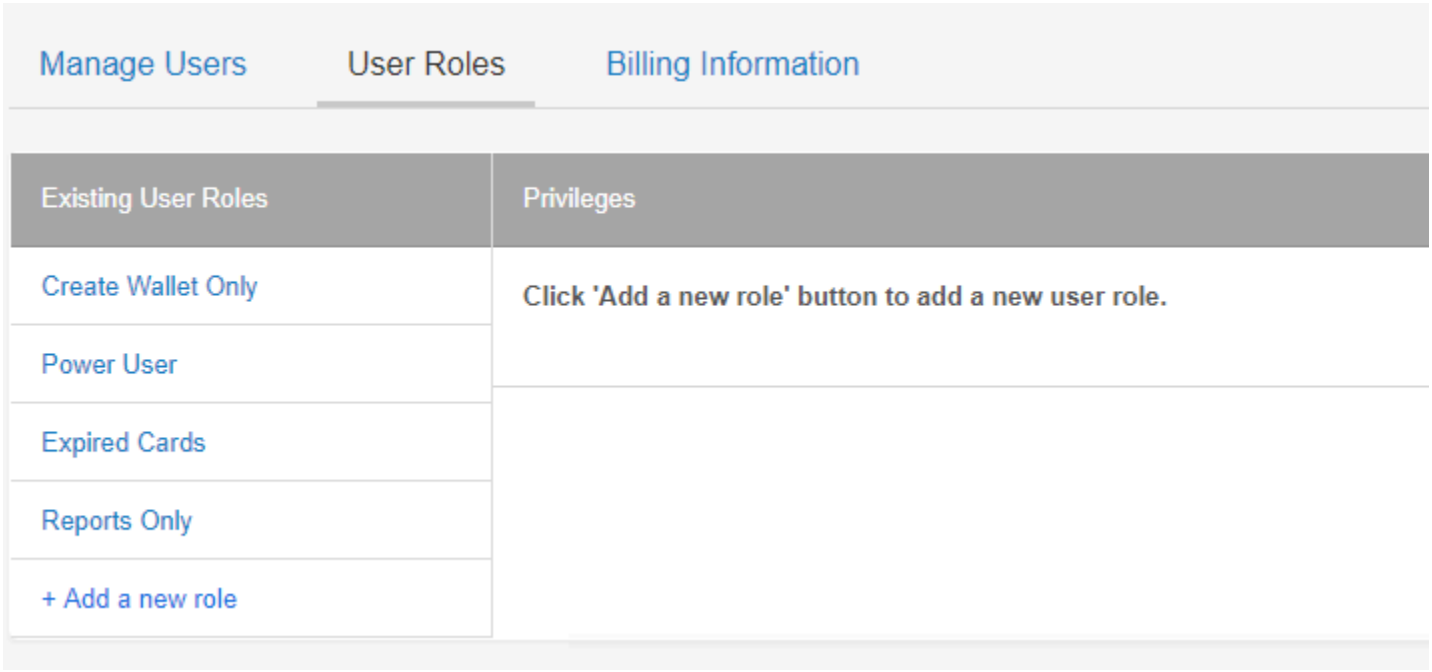
Note: If user does not have a role assigned, the user will be defaulted to 'No Role'. This is read-only mode and user will only be able to view the portal and will not have ability to make changes.

