EVO® Snap

User Guide

Dashboard, Controlled Release Version

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).

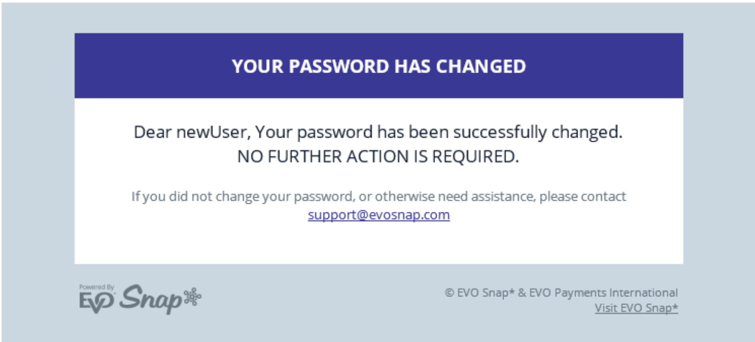


Fig.1 (left) and Fig. 2 (right) – the Change Password page and the email sent to merchants upon a successful password change.

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.

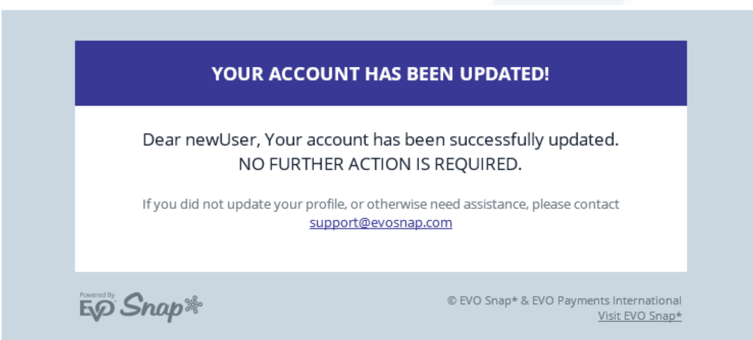


Fig. 4 (left) – the email message a merchant receives upon successful update of security question answers.

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.

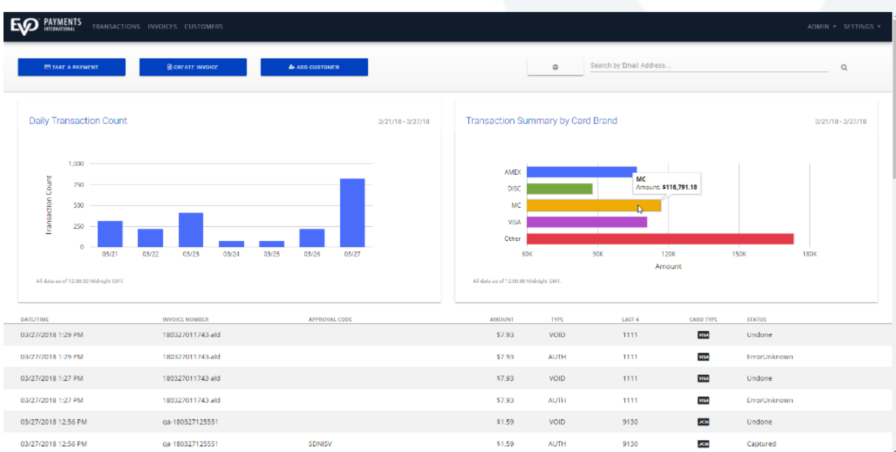


Fig. 6 (left) – the Dashboard homepage. Note that if the cursor hovers over a bar on either graph, a pop-up with more details about that specific heading appears; that feature can be seen here, demonstrated in the Transaction Summary by Card Brand graph.

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

Transactions

Take a Payment

Clicking on the blue “Take a Payment” button on the Dashboard homepage brings up the quick-payment 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).

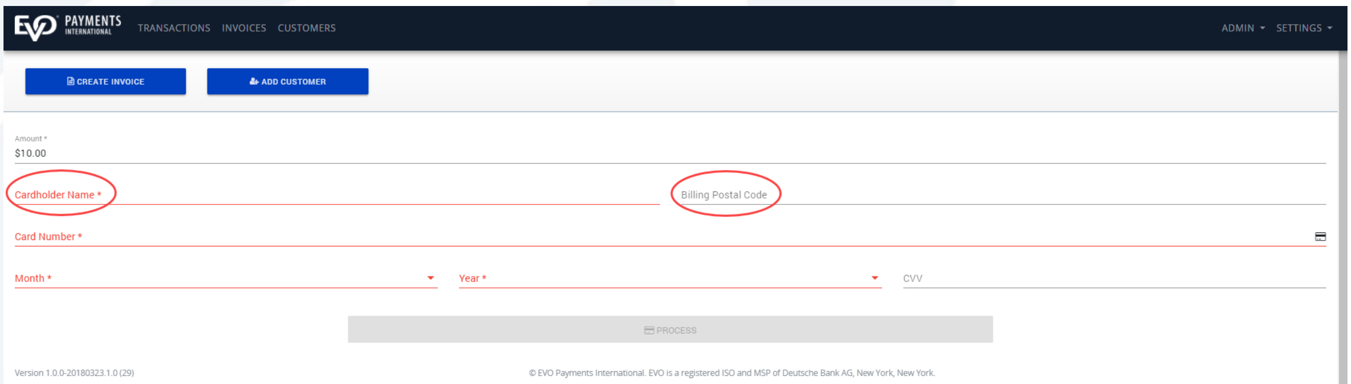


Fig. 7 – the Take a Payment page. Note that required fields return red when left blank. Also note that since the user is on the Take a Payment page, that button no longer appears as a navigation option

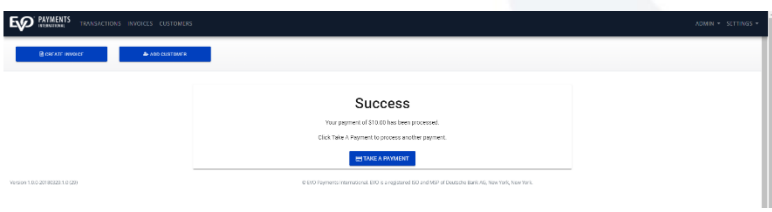


Fig. 8 (left) – The success message returned after a successful quick charge payment.

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.

