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# **User Guide** Dashboard, Controlled Release Version



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# **EVO Dashboard Overview**

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 mobile or web-based users.

**Note**: Dashboard functionality is permissions based – certain features may or may not be visible based on the user's permission settings.

# **First Time Login**

## Setting a Password

Upon logging into Dashboard for the first time, the first page a merchant will encounter is the Change Password page (Figure 1). Here, the merchant will enter their current, temporary password, as well as what they would like their new password to be. This new password must have at least 7 characters, an uppercase letter, a lowercase letter, a number, and a special character. Required fields turn red when left blank, and the "Save" button will turn blue when enabled. A success message appears upon a successful password change, and an email informing the merchant of the password change is sent to the email address that the merchant registered with (Figure 2).



Fig.1 (left) and Fig. 2 (right) - the Change Password page and the email sent to merchants upon a successful password change.

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## **Updating Security Questions**

Next, the merchant will set the security questions for their account in case of a lost or forgotten password (Figure 3). The current password must be entered correctly for security questions to be successfully set. The merchant must choose three different security questions from a list of security question options – please note that these questions **cannot be changed**, so merchants should choose their security questions carefully. Once the security questions are successfully updated, the merchant will be brought to the Dashboard homepage and an email informing the merchant of the security question update is sent to the email address that the merchant registered with (Figure 4).

*Fig. 3 (right)* – the Set Security Questions page. Merchants must select three security questions they will use in order to retrieve a lost or forgotten password. Note, these questions *cannot be changed* after being set here. Answers can be changed in the merchant profile.



#### YOUR ACCOUNT HAS BEEN UPDATED!

Dear newUser, Your account has been successfully updated. NO FURTHER ACTION IS REQUIRED.

If you did not update your profile, or otherwise need assistance, please contact support@evosnap.com

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© EVO Snap\* & EVO Payments International <u>Visit EVO Snap\*</u> **Fig. 4 (left)** – the email message a merchant receives upon successful update of security question answers.

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# Homepage



Merchants can navigate to http://dashboard.evopayments.com to access the Dashboard login page (Figure 5).

Fig. 5 (left) - the Dashboard login page.

After logging in with their user name and password, merchants will be brought to the Dashboard homepage (Figure 6).

Many features can be accessed through the menus and buttons on this page, such as the basic features of taking a payment, creating an invoice, and adding a customer. Most notably, the homepage features two graphs displaying the daily transaction count and the transaction summary by card brand for the past week, as well as a detailed, clickable list of the most recent transactions (Figure 6). Clicking on the EVO Payments International logo in the top, left corner will return the user to the homepage from any page in Dashboard.



*Fig. 6 (left)* – the Dashboard homepage. Note that if the cursor hovers over a bar on either graph, a pop-up with more details about that specific heading appears; that feature can be seen here, demonstrated in the Transaction Summary by Card Brand graph.

Also, note that the date range for each graph can be found at the top, right corner in each graph's field.

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# **Transactions**

## Take a Payment

Clicking on the blue "Take a Payment" button on the Dashboard homepage brings up the quickpayment page. Fields marked with an asterisk must be filled in and will return red if clicked on and left blank, as can be seen in Figure 7. The "Process" button will turn blue when the fields are filled out properly, indicating that the user is ready to proceed with the payment. Upon a successful payment, a success message is returned with an option to take another quick charge payment (Figure 8).

PAYMENTS TRANSACTIONS INVOICES CUSTOMERS				ADMIN ▼ SETTINGS ▼
CREATE INVOICE				
Amount * \$10.00				
Cardholder Name *		Billing Postal Code		
Card Number *				8
Month *	▼ Year *		- CVV	
		E PROCESS		
Version 1.0.0-20180323.1.0 (29)		ments International. EVO is a registered ISO and MSP of Deutsche Bank		

*Fig.* **7** – the Take a Payment page. Note that required fields return red when left blank. Also note that since the user is on the Take a Payment page, that button no longer appears as a navigation option

PAYMENTS TRANSACTIONS INVOICES CUSTOMED	5	ADMIN + SETTINGS +	1
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	Your payment of \$10.00 has been processed.		
	Click Take A Payment to process another payment.		- m
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*Fig. 8 (left)* – The success message returned after a successful quick charge payment.

If the payment is partially approved or declined, an error message is returned. If the payment is partially approved, Dashboard will subsequently void the transaction.