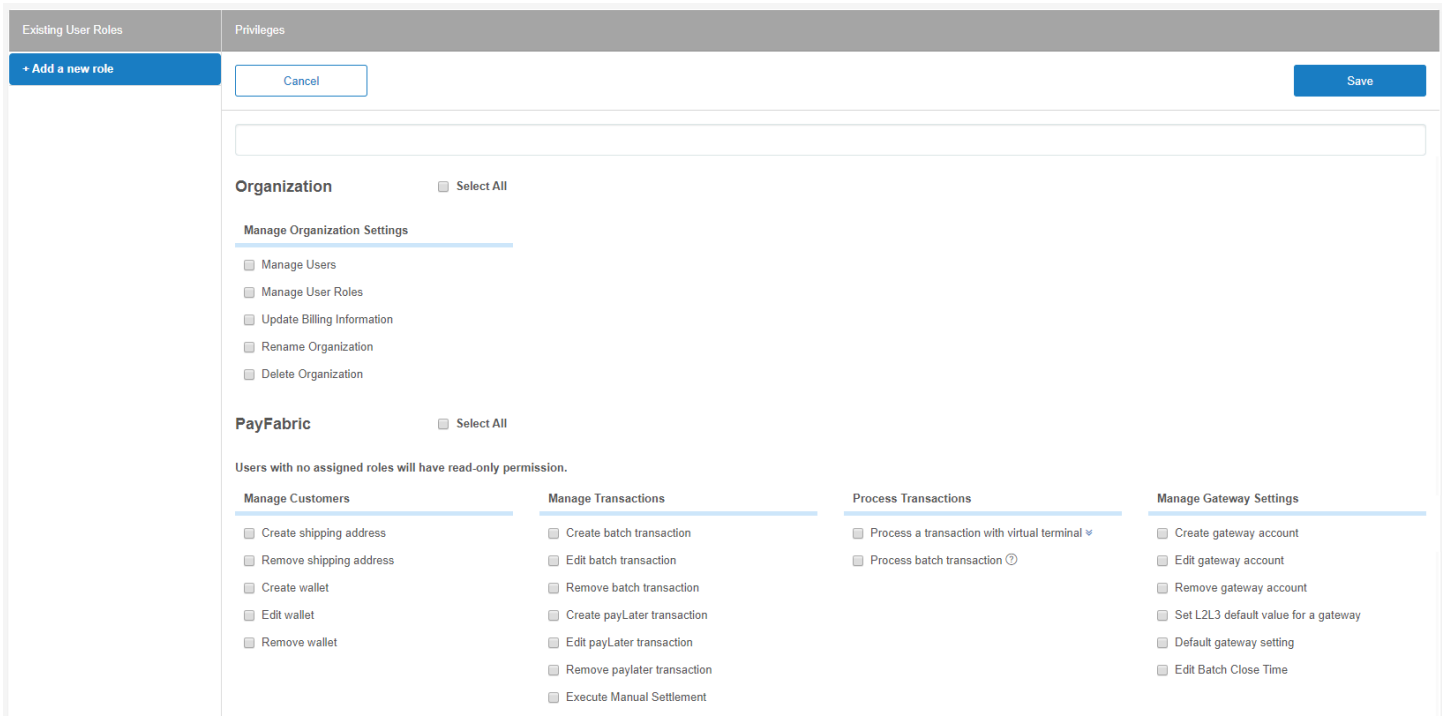


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User Roles

Provide merchant the ability to create user role that meets organization's needs. Each role can be configured with desired portal access and permissions for corresponding service(s).





Billing Information

Merchant can update or change their organization's billing information.

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15. User Profile

Manage user account profile information such as email, password and multi-factor authentication via mobile number via advanced security.

PayLink Service

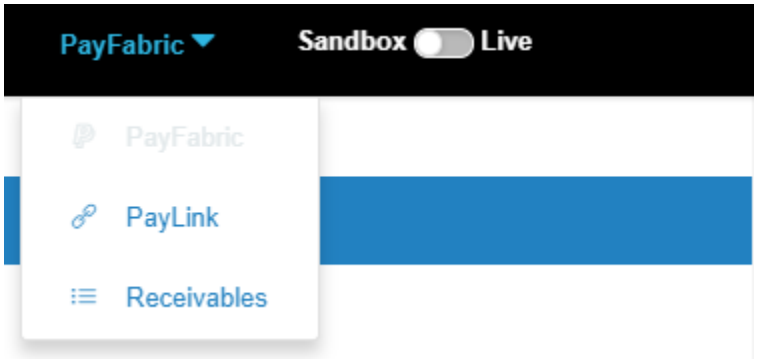
PayLink is an add-on service to PayFabric that provides businesses a fast, secure and convenient way to accept electronic payments via credit card or eCheck without PCI challenges. It provides a simple way to integrate electronic payment acceptance into any application.

PayLink puts the power of payment processing in your customer's hands. Easily send requests for payment to your customers using PayLink via email, SMS, or other communication methods. Your customers can use the link to remit payments and/or manage their private secure digital wallets (credit card or eCheck).

PayLink also include ERP and other connectors that allow seamless payment data integration with other systems.

Registration

To register for PayLink service, open the upper-left menu in the PayFabric portal and select the **PayLink** option in the menu.



The sign-up page will be displayed with information about PayLink including the pricing.

- **Access PayLink Live** – This will create a live production instance of PayLink for the organization. This button will only be active if the user is currently in a Live PayFabric Organization.

API

All interaction with the PayLink data is managed through the API. PayLink APIs are organized around Representational State Transfer (REST) architecture and are designed to have predictable, resource-oriented URLs and use HTTP response codes to indicate API errors.

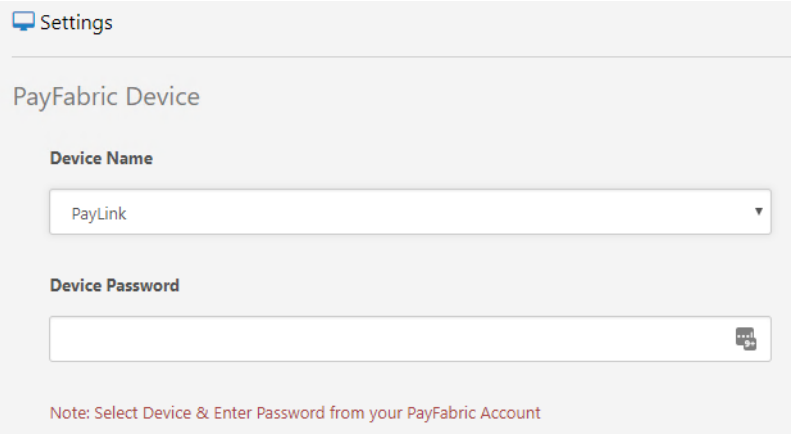
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Information on utilizing the API can be found on the PayLink GitHub page.
https://github.com/PayFabric/APIs/blob/master/PayLink/README.md