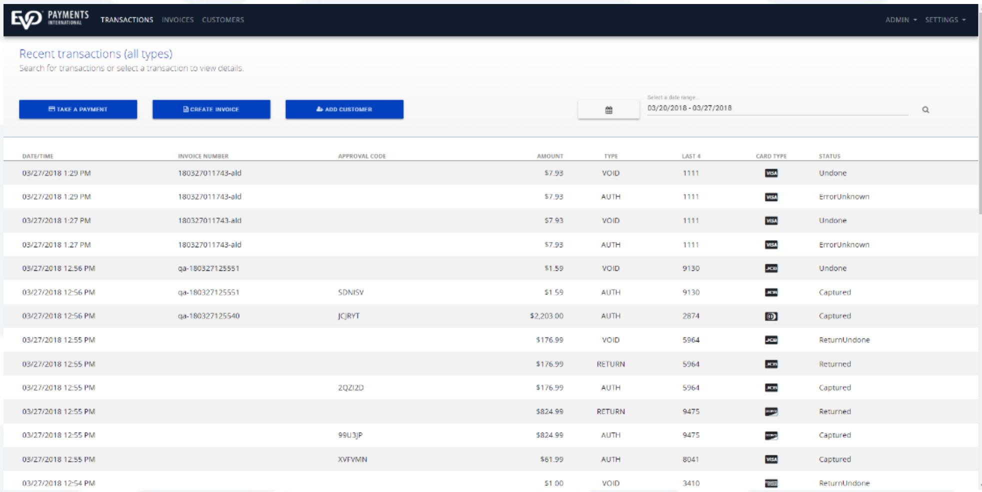


Fig. 9 (left) – the Recent Transactions page. Each transaction in the list is shown with the date and time it was processed, the amount of the transaction, the transaction type, last four digits of the card used, the card type, the current transaction status, and, if applicable, the invoice number and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

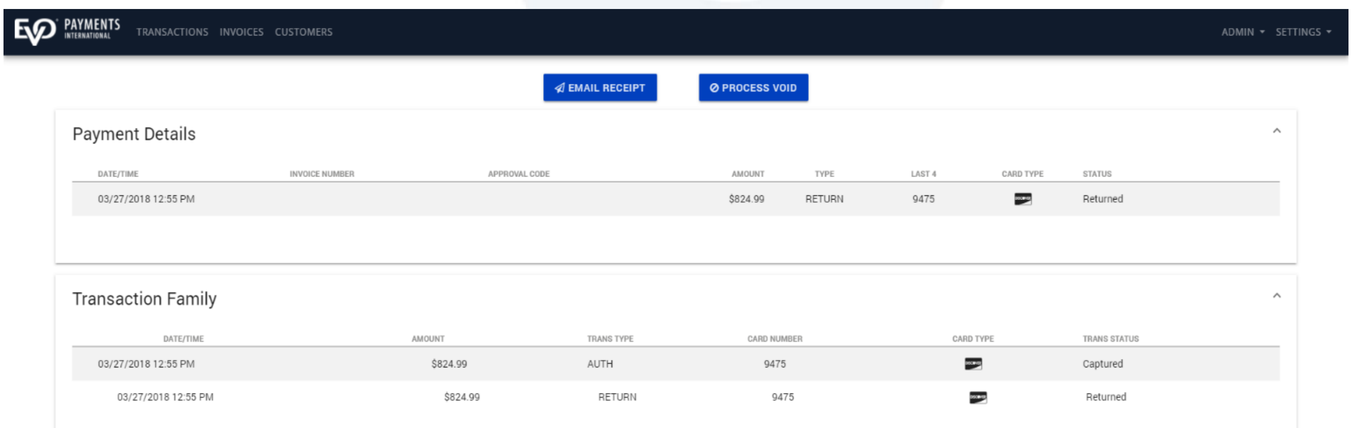
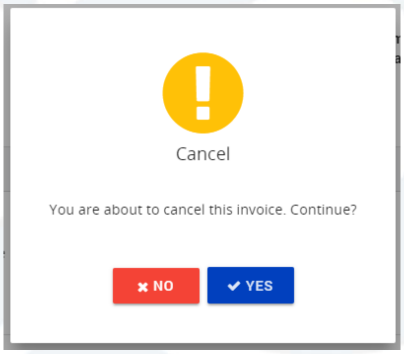


Fig. 10 – the Payment Details page. The Transaction Family section shows the transaction history and details for each transaction. The two available actions for this transaction are "Email Receipt" and "Process Void". Transactions in the "Transaction Family" section can be clicked on for more details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



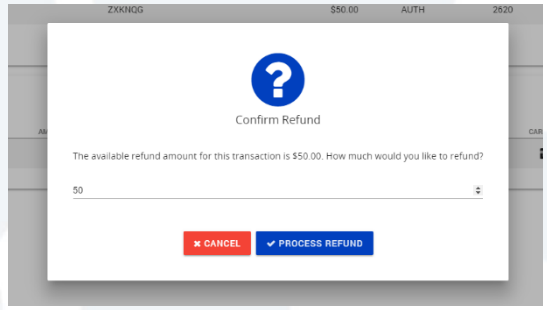


Fig. 11 (left) and Fig. 12 (right) – the "Cancel Invoice" and "Confirm Refund" pop-ups. Note that a partial refund can be issued by entering an amount less than the available refund amount listed.

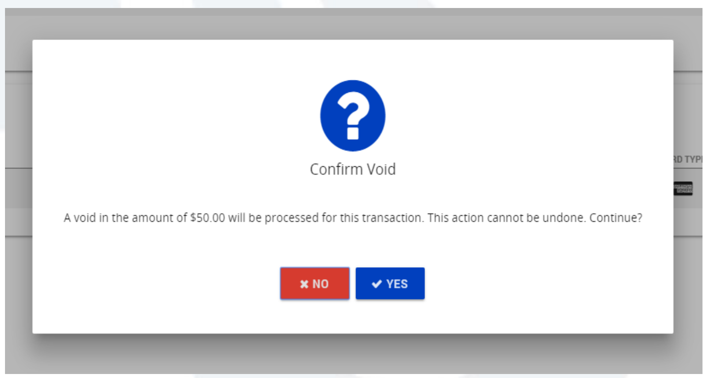


Fig. 13 – "Process Void" confirmation. Note that voids can only be processed on the same day the transaction was processed.

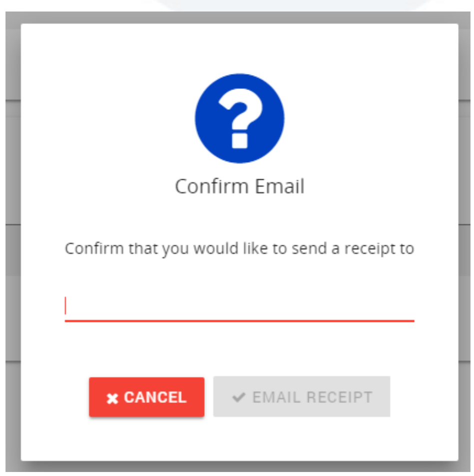


Fig. 14 – "Confirm Email" pop-up. Merchants can enter a specific email address that they wish to send a receipt to here.

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.

