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User Guide Dashboard, November 2018

EVO Dashboard Overview	
First Time Login	3
Homepage	5
Transactions	6
Invoices	9
Subscriptions	15
Customers	
Roles and Permissions	21
Settings	27
Channel Branding	
Reference Information	



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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.



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.

PAYMENTS TRANSACTIONS	INVOICES SUBSCRIPTIONS	CUSTOMERS						ADMIN + SETTINGS +
STARE A PARMENT	ADD CUSTOMER			0	Search by Er	nail Address		٩.
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000 2276 11.0 0 0 0001 All date st of 120000 Misright GMT.	04/52 04/03	0506 0507		AVEX DISC MSA Other 0 All-dese strift 150000 Milonight Out.	25K	50K Amount	Other Amount \$15,786,29 7EK	9 100K
STATIME	INVERCE NUMBER	APPRIVAL C			7996	LAST 4	CAND TYPE	STATUS
37/2018 7:00 AM	qa-180731072812-0 180723080306-072-2	611755 NIF8VZ	NotVerified	\$833.00	AUTH	2544	8	Captured
7/2018 4:28 AM	qa-180807102816	NJr072	NotVerified	\$1.59	VOID	5403		Undone
7/2018 4:28 AM	qa-180807102816	8WWBD9	NatVerified	\$1.59	AUTH	5403		Captured
7/2018 4:28 AM	qa 180807102802	QKNP4Z	NotVerified	\$1.745.00	AUTH	6449		Captured
7/2018 4:27 AM			NotSet	538.99	VOID	3758		ReturnUndone

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 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).

	TRANSACTIONS	INVOICES	SUBSCRIPTIONS	CUSTOMERS					ADMIN ~	SETTINGS 🗸
CREATE INVOICE	ADD CUSTOMER									
Amount \$ 10.00										
Cardholder Name *						Billing Postal Code)			
Card Number *									 	
Month *				▼ Year *			-	CVV		
Version 2.0.0-201807181 (29	0				© EVO Payments Internation	nal. EVO is a registered ISO and MSP	of Deutsche Bank AG, New Yo	ark, New York.		

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 INVOLUTI SUITS	RUPTIONS CUSTOM/INS	ADMIN ~ SETTINGS ~
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	-	
	Success	
	Your payment of \$10.00 has been processed.	
	Click Take A Payment to process another payment.	
	ET TWE A PAYNERT	
Version 1.00-20180323.1.0 (29)	© 600 Fayments international, 600 is an approved 60 and HBP of Deutsche Bank AG, New York, New York,	

Fig. 8 (left) – The success message returned after a successful transaction 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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	ACTIONS INVOICES SUBSCRIPTIONS CUS	TOMERS					A	imin v settings v
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DATE/TIME	INVOICE NUMBER	APPROVAL CODE	POSTAL CODE RESULT	ANCUNT	TYPE	L45T.4	CARD TYPE	STATUS
08/07/2018 7:00 AM	ga-180731072812-0	611755	NotVerified	\$833.00	AUTH	2544		Captured
58/07/2018 7:50 AM	180723080906407242	NJF8V7	NotVerified	\$144.00	AUTH	1111		Captured
8/07/2018 4:28 AM	qa-180807102816		Notiverified	\$1.59	VOID	5403	100	Undone
8/07/2018 4:28 AM	qa-180807102816	SWWBD9	NotVerified	\$1.59	AUTH	5403	20	Captured
8/07/2018 4:28 AM	qa-180807102802	QKNP4Z	Notverified	\$1,745.00	AUTH	6449		Captured
8/07/2018-1:27 AM			Notfet	\$18.01	VOID	3753	P	SetunUndone
8/8///2018 4/27 AM			Nother	\$38.99	RETURN	3/58		Returned
8/07/2018 4:27 AM		TEORCE	NoMatch	\$38.99	AUTH	3758		Captured
18/07/2018 4:26 AM			NotSet	\$660.93	RETURN	4821	10	Returned
8/07/2018 4:26 AM		CBF2VY	NotSet	\$660.99	AUTH	4821	D	Captured
8/8///2018 4:26 AM		Painge	NoMatch	\$359.99	AUTH	4542		Captured
8/87/2018 4:26 AM			NotSet	\$452.00	VOID	6480	100	ReturnUndone
8/87/2018 4:26 AM			Not5et	\$452.93	VOID	6480	-	ReturnUndone
9/97/2018 4:25 AM			NotSet	\$452.99	RETURN	6483	1732	Returned
8/07/2018 4:25 AM			NotSet	\$152.00	RETURN	6180	1154	PartiallyReturned

Fig. 9 (*left*) – the Recent Transactions page. Each transaction in the list is shown with the date and time it was processed, the postal code result, 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

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.