Settings

PayFabric Device

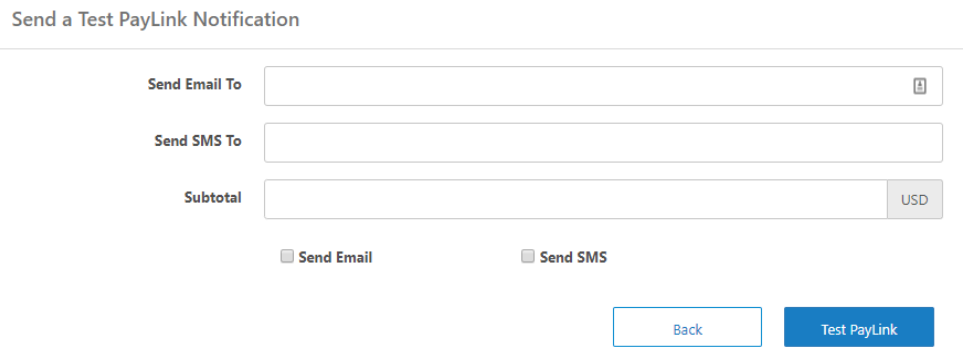
PayLink leverages the PayFabric's hosted page to process transaction and save digital wallet for future use.



User needs to set PayFabric Device to enable proper authentication for PayLink to consume PayFabric service in the background for transaction processing. The PayFabric Device will only list the devices available from PayFabric within the same organization as PayLink service.

Send a Test PayLink Notification

PayLink provides the ability to send test payment links. This enables merchant to test the notification templates, payment page theme, and to go through the experience of how a PayLink will work from end-customer's perspective. Please note these are for testing purposes only and WILL NOT process actual funds.