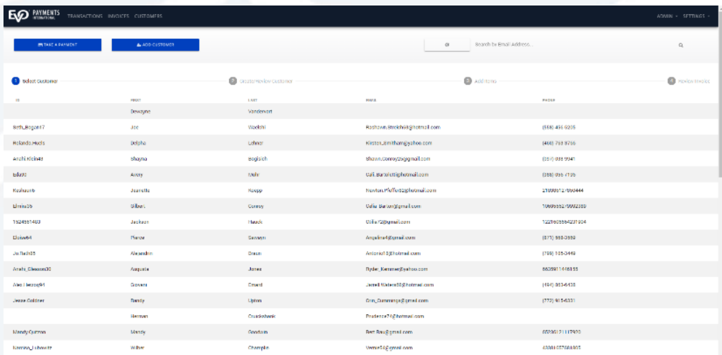
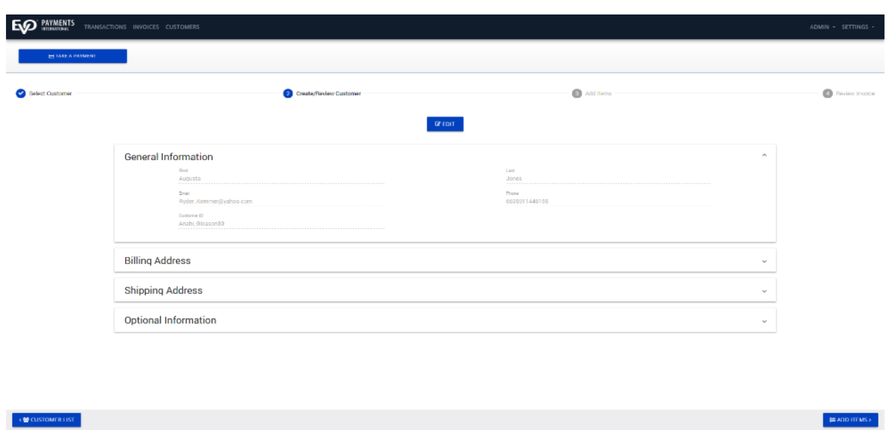


Fig. 15 (left) – the Create Invoice Customer Selection page. Use the search bar to search for a specific customer. If a new customer needs to be created, click on the “2: Create/Review Customer” heading.

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 invoice.



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.

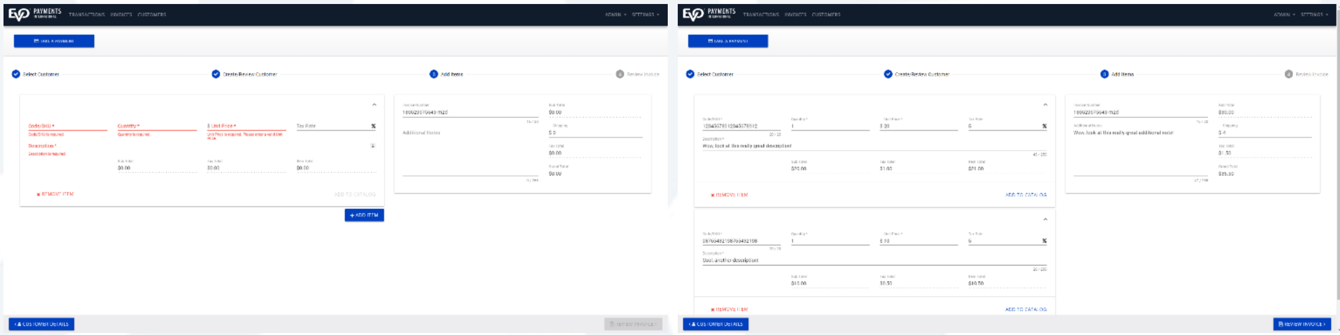


Fig. 17 – the Add Items page for invoices. Note that fields that are required turn red if left blank. The tax rate is applied as a percentage to two decimal places. Also note that if "Items" is left blank, "Shipping" rate becomes a required field. Also, the "Quantity" field can only be populated with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

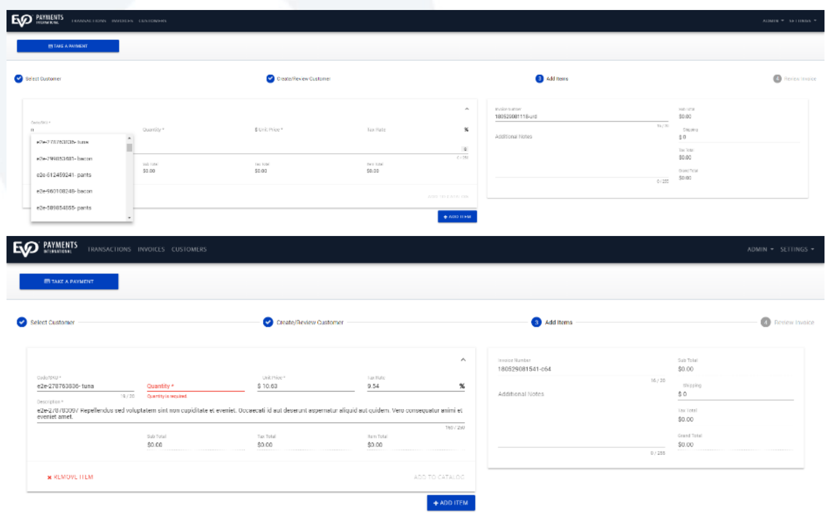


Fig. 18 (right) - the Add Items page for invoices showing the Catalog type-ahead feature. The top image shows the list of catalog items that contain the entered character and the bottom shows the auto-populated fields once an item is selected.

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.

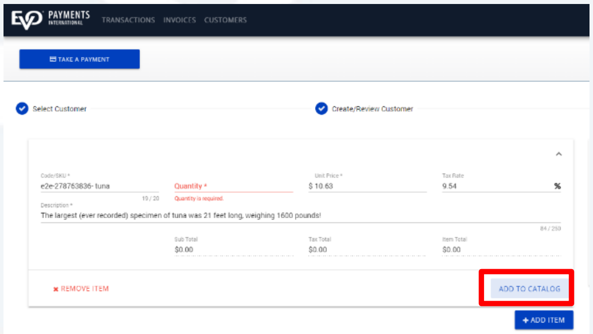
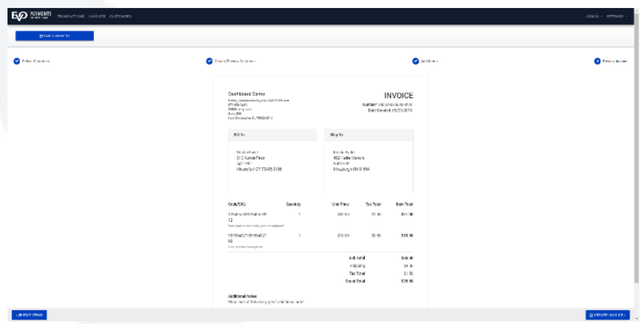


Fig. 19 (right) - the Add Items page for invoices showing the "Add to Catalog" button enabled because the description changed.

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.



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.