				✓ EMAIL RECEIPT						
Payment Details										
DATE/TIME	INVOICE NUMBER		APPROVAL CODE	POSTAL CODE RESULT	AMOUNT	TYPE	LAST 4	CARD TYPE	STATUS	
07/23/2018 4:34 AM	qa-180723103416		WZPXFW	NotVerified	\$1.59	AUTH	6480	VISA	Captured	
Transaction Family										
DATE/TIME		AMOUNT	-	TRANS TYPE	LAST 4		CARD TYPE	TRANS STATUS		
07/23/2018 4:34 AM		\$1.59	AL	лтн	6480		VISA	Captured		
07/23/2018 4:34 AM		\$1.59		VOID	6480		ASIA	Undone		

Fig. 10 – the Payment Details page. The Transaction Family section shows the transaction history and details for each transaction. The only available action for this transaction is "Email Receipt". Transactions in the "Transaction Family" section can be clicked on for more details about each step in the transaction's history. The customer's general information, billing and/or shipping addresses can be edited and the customer can be invoiced by expanding the "Customer Details" section, as well.

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, and 13).







Fig. 11 – the "Confirm Refund" pop-up. Note that a partial refund can be issued by entering an amount less than the available refund amount listed.



Fig. 12 - "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	
L	
★ CANCEL ✓ EMAIL RECEIPT	

Fig. 13 – "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 14). 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 "Add Customer" button.

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e2e-310943933	Marte	Walsh	Jarrett32/0-e2e 310348539.com	(405) 275 2420	
	Labara	Wehner			
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Fig. 14 (*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 15). 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. 15 (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.

PAYMENTS TRA	NSACTIONS INVOICES SUBSCRIPTIONS	CUSTOMERS		,	DMIN V SETTINGS
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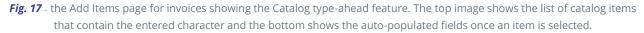
After reviewing the customer's information, the merchant can add items to the invoice either from the catalog or create a new item. Fields marked with an asterisk are required and will turn red if opened and left blank, as seen in Figure 16.

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Fig. 16 – 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, 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 17). 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.

Бρ	PRYMENTS STRATES TRANSACTIONS	INVOICES SUBSCRIPTION	ns customens				AME V STE	- m	EXP BATHENIS TRANSACTORS	INVOICES SUBSCRIPTIONS	CUSTOWCIS				лован у – чатен	eni -
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	e2e 29629210 Et tag = e2e-101959686 Facere =2e-568655011 III o of						\$2.00		# REMOVE ITEM			€ 400 TO CATH DS		0.25		



If a new Code/SKU or Description is entered, the "Add to Catalog" button becomes enabled, allowing the user to quickly add the item to the catalog (Figure 18) to be used again in future

created invoices. Or, if an existing catalog item is selected and then modified, the user has the option to save that change as a new catalog item.

Fig. 18 (right) - the Add Items page for invoices showing the "Add to Catalog" button enabled because the description changed.

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Please note that the "Quantity" field will only accept whole number values – decimal values are invalid.

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ETAIL KOWNENT							
Select Customer			Creato Hoview Customer		3 Adu nens		O review model and subscription
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If the "Recurring Payment" toggle is enabled, a new field expands with fields related to creating a subscription (Figure 19). For more information, please see the <u>Subscriptions</u> section.

Fig. 19 (left) – the Add Items section of the invoice creation workflow showing the Recurring Payment toggle enabled. Note that all fields are required to continue with the process of creating an invoice or subscription.

Once the fields are populated, the merchant can click on "Review Invoice" and also "4: Review Invoice" to preview the invoice.

On the review page (Figure 20), the merchant can review all the information entered in the creation process. When the merchant has completed their review, they can click on the "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.

Note: invoices associated with a subscription will have the same subscription number, with a number indicating which number invoice it is; for example, the first invoice generated for subscription number 181102023414-1yl will have invoice number 181102023414-1yl-1, and the second invoice generated for that subscription will have invoice number 181102023414-1yl-2.