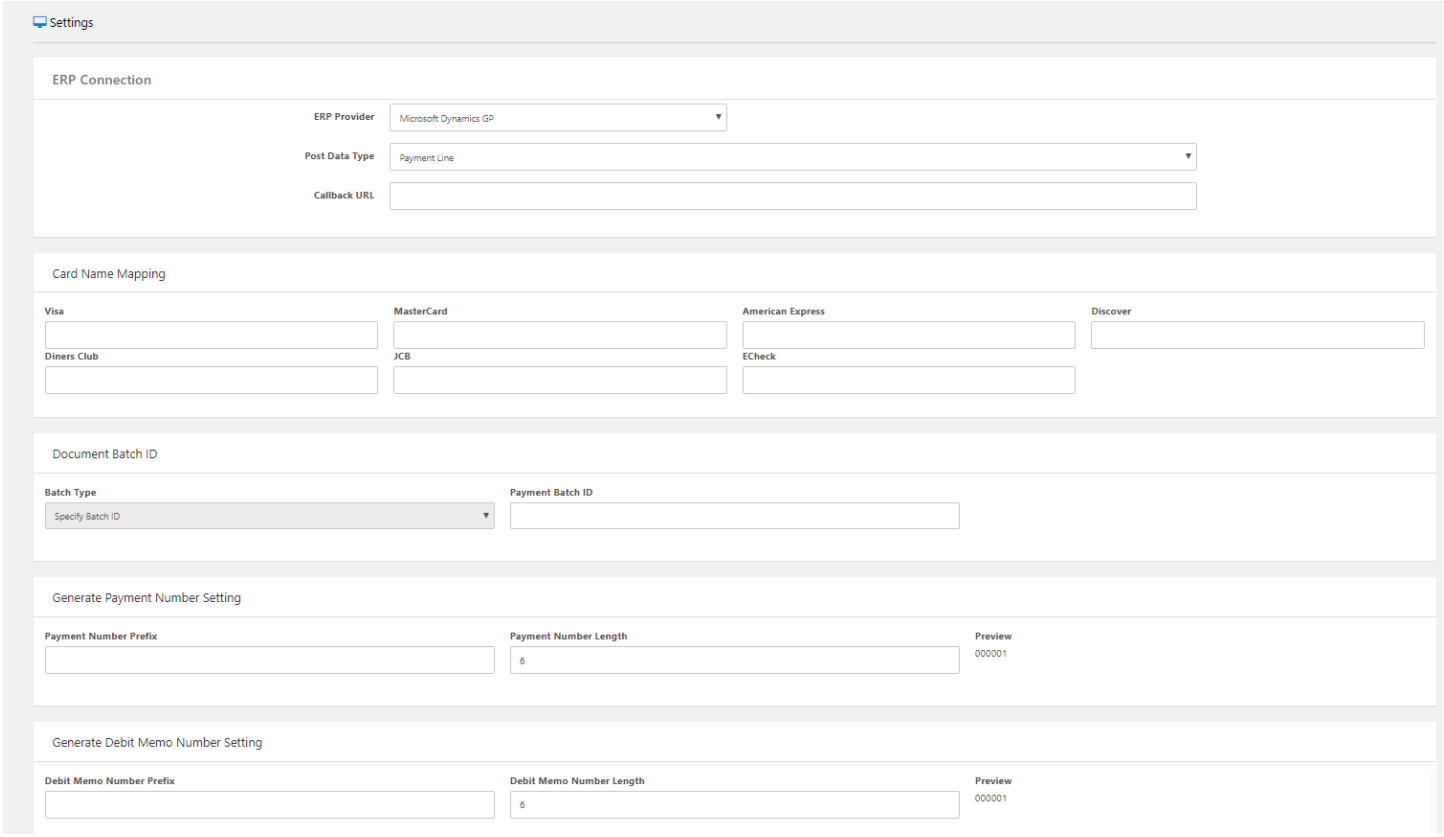


There is a limit on these tests, if you happen to reach this limit and require more, please contact our support team at support@payfabric.com.

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Configure ERP Connection

PayLink is able to send payment information back to Microsoft Dynamics GP, Microsoft Dynamics SL and Salespad after the payment is processed. This page allows user to configure connection details to other system(s) for payment integration.



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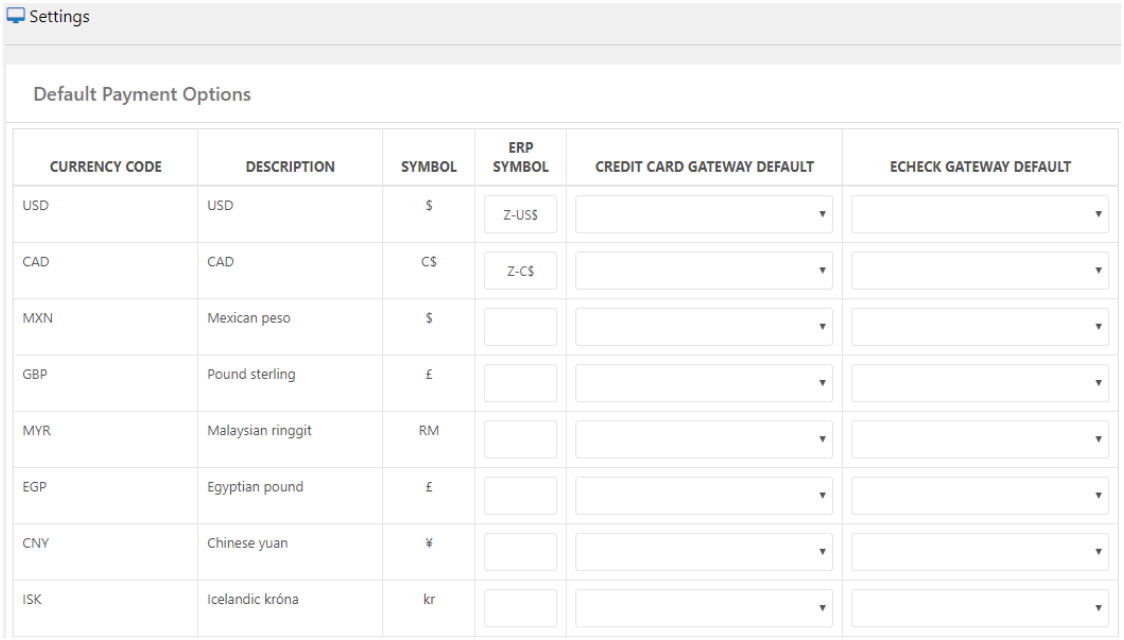
Field	Definition
ERP Connection	Setup connection for specific ERP.
Card Name Mapping	Setup mapping bewteen supported card type in PayLink and card name in selected ERP.
Document Batch ID	This option allow to specify Batch ID for post document.
Generate Payment Number Setting	When PayLink document's Post Data Type is Cash Receipt, specify the document prefix and the length of the PayLink's payment document with this setting. Note: This is only available for Microsoft Dynamics GP integration.
Generate Debit Memo Number Setting	When PayLink document contains Surcharge amount, a debit memo will be posted to Microsoft Dynamics GP with the amount. Note: this is only available for Microsoft Dynamics GP integration.

Configure Default Gateways

PayLink allows 3rd party application to send the API request without CreditCardGateway and ECheckGateway by using the default gateway profile settings.

Default credit card/eCheck gateway profile can be set against each currency type and the associated gateway information will be used during transaction processing.