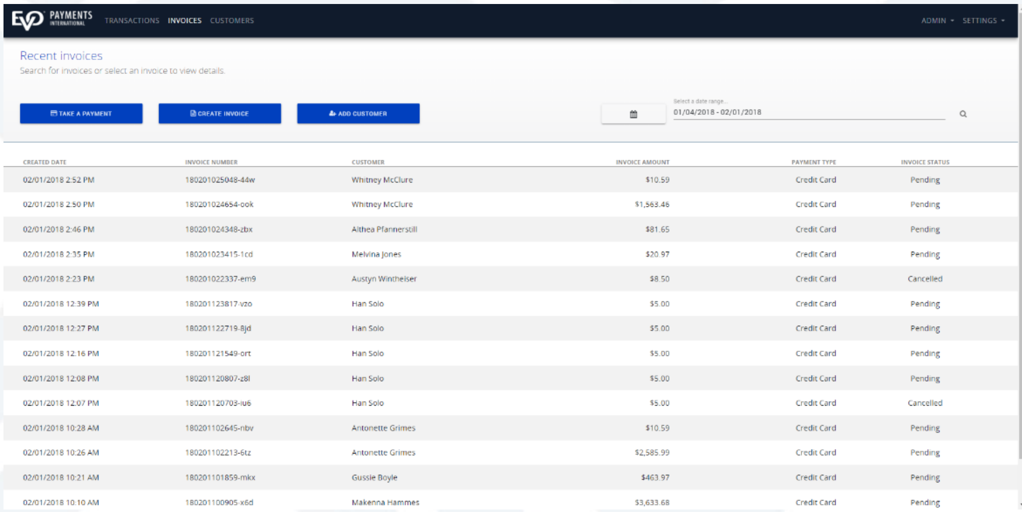


Fig. 21 – the Recent Invoices page. Merchants can click on a recent invoice from the list or can search for a specific invoice using the search function.

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".

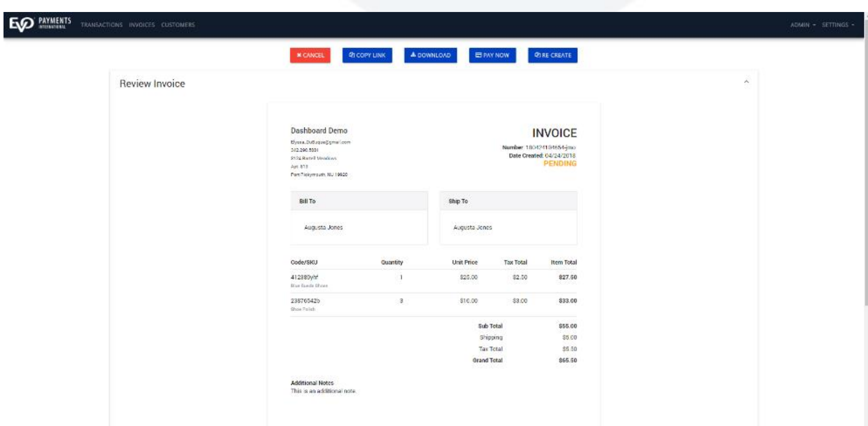
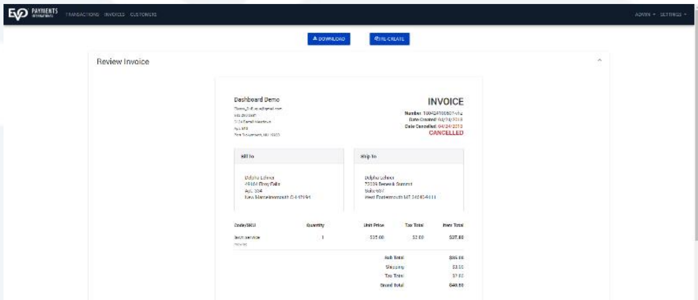


Fig. 22 – the top of the page to review a specific invoice. Note that this invoice matches the invoice that was created using the Create an Invoice workflow. The four buttons at the top of the page correspond to the actions available for that invoice.



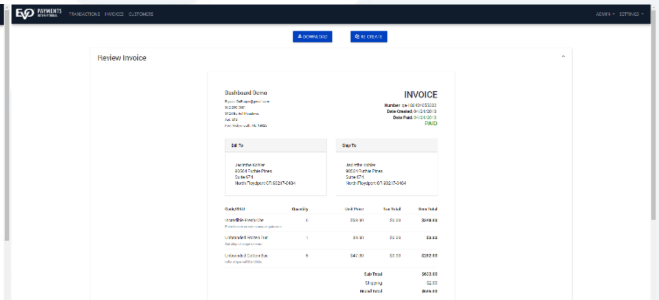


Fig. 23 (left) and Fig. 24 (right) – Cancelled and Paid invoices. Note that the only actions available for these invoices are “Download” and “Re-create”.

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.

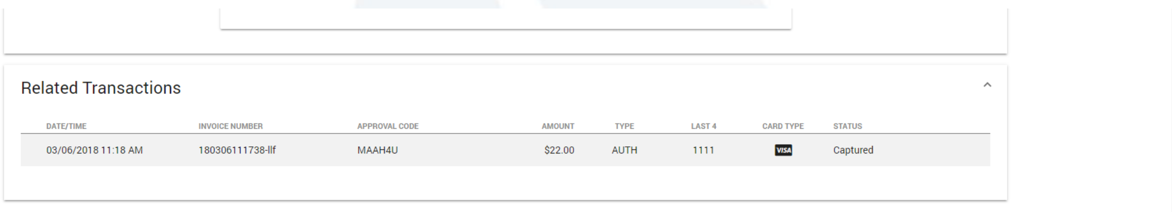
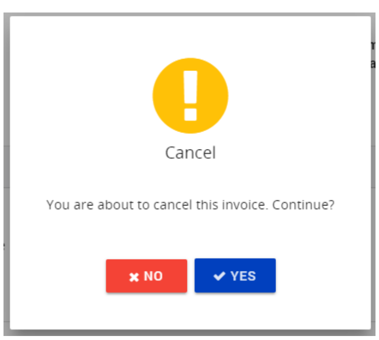


Fig. 25 – Related Transactions section for an invoice. This section shows the associated “Captured” transactions for a particular invoice. Note that any other transaction statuses will not appear in the list – for further transaction details, users must navigate to the Payment Details page by clicking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

Copy Link

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.

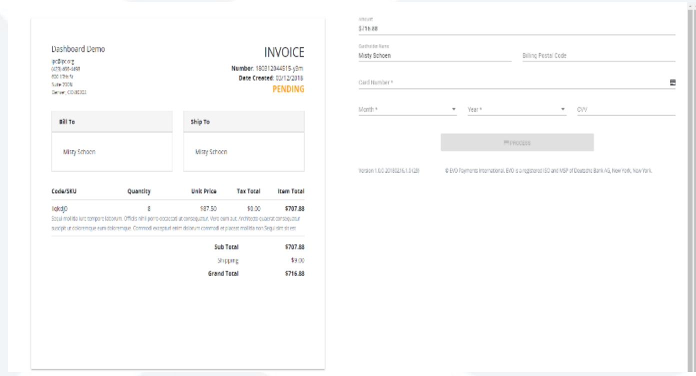


Fig. 27 – the Invoice Payment page.