PAYMENTS TRANSACT	IONS INVOICES SUBSCRIPTIONS	CUSTOMERS			ADMIN ~ SETTINGS ~
Recent invoices Search for invoices or select an in	voice to view details.				
TAKE A PAYMENT	CREATE INVOICE	& ADD CUSTOMER		Select a date range 01/04/2018 - 02/01/2018	Q
CREATED DATE	INVOICE NUMBER	CUSTOMER	INVOICE AMOUNT	PAYMENT TYPE	INVOICE STATUS
02/01/2018 2:52 PM	180201025048-44w	Whitney McClure	\$10.59	Credit Card	Pending
02/01/2018 2:50 PM	180201024654-ook	Whitney McClure	\$1,563.46	Credit Card	Pending
02/01/2018 2:46 PM	180201024348-zbx	Althea Pfannerstill	\$81.65	Credit Card	Pending
02/01/2018 2:35 PM	180201023415-1cd	Melvina Jones	\$20.97	Credit Card	Pending
02/01/2018 2:23 PM	180201022337-em9	Austyn Wintheiser	\$8.50	Credit Card	Cancelled
02/01/2018 12:39 PM	180201123817-vzo	Han Solo	\$5.00	Credit Card	Pending
02/01/2018 12:27 PM	180201122719-8jd	Han Solo	\$5.00	Credit Card	Pending
02/01/2018 12:16 PM	180201121549-ort	Han Solo	\$5.00	Credit Card	Pending
02/01/2018 12:08 PM	180201120807-z8i	Han Solo	\$5.00	Credit Card	Pending
02/01/2018 12:07 PM	180201120703-iu6	Han Solo	\$5.00	Credit Card	Cancelled
02/01/2018 10:28 AM	180201102645-nbv	Antonette Grimes	\$10.59	Credit Card	Pending
02/01/2018 10:26 AM	180201102213-6tz	Antonette Grimes	\$2,585.99	Credit Card	Pending
02/01/2018 10:21 AM	180201101859-mkx	Gussie Boyle	\$463.97	Credit Card	Pending
02/01/2018 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 payment form, 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".

D PAYMENTS		NS CUSTOMERS	_		_			ADMIN V	SETTING
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		CoderSHJ	Quantity	Unit Price	Tax Total	Item Total			
		41238DyM Mar facels Direct	1	823.00	82.50	827.50			
		238765425 (box 7slab)	3	\$10.00	\$3.00	\$33.00			
				Sub 1		855.00			
				Ghip Tex 1		\$5.00 \$5.50			
				Orand 7		055.50			
		Additional Notes							
		This is an additional note.							

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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	lact sector 1	535.00 52.00 507.40	1		Consider Enters Tax 1 An internet experiments	81.00 83.23	
		Sult Terral \$255.11			Unixed and Color Bar Bar Street B	642,00 63,00	12.82.61
		The Tank 17.52 The Tank 17.52 December 19.62				Sub Troat Shoring	9413.00 GL01

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".

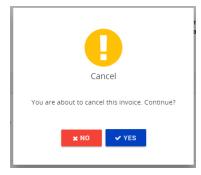
No matter the status of the invoice, each invoice will have a "Related Transactions" section at the bottom of the page (Figure 25). The transactions listed there are associated with that particular invoice; some transaction states are not visible at this time, but will be visible in a future release. For further information, the user must select the 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.

DATE/TIME INVOICE NUMBER APPROVAL CODE AMOUNT TYPE LAST 4 CARD TYPE STATUS									
	elated Transactions								^
	DATE/TIME	INVOICE NUMBER	APPROVAL CODE	AMOUNT	TYPE	LAST 4	CARD TYPE	STATUS	
03/06/2018 11:18 AM 180306111738-IIr MAAH4U \$22.00 AUTH 1111 🚾 Captured	03/06/2018 11:18 AM	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. Again, not all transactions will be visible at this time, but will be visible in a future release.

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.

Making Payments a Snap* for Developers | Dashboard User Guide

EVO Dashboard User Guide

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.

Download

Selecting the "Download" option downloads a copy of the invoice in its current state. This option is 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).

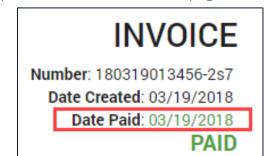
Fig. 28 (right) – a downloaded pending invoice. The red boxes show the "Pay Now" button and the payment web address link that can be copied and pasted into a web browser which both redirect to the Invoice Payment page.

Pay Now

Selecting the "Pay Now" option brings up a page identical to the invoice payment page from Figure 27, 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.