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Settings

Default Payment Options

CURRENCY CODE	DESCRIPTION	SYMBOL	ERP SYMBOL	CREDIT CARD GATEWAY DEFAULT	ECHECK GATEWAY DEFAULT
USD	USD	$	Z-US$		
CAD	CAD	C$	Z-C$		
MXN	Mexican peso	$			
GBP	Pound sterling	£			
MYR	Malaysian ringgit	RM			
EGP	Egyptian pound	£			
CNY	Chinese yuan	¥			
ISK	Icelandic króna	kr			

Templates

The user is able to customize all of the notification templates that are distributed, either by email or SMS. Merchant is provided with a default set of templates which they can copy and make changes to, or start from scratch.

All of our templates have ability of inserting parameters. Parameters are active areas of the text that will be dynamically replaced by unique document information prior to the message being sent.

Each template may have different available parameters, merchant can click on the Insert Parameter link when creating or modifying the templates to see available parameters.

Overview

A quick overview of payment link information based on currency selection and date range, including:

Pending: Total count of pending payment links including the total amount.

Cancelled: Total count of cancelled payment links including the total amount.

Paid: Total count of paid payment links including the total amount.

Total: Total count of all [status] payment links including the total amount.

Revenues by Payment Method: Revenues breakdown based on the method of payment.

PayLink Counts by Payment Methods: Count breakdown based on the method of payment.

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PayLink Summary by Status: PayLink summary chart based on the payment link status.

Failed Integrated PayLinks: Provides the list of payment links that failed integration.

Send PayLink

User is able to enter details to send out a payment link request to end customer for payment (credit card or eCheck) remittance.

Field	Definition
Customer #	Specify the customer number or ID associated with the payment link.
Customer Name	Specify the customer name for the corresponding payment link.
Currency	Specify the currency type of the payment link.
Credit Card	Checkmark this option to enable end-customer to pay with credit card.
eCheck	Checkmark this option to enable end-customer to pay with eCheck or ACH.
Invoice Number	Specify invoice number corresponding to the payment link notification.
Add Message *(optional)*	Message to be included in the payment link notification to end customer.
Send Email To	Specify email address of the recipient of the payment link notification via email.
Send SMS To	Specify mobile phone number of the recipient of the payment link notification via SMS.
Subtotal	Specify the subtotal of the payment.

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Send Wallet Link

User is able to enter details to send out a wallet link request to end customer to collect digital wallet data (credit card or eCheck) in a secure manner.

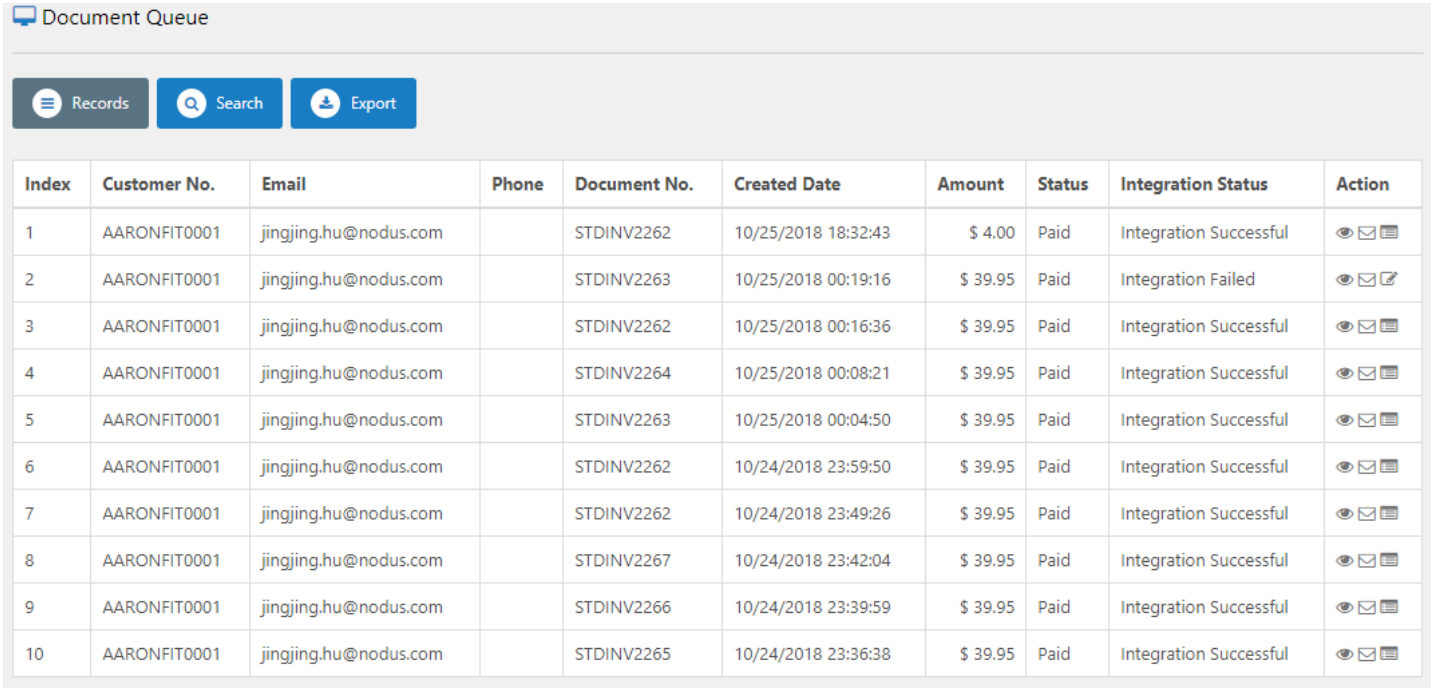
Field	Definition
Customer #	Specify the customer number or ID associated with the wallet link.
Customer Name	Specify the customer name for the corresponding wallet link.
Add Message *(optional)*	Message to be included in the wallet link notification to end customer.
Send Email To	Specify email address of the recipient of the wallet link notification via email.
Send SMS To	Specify mobile phone number of the recipient of the wallet link notification via SMS.