Download

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 has a payment web address link at the bottom and a "Pay Now" button that both redirect to the Invoice Payment page when clicked (Figure 28).

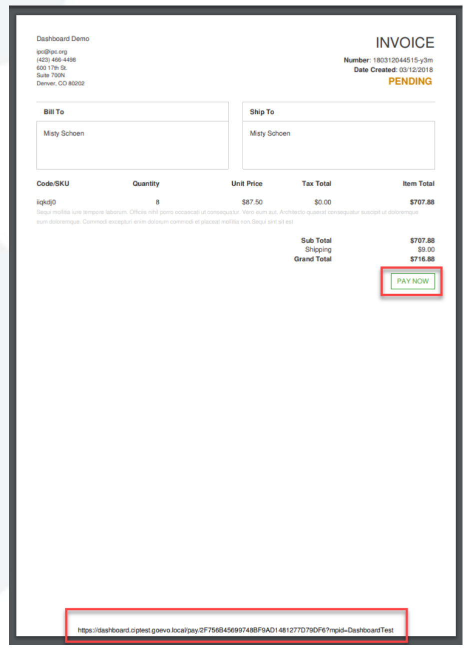


Fig. 28 (right) – a downloaded pending invoice. The red boxes show the "Pay Now" button and the payment web address link that can be copied and pasted into a web browser which both redirect to the Invoice Payment page.

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).

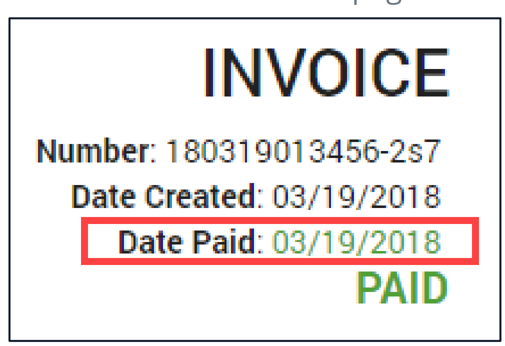


Fig. 29 (right) – a closer look at the "Date Paid" time stamp on a paid invoice.

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.

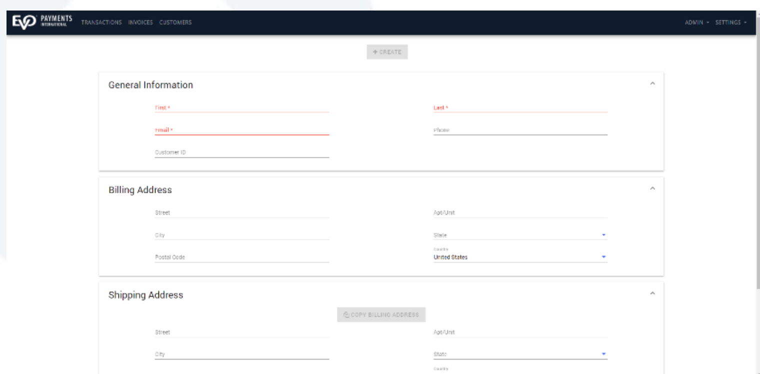


Fig. 30 (right) – the Create a Customer page. There are four collapsible sections: General Information, Billing Address, Shipping Address, and Optional Information. Fields marked with asterisks are required and will turn red if not filled in.

Customer Details Page

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.

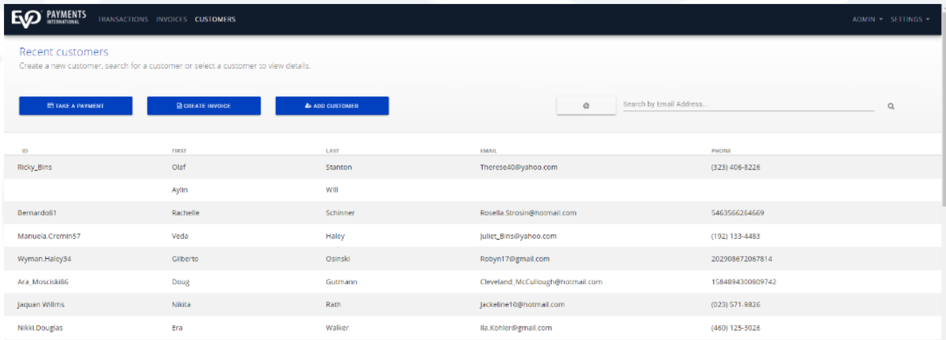


Fig. 31 – the Recent Customers page. Using the search bar, users can search for a specific customer if the one they are looking for is not in the Recent Customer list.

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).

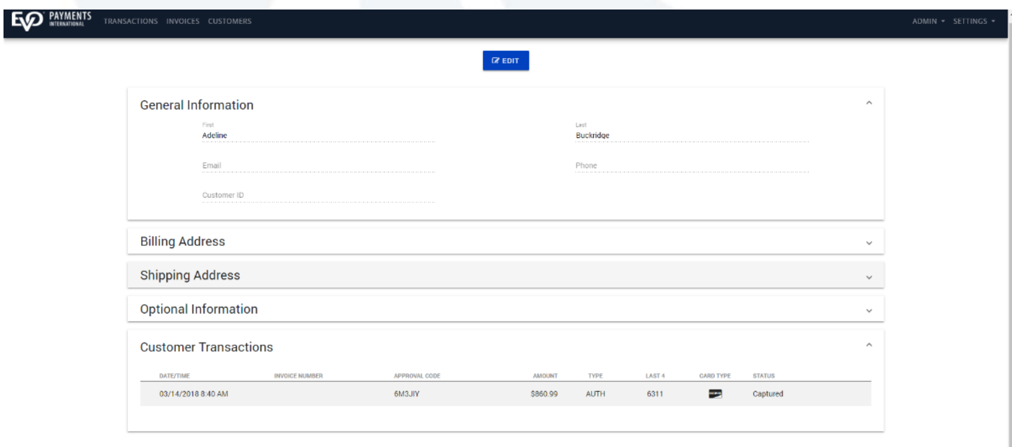


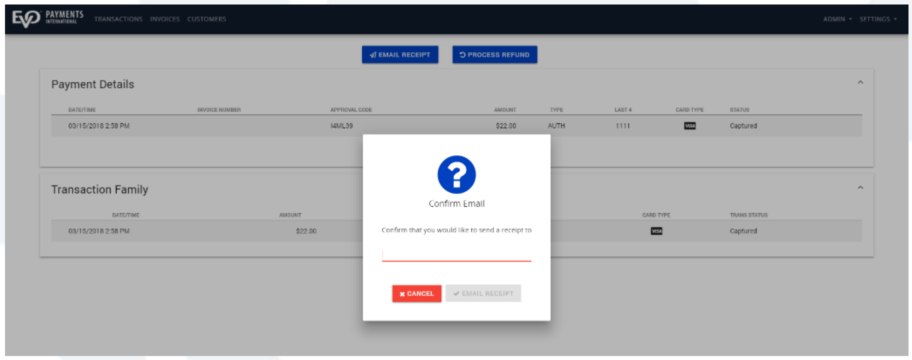
Fig. 32 – the Edit Customer page. In this figure, only the “General Information” and “Customer Transactions” sections are not collapsed. By clicking the “Edit” button, a merchant can edit customer information in any of those fields.