# **Recent Transactions Page**

Clicking on the "Transactions" heading at the top of every page brings the user to the Recent Transactions page (Figure 9). Only the transactions from the most recent 180 days will be shown in the list via infinite scrolling, but a merchant can search for a specific transaction through a particular date range, card type, invoice number, approval code, or transaction status. Clicking on a transaction from the list or search results brings up a Payment Details page for that transaction.

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PAYMENTS TRANSACTIO	ONS INVOICES CUSTOMERS							ADMIN + SETTINGS	·
Recent transactions (all Search for transactions or select a									
TAKE A PAYMENT		ARD CUSTOMER		8	Select a date range 03/20/2018 - 03/27/2018			٩	
DATE/TIME	INVOICE NUMBER	APPROVAL CODE	AMOUNT	TYPE	LAST 4	CARD TYPE	STATUS		
03/27/2018 1:29 PM	180327011743-ald		\$7.93	VOID	1111	VISA	Undone		
03/27/2018 1:29 PM	180327011743-ald		\$7.93	AUTH	1111	WISA	ErrorUnknown		
03/27/2018 1:27 PM	180327011743-ald		57.93	VOID	1111	WISA	Undone		
03/27/2018 1:27 PM	180327011743-ald		\$7.93	AUTH	1111	1054	ErrorUnknown		
03/27/2018 12:56 PM	qa-180327125551		\$1.59	VOID	9130		Undone		
03/27/2018 12:56 PM	qa-180327125551	SDNISY	\$1.59	AUTH	9130		Captured		
03/27/2018 12:56 PM	qa-180327125540	JCJRYT	\$2,203.00	AUTH	2874	D	Captured		
03/27/2018 12:55 PM			\$176.99	VOID	5964	.KB	ReturnUndone		
03/27/2018 12:55 PM			\$176.99	RETURN	5964		Returned		
03/27/2018 12:55 PM		2.QZI2D	\$176.99	AUTH	5964	100	Captured		
03/27/2018 12:55 PM			\$824.99	RETURN	9475		Returned		
03/27/2018 12:55 PM		99U3JP	\$824.99	AUTH	9475		Captured		
03/27/2018 12:55 PM		XVEVMN	\$61.99	AUTH	8041	1054	Captured		
03/27/2018 12:54 PM			\$1.00	VOID	3410	10153	ReturnUndone		

Fig. 9 (left) – the Recent Transactions page. Each transaction in the list is shown with the date and time it was processed, the amount of the transaction, the transaction type, last four digits of the card used, the card type, the current transaction status, and, if applicable, the invoice number and approval code.

## **Payment Details Page**

Completing the processing of a transaction or clicking on a particular transaction on either the Dashboard homepage or in the list of transactions on the Recent Transactions page brings up the Payment Details page for that transaction. The buttons at the top of the page represent the actions available for the transaction, as seen in Figure 10.

**Note**: Transactions can only be voided on the same day they were processed (until midnight in the user's time zone). If that time has passed, the "Void" option will not appear.

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03/27/2018 12:55 PM		\$824.99	AUTH	9475			-	Captured	
03/27/2018 12:55 PM 03/27/2018 12:55 PM		\$824.99 \$824.99	AUTH	9475 947				Captured	

*Fig.* 10 – the Payment Details page. The Transaction Family section shows the transaction history and details for each transaction. The two available actions for this transaction are "Email Receipt" and "Process Void". Transactions in the "Transaction Family" section can be clicked on for more details about each step in the transaction's history.



When a user clicks on one of the available transaction options, a pop-up appears asking them to confirm the action they've requested (Figures 11, 12, 13, and 14).

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Fig. 11 (left) and Fig. 12 (right) – the "Cancel Invoice" and "Confirm Refund" pop-ups. Note that a partial refund can be issued by entering an amount less than the available refund amount listed.



Fig. 13 - "Process Void" confirmation. Note that voids can only be processed on the same day the transaction was processed.

	_
Confirm Email	
Confirm that you would like to send a receipt to	
★ CANCEL ✓ EMAIL RECEIPT	

Fig. 14 - "Confirm Email" pop-up. Merchants can enter a specific email address that they wish to send a receipt to here.

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# Invoices

# **Create an Invoice**

Clicking on the blue "Create Invoice" button starts the process of creating an invoice for a new or existing customer. The first page the user is brought to is the Select Customer page (Figure 15). You can search for a specific customer using their email address, phone number, customer ID, or billing postal code; if the invoice is being created for a new customer, simply click on the heading "2: Create/Review Customer" or the "Create Customer" button.

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**Fig. 15 (left)** – the Create Invoice Customer Selection page. Use the search bar to search for a specific customer. If a new customer needs to be created, click on the "2: Create/Review Customer" heading.