Document Queue

User is able to search all existing PayLinks from Document Queue and export the list, Furthermore, it allows user to perform various actions on your existing PayLinks, such as:

- Cancel Unpaid PayLinks
- Resend Notifications for PayLinks
- Resend Confirmation Receipts
- View Transaction Details
- View and Modify ERP Posting Payloads

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Document Queue

Records Search Export

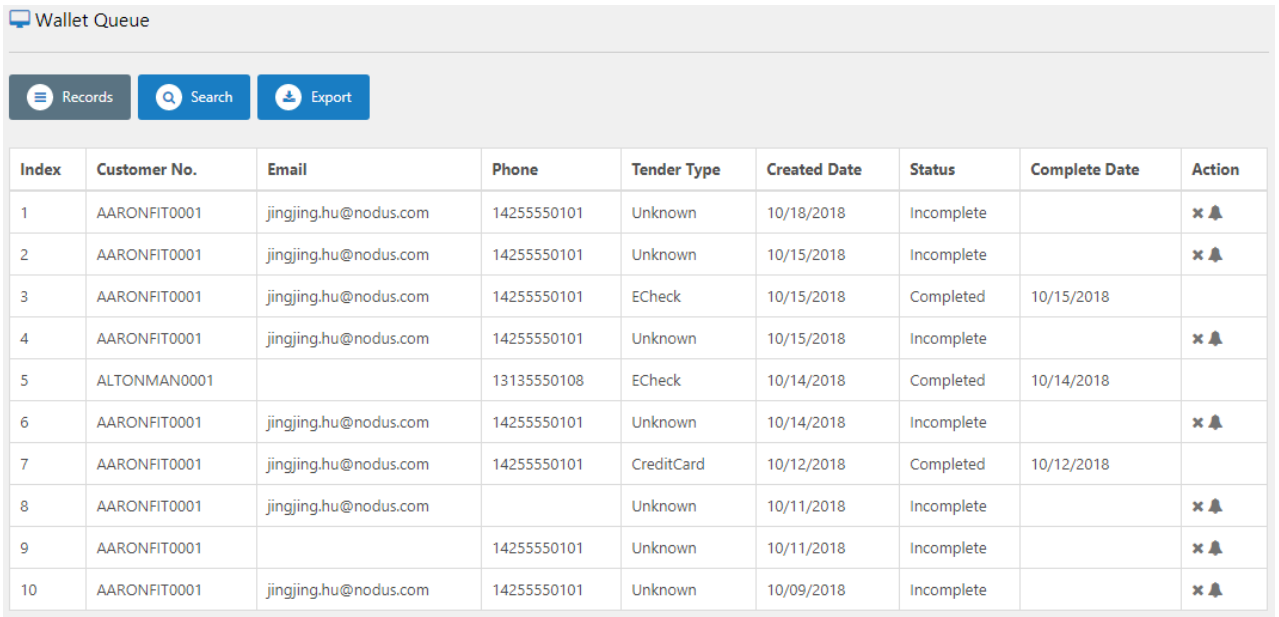
Index	Customer No.	Email	Phone	Document No.	Created Date	Amount	Status	Integration Status	Action
1	AARONFIT0001	jingjing.hu@nodus.com		STDINV2262	10/25/2018 18:32:43	$ 4.00	Paid	Integration Successful	
2	AARONFIT0001	jingjing.hu@nodus.com		STDINV2263	10/25/2018 00:19:16	$ 39.95	Paid	Integration Failed	
3	AARONFIT0001	jingjing.hu@nodus.com		STDINV2262	10/25/2018 00:16:36	$ 39.95	Paid	Integration Successful	
4	AARONFIT0001	jingjing.hu@nodus.com		STDINV2264	10/25/2018 00:08:21	$ 39.95	Paid	Integration Successful	
5	AARONFIT0001	jingjing.hu@nodus.com		STDINV2263	10/25/2018 00:04:50	$ 39.95	Paid	Integration Successful	
6	AARONFIT0001	jingjing.hu@nodus.com		STDINV2262	10/24/2018 23:59:50	$ 39.95	Paid	Integration Successful	
7	AARONFIT0001	jingjing.hu@nodus.com		STDINV2262	10/24/2018 23:49:26	$ 39.95	Paid	Integration Successful	
8	AARONFIT0001	jingjing.hu@nodus.com		STDINV2267	10/24/2018 23:42:04	$ 39.95	Paid	Integration Successful	
9	AARONFIT0001	jingjing.hu@nodus.com		STDINV2266	10/24/2018 23:39:59	$ 39.95	Paid	Integration Successful	
10	AARONFIT0001	jingjing.hu@nodus.com		STDINV2265	10/24/2018 23:36:38	$ 39.95	Paid	Integration Successful	