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.

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).

Fig. 33 (right) – the Email Receipt pop-up. This pop-up is accessed by clicking on the "Email Receipt" button on a Payment Details page.



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 TS@evopayments.com.

The following information outlines those higher permissions accessible through the Admin drop-down 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).

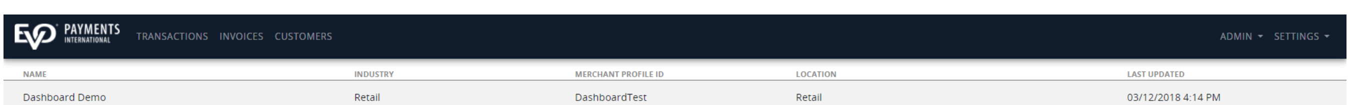


Fig. 34 – the Merchant List page. This page contains a clickable list of all the different merchants associated with this account.

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 TS@evopayments.com.

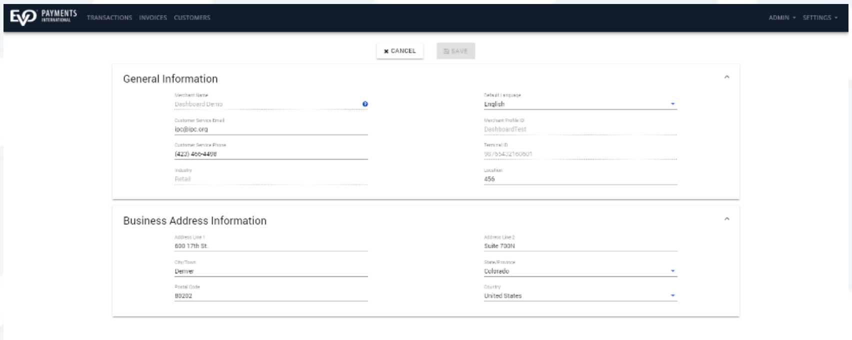


Fig. 35 (left) – the Merchant Information page. From this page, some merchant information can be edited, such as customer service email, customer service phone number, location, and default language, and the business address information can be edited as well.

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.

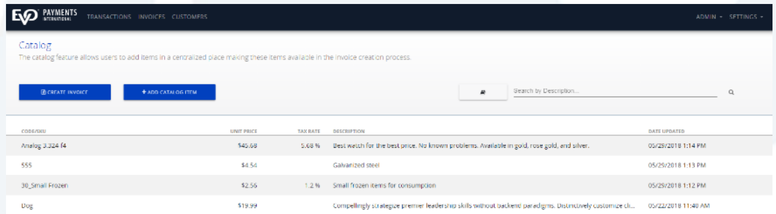
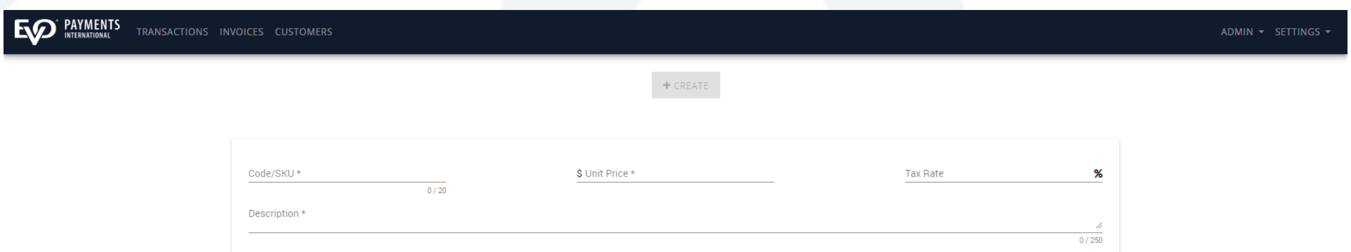


Fig. 36 - the Catalog page. The items on this page are listed by newest created catalog items at the top, by default.

Selecting "Create an Invoice" brings the user to the updated Create an Invoice 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).



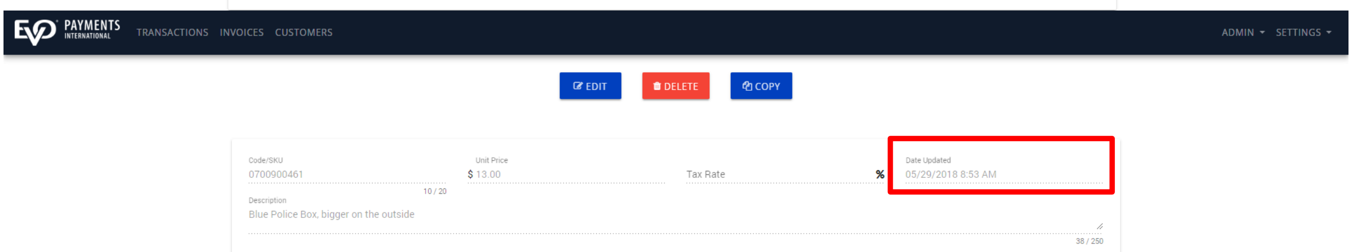


Fig. 38 - the Catalog Item Details page, with the "Date Updated" section boxed in red.

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.

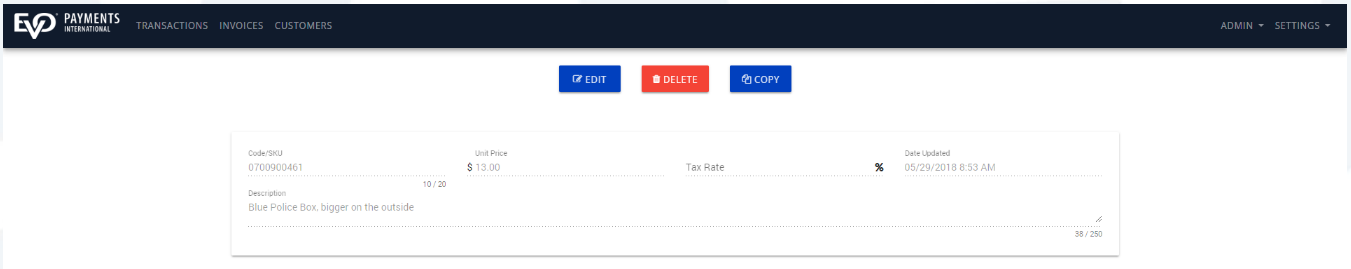
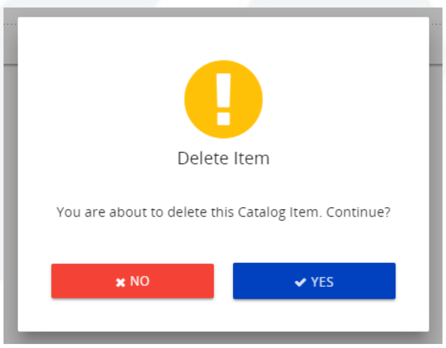


Fig. 40 - the Catalog Item Details page. Clicking on "Edit" enables the user to edit all details about the item, except for "Date Updated", which will update automatically once the changes are saved.