Details from the customer selected in the previous page appear in the fields on the Create/Review Customer page (Figure 16). Merchants are able to edit the customer's information for which the invoice is being created but only after selecting the blue "Edit" button at the top of the page. General information (such as name, email address, phone number, and customer ID), billing address, shipping address, and optional information (such as gender, marital status, and birthdate) can all be edited in this section, and the changes will be mirrored in the customer's profile in Dashboard. Customers must have the required information (first name, last name, and email address) before continuing with creating an invoice for that customer. When the merchant is ready to continue, they can either click the "Add Items" button at the bottom right corner of the page or the "3: Add Items" heading.

 Fig. 16 (right) – the Create/Review

 Customer page. The fields can be

 collapsed and opened by clicking on the

 arrow on the right side of the section. If a

 customer was selected from the previous

 page, the sections will be filled with that

 customer's information; if a customer was

 not selected, the fields for general

 information, billing address, and shipping

 address will need to be entered before

 continuing the process of creating an

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	Optional Information		~

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After reviewing the customer's information, the merchant can add items to the invoice either from the catalog or create a new item. Fields marked with an asterisk are required and will turn red if opened and left blank, as seen in Figure 17.

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Fig. 17 – the Add Items page for invoices. Note that fields that are required turn red if left blank. The tax rate is applied as a percentage to two decimal places. Also note that if "Items" is left blank, "Shipping" rate becomes a required field. Also, the "Quantity" field can only be populated with an integer value and decimals render this field invalid.

If the merchant is adding an item from the catalog, the Code/SKU and Description fields have a "type-ahead" feature that will pull up existing catalog items with the same character or characters entered into the field (Figure 18). Once the user finds the code/SKU or description of the item they wish to add to the invoice, clicking on it will auto-populate all other fields with saved information from the catalog item.

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no.50 - #0#7803205-bank #0#79803005-bank e2e-90240241-bank e2e-90240245-bank		Elipik mise* sector Elipis	Ten Hills Hen State 5035	▲ (2) (2) (2) (2) (2) (2) (2) (2) (2) (2)	eccentres \$955208118448 Addrone78065	5000 5000 5000 5000 5000 5000	
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showing the Catalog type-ahead feature. The top image shows the list of catalog items that contain the entered character and the bottom shows the auto-populated fields once an item is selected.

Fig. 18 (right) - the Add Items page for invoices

If the pre-populated Code/SKU, Unit Price, Tax Rate, or Description is entered, the "Add to Catalog" button becomes enabled, allowing the user to quickly add the item to the catalog (Figure 19) to be used again in future created invoices. Likewise, if values are input which don't match any stored catalog item's code/SKU or Description, the "Add to Catalog" button will become enabled when the minimum required information code/SKU, unit price, and Description are provided.

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TAKE A PAYMENT					
Select Customer			🕑 Create/Review Cu:	stomer	
Code/GRU *			Unit Price *	Tox Flate	
e2e-278763836- tuna	19/20	Quantity * Quantity is required.	\$ 10.63	9.54	
Description *					
	.) specimen o	of tuna was 21 feet long, weigh	ing 1600 pounds!		84
		Sub Total	Tax Total	item Total	0.4
			\$0.00	\$0.00	
		\$0.00	30.00		

*Fig. 19 (right)* - the Add Items page for invoices showing the "Add to Catalog" button enabled because the description changed.

Please note that the "Quantity" field will only accept whole number values – decimal values are invalid. Once the fields are populated, the merchant can click on "Review Invoice" and also "4: Review Invoice" to preview the invoice.

On the Review Invoice page (Figure 20), the merchant can review all the information entered in the invoice creation process. When the merchant has completed their review, they can click on the blue "Create Invoice" button to create the invoice and automatically be navigated to the Review Invoice page.

*Fig. 20 (right)* – the Review Invoice page. Merchants can review the customer information, as well as the invoice item details for the invoice. Additional notes will appear in the "Additional Notes" section if added on the previous page – if no notes are added, the "Additional Notes" section will not appear.

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## **Recent Invoices**

Clicking on the "Invoices" heading next to the EVO Payments logo brings the user to the Recent Invoices page (Figure 21), which has a clickable list of invoices. Details about recent invoices, including date created, invoice number, customer name, invoice amount, payment type, and invoice status are included for each invoice in the list. If the specific invoice a merchant is looking for is not in the recent invoices list, merchants can search for a specific invoice using a date range, invoice number, or invoice status for invoices created up to one year ago.