Note: Cancelled PayLinks are not displayed by default, you need to mark **Include Cancelled Document** under **Search** Tab to display them.

Wallet Queue

User is able to search out all existing WalletLinks from Wallet Queue and export the list. Furthermore, it allows user to perform various actions against existing WalletLinks, such as:

- Cancel Incomplete WalletLinks
- Resend Notifications for WalletLinks


Wallet Queue

Records Search Export

Index	Customer No.	Email	Phone	Tender Type	Created Date	Status	Complete Date	Action
1	AARONFIT0001	jingjing.hu@nodus.com	14255550101	Unknown	10/18/2018	Incomplete		
2	AARONFIT0001	jingjing.hu@nodus.com	14255550101	Unknown	10/15/2018	Incomplete		
3	AARONFIT0001	jingjing.hu@nodus.com	14255550101	ECheck	10/15/2018	Completed	10/15/2018	
4	AARONFIT0001	jingjing.hu@nodus.com	14255550101	Unknown	10/15/2018	Incomplete		
5	ALTONMAN0001		13135550108	ECheck	10/14/2018	Completed	10/14/2018	
6	AARONFIT0001	jingjing.hu@nodus.com	14255550101	Unknown	10/14/2018	Incomplete		
7	AARONFIT0001	jingjing.hu@nodus.com	14255550101	CreditCard	10/12/2018	Completed	10/12/2018	
8	AARONFIT0001	jingjing.hu@nodus.com		Unknown	10/11/2018	Incomplete		
9	AARONFIT0001		14255550101	Unknown	10/11/2018	Incomplete		
10	AARONFIT0001	jingjing.hu@nodus.com	14255550101	Unknown	10/09/2018	Incomplete		

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Note: Cancelled Wallet Links are not displayed by default, user needs to mark **Include Cancelled Document** under **Search** Tab to display them.

Appendix A – Gateway Configuration

PayPal PayFlowPro Gateway Configuration

Configure the Gateway Account Profile using the following information. Fields not mentioned here are not required for the minimum configuration.

Field	Value
Connector	PayFlowPro
Processor	Choose the Credit Card Processor that the PayPal PayFlowPro account is connected to
Card Class	Choose 'Credit' for Credit Card Transactions Choose 'Check' for eCheck Transactions
Server.Address	For Test Transactions: https://pilot-payflowpro.paypal.com For Live Transactions: https://payflowpro.paypal.com
Partner	This is the partner that setup the PayFlowPro account. This is the same as the 'Partner' field used to log into https://manager.paypal.com
Vendor	This is the '**Merchant Login**' used to identify the PayFlowPro account. This is the same as the 'Merchant Login' used to log into https://manager.paypal.com
UserID	The PayFlowPro account may utilize a User when logging into https://manager.paypal.com. If no 'User' is used when logging into the PayPal Manager, fill in this field with the same value as the '**Vendor**' field.
Password	This is the password associated with the 'User' or 'Merchant Login' to log into https://manager.paypal.com.
UseToken	If using the **Tokenization Option**, set this field to 'True'. Otherwise, leave it as false.

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USAePaySOAP Gateway Configuration

This is the newer version of the USAePay gateway integration. Configure the Gateway Account Profile using the following information. Fields not mentioned here are not required for the minimum configuration.

Field	Value
Connector	USAePaySOAP
Processor	USAePay
Card Class	Choose 'Credit' for Credit Card Transactions
	Choose 'ECheck' for eCheck Transactions
Server.Address	For Test Transactions: https://sandbox.usaepay.com/soap/gate
	For Live Transactions: https://secure.usaepay.com/soap/gate
Server.Port	443

Authorize.Net Gateway Configuration

Configure the Gateway Account Profile using the following information. Fields not mentioned here are not required for the minimum configuration.