					\$716.08			
Dashboard Demo			1	NVOICE	Gadridde Hans Misty Schoen		Billing Postal Code	
pc8pcorg (23,455-453) 6001756/5 546-7004 Denve, 0040331			Number: 18031 Dete Create	12044515-y3m et: 03/12/2015 PENDING	Gard Number *			
BÌI To		Ship To			North *	* Year*	*	ON
Misty Schoon		Mitty Schoon					mencess	
					Version 1.0.0 20180216.1.0(20)	© B/O Taymonts int	ternational, EVO is a registered ISO and IVS	P of Deutsche Bank AG, Nov
Code/SKU Quar	etity	Unit Price	Tax Total	item Total				
liqixdj0 Soçal moliida kart tomport laborum. Officis n suscipit ut doloremque euro doloremque. Con								
		Sub Tr	ccal	\$707.88				
		Soft		\$9.00				
		Grand To	ccal	\$716.88				







Re-create

Clicking on the "Re-create" button brings the user to the Add Items page from the invoice creation workflow. The re-created invoice has the same information, except for tax rate, as the original invoice; this includes the same customer and customer information, billing address, shipping address, items, and notes. 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.

Subscriptions

Create a Subscription

Clicking on the Subscription heading brings the user to a "Recent Subscriptions" page, and from here, the merchant can select the blue "Create Subscription" button, which begins the subscription creation process (Figure 30). The process of creating a subscription is the same as the invoice creation process for the first two steps of selecting a customer and creating/reviewing the customer details. However, on the Add Items page, there is a "Recurring Payment" section opened with details for creating a subscription.

EPP PAYMENTS TRA	ISACTIONS INVOICES SUBSCRIPTIONS	CLISTOMERS		и	DMIN + SETTINGS +
	elect a subscription to view details.			נוז אול (אויר אויקט אוא - נואר אויז או	Q,
CREATED EATERANCE	MECTROCESPICE/CE	SUBCONTION NUMBER	SUBSCRIPTION EXPLIS	INTERIOL DITION DID BATE	
06/13/2018 10:24 AM	08/20/2018	qa-160813102415	Pending	Weakly 09/23/2318	
08/13/2018 10:19 AM	08/20/2018	180813101854 ap9	Fording	Weekly 08/20/2018	
06/13/2018 10:05 AM	38/20/2318	qie-180813180533	Cancelled	Weekly 09/23/2318	
06/13/2018 10:05 AM	08/20/2018	qa-160613100525	Pencing	Weckly 09/23/2018	
08/13/2018 8:54 AM	08/20/2018	180813385258 iv	Ferding	Weekly 08/20/2018	
08/13/2018 8:28 AM	11/23/2018	190813082816-gov	Percing	Quarterly 11/23/2018	
08/13/2018 8:08 AM	08/20/2018	180813080503 17u	Canceled	Weekly 08/20/2318	
MA 909 8102/140	08/20/2018	180813075955 KSa	Cancelled	Weekly 08/20/2318	
8/10/2018 1:46 PM	08/21/2018	150610014546 620	Fercing	Wecky 07/21/2020	
0/10/2018 1:45 PM	08/23/2018	180810014531 01v	Cancelled	Weekly 12/31/2998	
08/10/2018 1:45 PM	08/11/2018	150810014514-214	Canceled	Weaky 38/17/2318	
0/10/2010 1:30 PM	00/11/2010	100010013728 ot0	Percing	Weekly 00/17/2018	
8/10/2018 1:32 PM	08/11/2018	qa-180810013125	Feeding	Weekly 08/17/2018	
06/10/2018 1:32 PM	00/17/2018	qa-180810013125	Cancelled	Weekly 09/20/2018	



Merchants can select a date to begin invoicing on and then choose how often they'd like to automatically send the invoice to the subscription customer: weekly, every other week, monthly, quarterly, or yearly. Merchants can also select an expiration option to decide how the subscription will end: a specific number of occurrences, a specific end date, or merchants can choose for the subscription to not expire. Once created, merchants will need to cancel and recreate the subscription in order to change any of these details.