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.

Fig. 41 (left) - the Delete Catalog Item pop-up.

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.

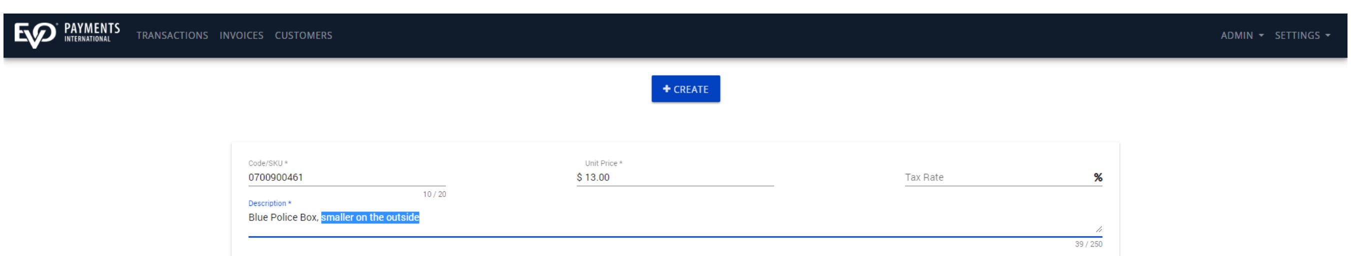


Fig. 42 - the copied catalog item's details page. Note that the fields are pre-populated with the same information as the original catalog item, which can be edited before creating the new item (seen highlighted above). Also note that the fields can be left exactly the same as the original item, as Dashboard 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 TS@evopayments.com in order to set up a new Dashboard user account.

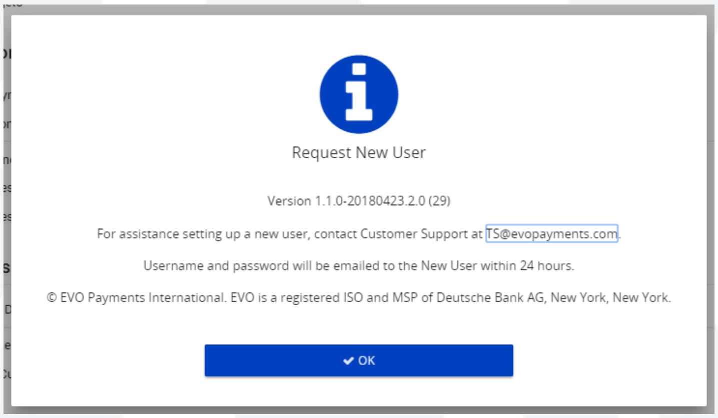


Fig. 43 (left) – the “Request New User” pop-up, which explains what steps need to be taken in order to set up a new Dashboard user account. Merchants must contact Customer Support in order to set up a Dashboard user account.

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).

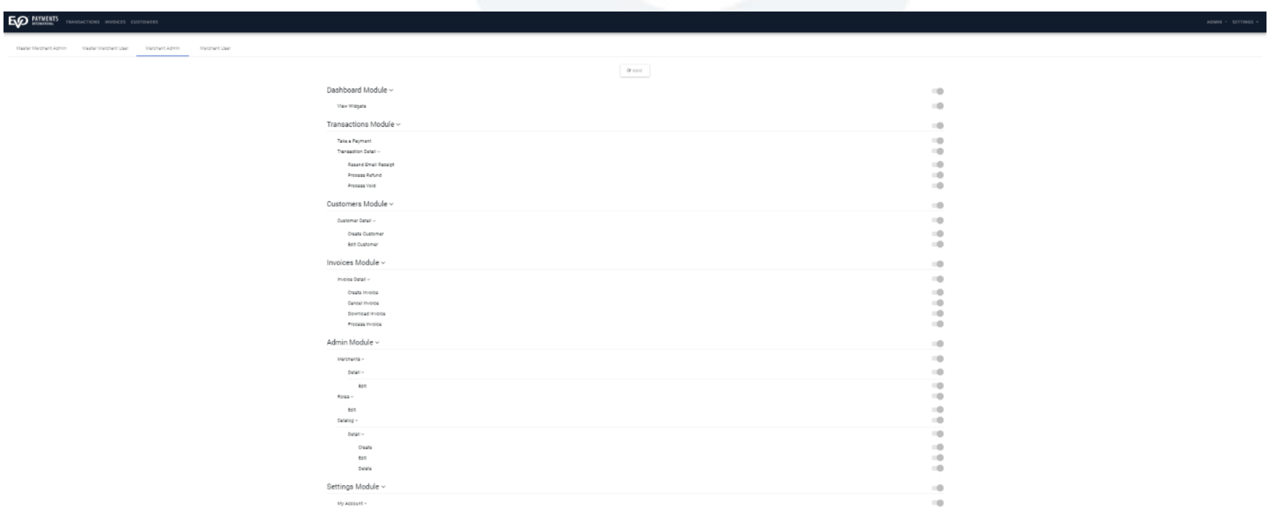
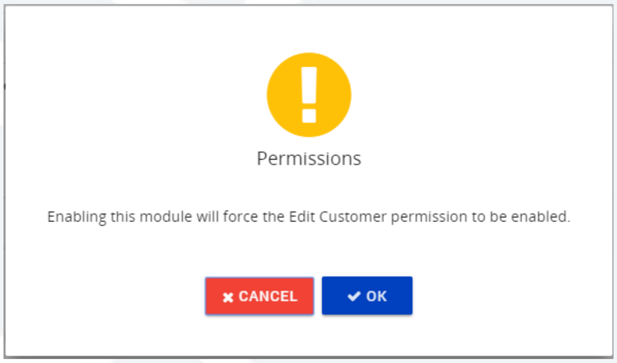


Fig. 44 – the permissions for a Merchant Admin showing the default permissions associated with that role. Note, these permissions are only editable by a user with a higher role – not by the user themselves. Also, merchants will be unable to see roles higher than their own – thus, if the user was only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