Field	Value
Connector	Authorize.Net
Processor	Authorize.Net
Card Class	Choose 'Credit' for Credit Card Transactions Choose 'eCheck' for eCheck Transactions
Server.Address	For Test Transactions: https://secure.authorize.net/gateway/transact.dll For Live Transactions: https://test.authorize.net/gateway/transact.dll
Port	443
LoginID	This is the login id used for the Authorize.net account
TransactionKey	This key can be obtained from the Authorize.Net Gateway. Contact the Authorize.net gateway provider for more details.

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TestMode	For a test transactions, set this value to '**True**' For a live transactions, set this value to '**False**'
UseToken	If using the **Tokenization Option**, set this field to 'True'. Otherwise, leave it as false.

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CyberSource Gateway Configuration

Configure the Gateway Account Profile using the following information. Fields not mentioned here are not required for the minimum configuration.

Field	Value
Connector	Cybersource
Processor	Choose the Credit Card Processor that the Cybersource account is connected to
Card Class	Credit
Server.Address	For Test Transactions: ics2test.ic3.com For Live Transactions: Ics2.ic3.com
MerchantID	This is the merchant ID for the Cybersource account

To use the Cybersource Gateway, it is necessary to obtain the secure CyberSource Keys from the Cybersource eCert Application. Contact the CyberSource partner for more information on obtaining these keys.

CyberSourceSOAP Gateway Configuration

This is a newer version of the Cybersource Gateway integration. Configure the Gateway Account Profile using the following information. Fields not mentioned here are not required for the minimum configuration.

Field	Value
Connector	CybersourceSOAP
Processor	Choose the Processor that the Cybersource account is connected to
Card Class	Choose 'Credit' for Credit Card Transactions
	Choose 'ECheck' for eCheck Transactions
Server.Address	For Test Transactions: https://ics2wstesta.ic3.com/commerce/1.x/transactionProcessor
	For Live Transactions: https://ics2wsa.ic3.com/commerce/1.x/transactionProcessor/
MerchantID	This is the merchant ID for the Cybersource account
Transaction Key	Generated from CyberSource Business Center > Account Management > Transaction Security Keys > Security Keys for the SOAP Toolkit API

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CurrencyCode	Transaction currency, e.g. 'USD'

Paymentech Orbital Gateway Configuration

Configure the Gateway Account Profile using the following information. Fields not mentioned here are not required for the minimum configuration.

Field	Value
Connector	Paymentech
Processor	Paymentech
Card Class	Choose 'Credit' for Credit Card Transactions Choose 'Check' for eCheck Transactions
Server.Address	For Test Transactions: Orbitalvar1.chasepaymentech.net For Live Transactions: Orbital1.chasepaymentech.net
Port	443
MerchantID	This is the Merchant identifier used for the Paymentech Account
BIN	This is the typically 6 digit bin number associated with the Paymentech Account
TerminalID	This is the identifier for the Terminal ID used with the Paymentech Account
UseToken	If using the **Tokenization Option**, set this field to 'True'. Otherwise, leave it as false.

When using the Paymentech Gateway it is important to make sure that the Web Server's external IP has been registered with Paymentech for the specified account before processing transactions.

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Moneris Gateway Configuration

Configure the Gateway Account Profile using the following information. Fields not mentioned here are not required for the minimum configuration.

Field	Value
Connector	Moneris
Processor	Moneris
Card Class	Credit
Server.Address	For Test Transactions: https://esqa.moneris.com:43924/gateway2/servlet/MpgRequest For Live Transactions: https://www3.moneris.com:43924/gateway2/servlet/MpgRequest
Server.Port	43924
StoreID	This is the Store identifier obtained from Moneris
APIToken	This is the API Token value obtained from Moneris

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Forte Gateway Configuration

Field	Value
Connector	Forte
Processor	Forte
Card Class	ECheck
Server.Address	For Test Transactions: https://sandbox.forte.net/api/v3
	For Live Transactions: must contact Forte Technical Support at go Live.
OrganizationID	This is the organization identifier obtained from Forte
LocationID	This is the location identifier obtained from Forte
APIAccessID	This is the API access identifier obtained from Forte
APISecureKey	This is the API secure key obtained from Forte

EVO Gateway Configuration

Field	Value
Connector	EVO
Processor	Evo US
Card Class	Credit
MerchantProfile	This is the Merchant ID for the API service obtained from EVO

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Field	Value
ServiceId	This is the Service ID for the API service obtained from EVO

NMI Gateway Configuration

Field	Value
Connector	NMIPayment
Processor	NMI Payment
Card Class	Credit
Server.Url	For Test Transactions: https://secure.networkmerchants.com/api/transact.php
	For Live Transactions: https://secure.networkmerchants.com/api/transact.php
UserName	This is the username obtained from NMI Payment account provider.
Password	This is the password obtained from NMI Payment account provider.
Security Key	This is the Digital Key for the API service obtained from NMI Payment account.

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