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ecent invoices					
arch for invoices or select an in	ivoice to view details.				
TAKE A PAYMENT	CREATE INVOICE	ADD CUSTOMER	Select a date range 01/04/2018 - 0		0
EATED DATE	INVOICE NUMBER	CUSTOMER	INVOICE AMOUNT	PAYMENT TYPE	INVOICE STATUS
/01/2018 2:52 PM	180201025048-44w	Whitney McClure	\$10.59	Credit Card	Pending
/01/2018 2:50 PM	180201024654-ook	Whitney McClure	\$1,563.46	Credit Card	Pending
2/01/2018 2:46 PM	180201024348-zbx	Althea Pfannerstill	\$81.65	Credit Card	Pending
2/01/2018 2:35 PM	180201023415-1cd	Melvina Jones	\$20.97	Credit Card	Pending
2/01/2018 2:23 PM	180201022337-em9	Austyn Wintheiser	\$8.50	Credit Card	Cancelled
2/01/2018 12:39 PM	180201123817-vzo	Han Solo	\$5.00	Credit Card	Pending
2/01/2018 12:27 PM	180201122719-8jd	Han Solo	\$5.00	Credit Card	Pending
2/01/2018 12:16 PM	180201121549-ort	Han Solo	\$5.00	Credit Card	Pending
2/01/2018 12:08 PM	180201120807-z8l	Han Solo	\$5.00	Credit Card	Pending
12/01/2018 12:07 PM	180201120703-iu6	Han Solo	\$5.00	Credit Card	Cancelled
2/01/2018 10:28 AM	180201102645-nbv	Antonette Grimes	\$10.59	Credit Card	Pending
2/01/2018 10:26 AM	180201102213-6tz	Antonette Grimes	\$2,585.99	Credit Card	Pending
2/01/2018 10:21 AM	180201101859-mkx	Gussie Boyle	\$463.97	Credit Card	Pending
2/01/2018 10:10 AM	180201100905-x6d	Makenna Hammes	\$3,633.68	Credit Card	Pending

*Fig.* 21 – the Recent Invoices page. Merchants can click on a recent invoice from the list or can search for a specific invoice using the search function.

## **Review Invoice Page**

Clicking on an invoice from the list brings up the page to review the invoice; in the top, right corner of the invoice, the invoice status will be shown and will appear in red if cancelled, green if paid, and yellow if pending. Depending on the status of the invoice, different actions for the invoice will appear at the top of the page. For example, the invoice in Figure 22 is pending payment (shown by the yellow "Pending" in the top, right corner), so there are options available to cancel the invoice, copy a link to the invoice, download the invoice, pay the invoice now, or re-create the invoice. However, the invoice in Figure 23 has been cancelled, and the invoice in Figure 24 has been paid; therefore, the only actions available for those invoices are "Download" and "Re-create".

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				Grand To		865.50		
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*Fig.* 22 – the top of the page to review a specific invoice. Note that this invoice matches the invoice that was created using the Create an Invoice workflow. The four buttons at the top of the page correspond to the actions available for that invoice.

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Fig. 23 (left) and Fig. 24 (right) – Cancelled and Paid invoices. Note that the only actions available for these invoices are "Download"
and "Re-create".

No matter the status of the invoice, each invoice will have a "Related Transactions" section at the bottom of the page (Figure 25). The transactions listed there are associated with that particular invoice; however, only "Captured" state transactions are visible at this time. For further information, the user must select the "Captured" transaction state from the list to be navigated to the Payment Details page. Also, if the transaction was declined, the transaction will not be included in the list.

INVOICE NUMBER	APPROVAL CODE	AMOUNT	TYPE	LAST 4	CARD TYPE	STATUS	
180306111738-llf	MAAH4U	\$22.00	AUTH	1111	VISA	Captured	

**Fig. 25** – Related Transactions section for an invoice. This section shows the associated "Captured" transactions for a particular invoice. Note that any other transaction statuses will not appear in the list – for further transaction details, users must navigate to the Payment Details page by clicking on the captured transaction in the list.

As mentioned before, there are five actions that can be taken with an invoice that is pending payment:

#### Cancel



Selecting the "Cancel" option brings up the pop-up seen in Figure 26. Clicking "Yes" responds with a success message confirming the invoice was cancelled, and the invoice will update its status to "Cancelled" as well. A date stamp is added to the invoice to reflect the date the invoice was cancelled.

Fig. 26 (left) – Cancel Invoice button pop-up.





#### Fig. 28 (right) - a downloaded pending invoice. The red boxes show the "Pay Now"

clicked (Figure 28).

button and the payment web address link that can be copied and pasted into a web browser which both redirect to the Invoice Payment page.

