



Release Notes

EVO Dashboard, Controlled Release Version

EVO Dashboard

EVO Dashboard was designed based on merchant feedback and technical evaluations of existing EVO products. It was determined through these reviews that there was a great benefit for merchants to be able to conduct reporting and transaction management within the same system that contains the payment acceptance workflow. Thus, Dashboard was created to consolidate the Virtual Terminal and the reporting and transaction capabilities into a single, fast, scalable, and easy to use product for both mobile and web-based users.

Regions

- * United States (VT Lite users only)

New Features

- * **Card not Present Credit Card Transactions**
 - o Ability to create a onetime order
 - o Ability to create order with itemized list
 - o Ability to add both Bill to and Ship to Addresses
 - o Ability to issue refunds
 - o Ability to issue partial refunds
 - o Ability to email and resend receipts
- * **One Time Invoicing**
 - o Ability to create Invoices with itemized list, including shipping fee and tax
 - o Ability to print Invoice to PDF with active Pay link Button
 - o Ability to create payment link to use in body of Email (Cut and paste)
 - o Ability to create payment button to user in body of Email (Cut and paste)
- * **Customer Management**
 - o Ability to create and edit individual customer records
 - o Password and Security Settings Management (setting up and resetting)
 - o New platform "Customer" feature that acts as a container for merchant customer's information making it easier to conduct reporting and manage additional activities.
- * **View and Manage Features**
 - o Ability to view records of all Transactions
 - o Ability to view records of all Invoices
 - o Ability to view records of all Customers
- * **Business Intelligence**

- Ability to view Charting and Graphing of transactions by last seven days.
- Ability to view and compare credit card usage by card
 - Ability to view and track overall sales
- * **Mobile Optimization**
 - Users viewing Dashboard on a mobile device have an experience optimized for their device

Contact Us

For questions regarding the information contained within this document, please visit the EVO Snap* Support site at <http://www.evosnap.com/support/> or contact the EVO Snap* Solutions Engineering team toll free at 1.844.386.7627 x 3 or by email support@evosnap.com.