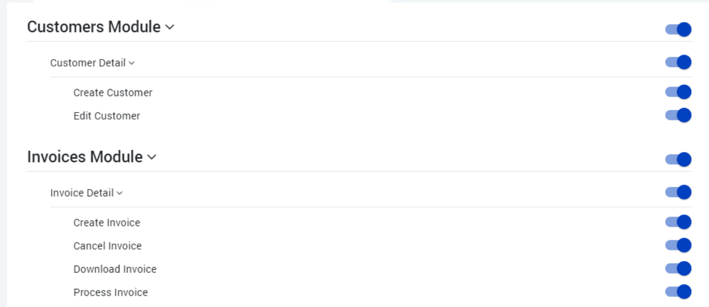


Fig. 45 (left) and Fig. 46 (right) – the warning pop-up that appears when attempting to disable either the overall "Customers Module" or the specific "Edit Customer" module and the resulting permission settings when the "OK" button is clicked. Clicking "Cancel" on the warning pop-up will return the permission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

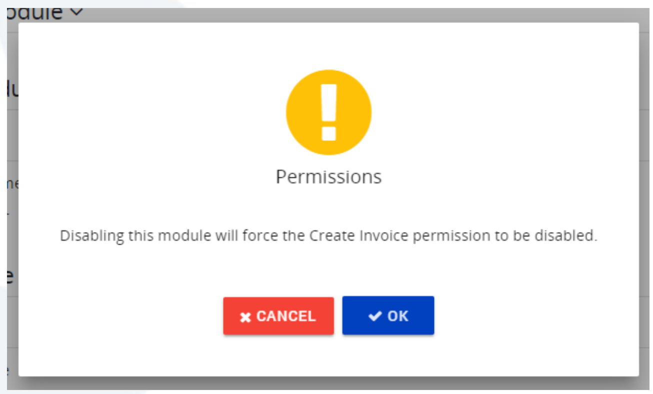


Fig. 47 (right) – the warning pop-up that appears when attempting enable the "Create Invoice" module.

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.

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.

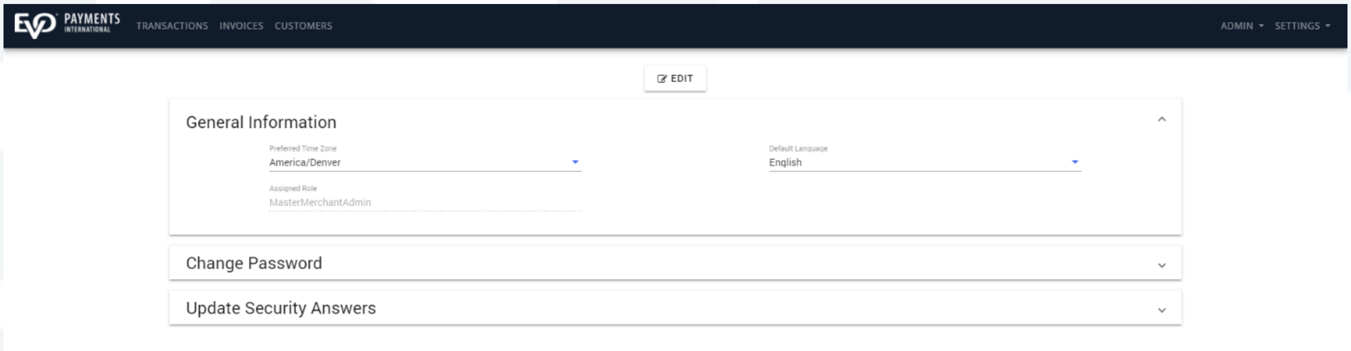


Fig. 48 – the My Account page. Merchant account information can be edited here, assuming the merchant has the required permissions. Required fields will turn red if clicked on and left blank.

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 TS@evopayments.com 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.

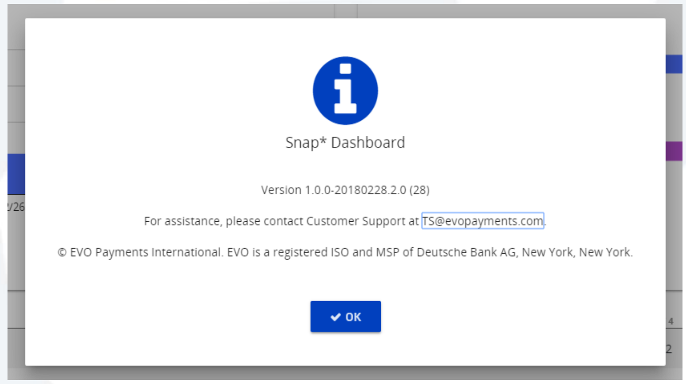
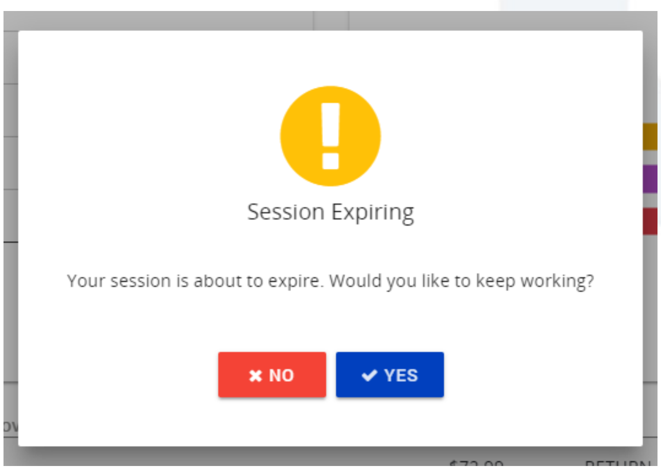


Fig. 49 (right) – the About pop-up for Snap* Dashboard containing the versioning information and customer support contact email address.

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.



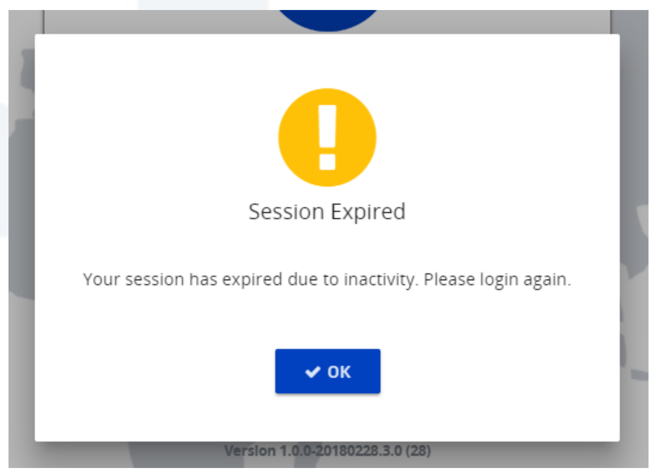


Fig. 50 (left) and Fig. 51 (right) – the pop-ups that appear upon warning of session expiration and session expiration.

Reference Information

For additional support, please contact Customer Support at TS@evopayments.com.