Selecting the "Download" option downloads a copy of the

invoice in its current state. This is the only option available for all three invoice statuses. A pending invoice that is downloaded

button that both redirect to the Invoice Payment page when

#### **Pay Now**

Selecting the "Pay Now" option brings up a page identical to the invoice payment page from Figure 19, with a copy of the invoice to the left and the payment application embedded on the page to

the right. Again, all the fields on the invoice payment page are editable except for the amount, and fields marked with asterisks are required. Once the payment is processed, the invoice status will update to "Paid" and a time-stamp will appear on the invoice with the date it was paid (Figure 29).

*Fig. 29 (right)* – a closer look at the "Date Paid" time stamp on a paid invoice.

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#### **Copy Link**

**Download** 

Selecting the "Copy Link" option copies the link to the invoice so that a merchant can paste that link to make it accessible to the customer. Following that link brings the customer to the invoice payment page (Figure 27). All the fields on the invoice payment page are editable except for the amount, and fields marked with an asterisk are required.

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		Grand Total		\$716.88	











#### **Re-create**

Clicking on the "Re-create" button brings the user to the Review Invoice page from the invoice creation workflow. The re-created invoice has the same information as the original invoice, including the same customer and customer information, billing address, shipping address, items, and notes; however, this information can be edited by going back to prior steps in the invoice creation process. This action allows for merchants to quickly and easily recreate previous invoices.

# Customers

## Add a Customer

Clicking on the blue "Add Customer" button brings the user to a page where they can create new customers. The fields that are marked with asterisks are required and will turn red if clicked on and not filled in (Figure 30). If the billing and shipping addresses are the same, users can click on the "Copy Billing Address" button to auto-fill in the information from the billing address section to the shipping address section. Once finished creating the customer, clicking on the blue "Create" button finishes the customer creation process and the create button becomes an enabled blue "Edit" button.

TRANSACTIONS INVOICES CUSTOMERS		ADMIN + SETTINGS +
	+ CREATE	
General Information		^
Tind *	Last S	
real r	Phone	
Oustane 10		
Billing Address		^
Stret	Aps Unit	
City Postal Code	State	
Shipping Address	C) COPY BILLING ADDRESS	^
Giret	RECOMMENDANCE ADDRESS	
City	fiteto	<u>.</u>
Postel Carle	Linuty United States	

## **Customer Details Page**

red if not filled in.

*Fig. 30 (right)* – the Create a Customer page. There are four collapsible sections: General Information, Billing Address, Shipping Address, and Optional Information. Fields marked with asterisks are required and will turn

Clicking on the "Customers" heading next to the EVO Payments logo brings the user to the Recent Customers page (Figure 31). Here, the user can view the list of newly created customers or search for a specific customer via email address, phone number, customer ID, or billing postal code.

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#### **EVO Dashboard User Guide**

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Recent customers Create a new customer, search f	or a customer or select a customer to	lew details.			
E TAKE A PAYMENT	CREATE INVOICE	& ADD CUSTOMER	<u>Ser</u>	rch by Email Address	Q.
ID .	TIRST	LAST	EMAIL	PHONE	
cky_Bins	Olaf	Stanton	Therese40@yahoo.com	(323) 406-8226	
	Aylin	Will			
ernardoß1	Rachelle	Schinner	Rosella Strosin@hotmail.com	5463566264669	
anuela.Cremin57	Veda	Haley	Juliet_Bins@yahoo.com	(192) 133-4483	
yman.Haley34	Gliberto	Osinski	Robyn17/Dgmail.com	202908672067814	
a_Mosciski86	Doug	Gutmann	Cleveland_McCullough@hotmail.com	1584894300809742	
quan.Willms	Nikita	Rath	Jackeline10@hotmail.com	(023) 571-9826	
ikkt.Douglas	Era	Walker	fla.Kohler@gmail.com	(460) 125-3026	

*Fig.* **31** – the Recent Customers page. Using the search bar, users can search for a specific customer if the one they are looking for is not in the Recent Customer list.

Clicking on a customer from the list or search results takes the user to a Customer Information page. From this page, merchants can view and edit customer information, as well as view details related to their most recent 10 transactions (Figure 32).

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General Information								^	
Pist Adeline				Lest Buckridge					
Email				Phone					
Customer ID									
Billing Address								v	
Shipping Address								~	
Optional Information	1							~	
Customer Transactio	ons							^	
DATE/TIME	INVOICE NUMBER	APPROVAL CODE	AMOUNT	TYPE	LAST 4	CARD TYPE	STATUS		
03/14/2018 8:40 AM		6M3JIY	\$850.99	AUTH	6311		Captured		

*Fig.* 32 – the Edit Customer page. In this figure, only the "General Information" and "Customer Transactions" sections are not collapsed. By clicking the "Edit" button, a merchant can edit customer information in any of those fields.

# Wallet Customer Creation

The EVO Snap\* platform will automatically generate a Wallet Customer Account when a payment is processed using a new PAN or card number. This account saves with the cardholder's first and last name only. If a merchant wishes to use this cardholder for any future invoicing, the cardholder's email address must be added to their associated customer details, otherwise the merchant will not be allowed to create an invoice for that specific customer.

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Also, the cardholder will not receive an email receipt for an initial payment with a new PAN or card number because there is no email associated with their Wallet Customer Account. Should the cardholder request a receipt, the cardholder must provide an email address and the merchant can provide their receipt by going to the transaction page for that payment and clicking on the "Email Receipt" button (Figure 33).

	EXP PAYMENTS TRANSACTIONS INVOICE						
			√ EMAIL RECEIPT	D PROCESS REFUND			
	Payment Details						^
	DATE/TIME	INVOICE NUMBER	APPROVAL CODE	AMOUNT TYPE	LAST 4	CARD TYPE STATUS	
	03/15/2018 2:58 PM		14ML39	\$22.00 AUTH	1111	Captured	
<i>Fig. 33 (right)</i> – the Email Receipt pop- up. This pop-up is accessed by clicking on the "Email Receipt" button on a Payment Details page.	Transaction Family without exit fugures 2 serve			Confirm Linual nu would like to send a receipt to	.cxe 1797	: Noti Statos Captural	

# **Roles and Permissions**

In this current version of Dashboard, all merchants will be on-boarded with the Merchant Admin role. Merchants are unable to change their own assigned role's permissions – if a merchant wishes to have higher permissions granted, please contact Customer Support at <u>TS@evopayments.com</u>.

The following information outlines those higher permissions accessible through the Admin dropdown menu:

## Admin

The Admin drop-down menu has four sections included: Merchants, Roles, Catalog, and Request New User.

#### Merchants

The Merchants option in the Admin drop-down menu brings the user to a page with a list of merchants (Figure 34).

PAYMENTS TRANSACTIONS INVOICES CUS	TOMERS			admin ★ settings ★
NAME	INDUSTRY	MERCHANT PROFILE ID	LOCATION	LAST UPDATED
Dashboard Demo	Retail	DashboardTest	Retail	03/12/2018 4:14 PM

Fig. 34 - the Merchant List page. This page contains a clickable list of all the different merchants associated with this account.

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Clicking on one of the merchants in the list brings the user to that merchant's general information page (Figure 35). General information about the merchant, such as customer service email, customer service phone number, default language, and location can all be edited from this page, but merchant profile ID, terminal ID, and industry type cannot be changed; merchant name can only be changed by contacting the technical support team at <u>TS@evopayments.com</u>.

	# CANCE	3VA2 @	
General Information			-
Mechani Nene Dashboard Denis	٥	Debuil Longuege Linglich	-
Conterner Service Bread (pcgRipc.org		rivershamt Profile to DeshiboandTest	
Contorner Service Phone (423) 466-6410		Terrscall.0 98793452190501	
Industry FileEall		Location 456	
Business Address Informatio	n		,
Address Line 1 600 17th St.		Address Live 2 Suite 703N	
City/Town Denver		State Province Dolaradio	
Postal Code 80/20/2		Country United States	

*Fig. 35 (left)* – the Merchant Information page. From this page, some merchant information can be edited, such as customer service email, customer service phone number, location, and default language, and the business address information can be edited as well.

The merchant's business address information can also be edited – this information is what appears in the top left corner of invoices.

**Note**: if a merchant's business address information was updated after an invoice was created, a new invoice must be created – invoices do not automatically update to reflect updated merchant information.

#### **Roles**

Again, for this version of Dashboard, all merchants will be on-boarded as a Merchant Admin by default. However, in future versions of Dashboard, roles will be broken out into Master Merchant Admin, Master Merchant User, Merchant Admin, and Merchant User, with Master Merchant Admin being the highest level role available and Merchant User being the lowest level role available.

Also, users are unable to modify roles' permissions that are higher than their own – for example, Merchant Admin level users will be able to modify permissions for the Merchant User role but not for the Master Merchant Admin and Master Merchant User roles, or for their own Merchant Admin role.



#### Catalog

**Note**: the Catalog section of Dashboard is only available to merchants at the Merchant Admin level or higher.

Clicking on the "Catalog" option in the Admin drop down menu brings the user to a page with a list of catalog items (Figure 36). Merchants can search for a specific catalog item by description, code/SKU, unit price, tax rate, or date updated. There are also quick navigation options for creating an invoice and adding a new catalog item.

PAYMENTS TEANSACTION	IS INVOICES CLISTOMERS				ADMIN - SETTINGS -
Catalog					
he catalog feature allows users to	add items in a centralized place making	g these items available	le in the	e invoice creation process.	
B CHEATE INVOICE	♦ ADD CATALOG ITTM			Search by Description	Q
COTE/INU	UNIT P	PRICE TAX R	are.	DISCUIPTON	DATE UPDATED
				estenarios Best wesh for the best price. No known problems. Available in gold, rose gold, end silver.	DATE UPDATED 05/25/2018 1:14 PM
Analog 3.324 (4	54		8 %		
cossner Anelog 3.324 (4 555 30_Small Frozen	54) 5	5.68 5.61 4.54	8%	Best wetch for the best price. No known problems. Available in gold, rose gold, and plver.	05/25/2018 1:14 PM

*Fig. 36* - the Catalog page. The items on this page are listed by newest created catalog items at the top, by default.

Selecting "Create an Invoice" brings the user to the updated <u>Create an Invoice</u> workflow, as outlined in the Invoices section above.

Clicking on "Add Catalog Item" brings the user to a page where they can enter details about their new catalog item, such as code/SKU, unit price, tax rate, and item description (Figure 37).

EVO PAYMENTS TRANSACTIONS IN	NVOICES CUSTOMERS				admin ≠ settings ≠
			+ CREATE		
	Code/SKU * 0/20 Description *	\$ Unit Price *		Tax Rate <b>%</b>	
PAYMENTS INTERNATIONAL TRANSACTIONS I	NVOICES CUSTOMERS				ADMIN - SETTINGS -
		€ EDIT	DELETE	_	
	CoderSKU 0700990.461 Description Blue Police Box, bigger on the outside	Unit Price \$ 13.00	Tax Rate	Date Updated 05/29/2018 8:53 AM	
				38 / 250	

Fig. 38 - the Catalog Item Details page, with the "Date Updated" section boxed in red.

Once the required fields are filled in, clicking the "Create" button adds the catalog item and adds a uneditable "Date Updated" field to the details where the date and time of item creation can be seen (Figure 38). From this Catalog Item Details page, the merchant can edit, delete, or copy the catalog item, each of which are explained in more detail below.



Clicking on a specific catalog item from the list brings the user to a page with details about that item (Figure 40). From there, the merchant can edit the catalog item information, such as code/SKU, unit price, tax rate, and item description. Editing and saving any of these fields will update the "Date Updated" field for that catalog item.

PAYMENTS TRANSACTIONS IN	IVOICES CUSTOMERS				ADMIN ▼ SETTINGS ▼
		C≇ EDIT 🚔 1	DELETE 원 COPY		
	Code/SKU 0700900461	Unit Price \$ 13.00	Tax Rate %	Date Updated 05/29/2018 8:53 AM	
	10/20 Blue Police Box, bigger on the outside			<i>(</i>	
				38 / 250	

*Fig. 40* - the Catalog Item Details page. Clicking on "Edit" enables the user to edit all details about the item, except for "Date Updated", which will update automatically once the changes are saved.



The merchant can also delete the catalog item – clicking the red "Delete" button brings up a confirmation message (Figure 41) and, once confirmed, will then navigate back to the main catalog page with that catalog entry deleted.



Additionally, merchants can copy the existing catalog item. Clicking "Copy" brings the user to a similar looking page as the Add a Catalog Item page, though the fields are already populated with the same content as the catalog item that was copied (Figure 42). Here, the merchant can edit any fields they desire before creating the copied catalog item. Please note that merchants are not required to change any fields as Dashboard does allow for duplicate entries for catalog items.

PAYMENTS INTERNATIONAL TRANSACTIONS IN	IVOICES CUSTOMERS			ADMIN 👻 SETTINGS 👻
		+ CREATE		
	Code/SKU * 0700900461 10/20	Unit Price * \$ 13.00	Tax Rate %	
	Description * Blue Police Box, <mark>smaller on the outside</mark>		<i>h</i>	
			39 / 250	

*Fig.* 42 - the copied catalog item's details page. Note that the fields are pre-populated with the same information as the original catalog item, which can be edited before creating the new item (seen highlighted above). Also note that the fields can be left exactly the same as the original item, as Dashboard does allow for the creation of duplicate catalog items.



#### **Request New User**

Clicking on the "Request New User" option in the Admin drop-down menu opens a pop-up explaining how to set up a new merchant account (Figure 43). In this current version of Dashboard, merchants must contact Customer Support at <u>TS@evopayments.com</u> in order to set up a new Dashboard user account.



*Fig. 43 (left)* – the "Request New User" pop-up, which explains what steps need to be taken in order to set up a new Dashboard user account. Merchants must contact Customer Support in order to set up a Dashboard user account.

#### Permissions

Due to the Dashboard workflow, some permissions are dependent on others. Most notably, the process of creating an invoice and the ability to edit a customer are interrelated. Thus, in the permissions page for a user (Figure 44), when a user attempts to turn off the specific "Edit Customer" module or overall "Customers Module", a pop-up appears warning the user that disabling either module also disables the "Create Invoice" module (Figure 45 and 46).



*Fig.* 44 – the permissions for a Merchant Admin showing the default permissions associated with that role. Note, these permissions are only editable by a user with a higher role – not by the user themselves. Also, merchants will be unable to see roles higher than their own – thus, if the user was only a Merchant User, the only option they would see in the top left menu is "Merchant User".



*Fig. 45 (left) and Fig. 46 (right)* – the warning pop-up that appears when attempting to disable either the overall "Customers Module" or the specific "Edit Customer" module and the resulting permission settings when the "OK" button is clicked. Clicking "Cancel" on the warning pop-up will return the permission settings to their previous positions.

Conversely, if the Customers module is disabled and the user attempts to enable the "Create Invoice" module, a pop-up appears warning enabling the "Create Invoice" module also enables the "Customers Module" (Figure 47).



*Fig.* **47** (*right*) – the warning pop-up that appears when attempting enable the "Create Invoice" module.

Another important permission to note is the "Transactions Module". If this module is disabled, transaction features will be disabled across all Dashboard pages, not just the Transaction specific pages. Related Transactions details on customer and invoice pages will be disabled and hidden, as well.

# Settings

Clicking on "Settings" in the top right corner of the Dashboard homepage opens a drop-down menu with three options: My Account, About, and Logout.

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## **My Account**

Clicking on "My Account" from the Settings drop-down menu brings the user to a page with their account information (Figure 48). General information, such as name, email address, username, preferred time zone, and default language can be edited. If the user has the appropriate permissions, merchant profile ID and assigned role can also be changed here.

TIONS INVOICES CUSTOMERS	ADMIN 👻 SETTINGS 👻
(2 EDIT	
General Information     Other Language       Preferred Time Zone     English       Americal/Denver     English       Assessed Rise     English	
Change Password ~	
Update Security Answers ~	

*Fig. 48* – the My Account page. Merchant account information can be edited here, assuming the merchant has the required permissions. Required fields will turn red if clicked on and left blank.

Users also have the option on this page to change their password. They must correctly enter their current password, otherwise their password will not be updated. Please note that passwords must have at least 7 characters, an uppercase letter, a lowercase letter, a number, and a special character in order to be accepted, and the new password cannot be the same as any of the four previous passwords.

Security answers can be updated from this page, as well. The current password must be entered correctly before any security answers can be updated – security questions cannot be changed. As mentioned in the First Time Login section, users must select three different security questions to use to access their account in the case of a forgotten password.

**Note:** If a user does not log in to their account for 90 days, they will be locked out of Dashboard and must contact Customer Support at <u>TS@evopayments.com</u> in order to regain access to their account.



## About

The "About" option in the Settings drop-down menu brings up the pop-up displayed in Figure 49. This pop-up gives information about EVO Dashboard, such as the version number and the customer support email address.



*Fig.* **49** (*right*) – the About pop-up for Snap\* Dashboard containing the versioning information and customer support contact email address.

# **Session Expiration**

If the user is inactive for more than 14 minutes, a pop-up will appear warning the user that their session is about to expire and asking if they would like to continue working (Figure 50). If the "Yes" option is not clicked within 1 minute of the pop-up appearing, then Dashboard will automatically sign out the user, displaying a pop-up stating that the session has expired (Figure 51). In order to continue using Dashboard, the merchant must sign back in.



Fig. 50 (left) and Fig. 51 (right) - the pop-ups that appear upon warning of session expiration and session expiration.

# **Reference Information**

For additional support, please contact Customer Support at <u>TS@evopayments.com</u>.