Ep Snap*

On the "Review Invoice and Subscription" page, merchants can see the invoice they've created, as well as the specific subscription details they have selected (Figure 31). Merchants can then click

WINGAT								
1 Datamer			🕑 Decelleries	and other		 Add Texts 	3 Technol	involve and Sci
	Dashboard Demo Kukhard Rendersong Kiti Bashar Dak Sola Ni Dark Desamar, K. 2021-1	750			NVOICE	Subscription Details Subscription Namber Begin Installing Cali Instruction Society Nachapterskien	1891 31 99854 (c) 44g 1 3, 2018 Decy Other Walk	
	081 To		Ship To					
	Rolencio Rodriguev 1334 Wrazik Wega Subia 218 Emmerichmouch 939	156187	Nolensko Note 1234 Wiscark 1486 218 Emmerichime	Veys				
	Code/SKJ	Quantity	Unit Price	Tax Total	item Total			
	c2c 600972 sta-07000037 hep-sh		185.80	\$2.50	98635			
			Sub Ship Tax	aing ocal	\$83.85 98.00 12.50			
			Grand	eral.	\$85.35			

"Create Invoice and Subscription" to finish creating the subscription.

Fig. 31 (left) – the "Review Subscription Details" page. Here, merchants can review their subscription details before proceeding with creating the subscription.

Upon successful creation of a subscription, a pop-up appears saying the subscription has been successfully created and asking the merchant if they'd like to add the customer's payment data now or later (Figure 32). If they would like to add payment details now, clicking "Yes, Add Now" takes the merchant to a page where they can review the subscription details and add payment data for the customer (Figure 33). If the merchant does not want to add payment details at that time, clicking on "No, Add Later" brings the merchant to the subscription

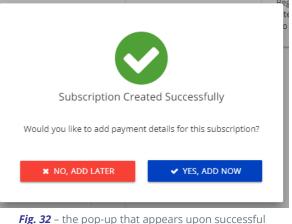


Fig. **32** – the pop-up that appears upon successful subscription creation.

details page. Please note that an invoice will only be generated against a subscription if there is payment data associated with that subscription .

PAYMENTS TRANSACTIONS IN	NOICES SUBSCRIPTIONS CUSTOMERS				admin ~ settings ~
Subscription Details			Recurring Payment Amount \$ 89.35		
Created Date 08/13/2018 10:54 AM	Subscription Number 180813103654-jxt	interval Option Every Other Week	Cardholder Name	Billing Postal Code	
Next Processing Date 08/13/2018	Subscription Status Pending	End Date 12/31/2098	Card Number *		8
			Month *	▼ Year* ▼ CVV	
				₩ SAVE	
			Version 2.0.0-201808081 (30)	© EVO Payments International. EVO is a registered ISO and MSP of Deutsche Bank AG, New Yo	rk, New York.

Fig. 33 – the page where merchants can enter the payment details for the created subscription. Fields marked with asterisks are required and will turn red upon being clicked in and out of.

IMPORTANT: The cardholder will **NOT** receive a receipt or a copy of the invoice unless the merchant manually elects to email the receipt from the transaction detail or sends a copy of the invoice manually.

ED Snap*

Recent Subscriptions

Clicking on the "Subscriptions" heading next to the EVO Payments logo brings the user to the Recent Subscriptions page, as seen in Figure 30, which has a clickable list of created subscriptions. Details about recent subscriptions, including date created, next processing date, subscription number, subscription status, interval option, and end date are included for each subscription in the list. If the specific subscription a merchant is looking for is not in the recent subscriptions list, merchants can search for a specific invoice using a created date range, exact subscription number, or subscription status.

Subscription Details Page

Clicking on a subscription from the list brings up the page to review the subscription details; the creation date, subscription number, interval option, next processing date, subscription status, and end date are all shown on this page, and there are expandable fields detailing the subscription customer's information, such as billing and shipping addresses, as well as a recent history section showing a clickable list of the invoices from the subscription's history (Figure 34).

IONS INVOICES SUBSCRIPTIONS CUSTOMERS				admin ~	SETTINGS 🗸
	X CANCEL	COPY LINK			
Subscription Details			^		
Created Date 08/09/2018 1:47 PM	Subscription Number michelle-sub-testActive		Interval Option Weekly		
Next Processing Date 08/16/2018	Subscription Status Active		End Date 08/23/2018		
Customer Details			~		
Recent History			~		

Fig. 34 – the "Subscription Details" page. All information entered about the subscription can be found here, as well as the subscription customer's information and recent subscription history.

Depending on the status of the subscription, different actions for the subscription will appear at the top of the page. For active and pending subscriptions, the four actions available for those subscriptions are "Cancel", "Cancel and Re-create", "Copy Link", and "Update Payment Details". For cancelled and completed subscriptions, the only action available is "Re-create".

Ep Snap*

Cancel

Selecting the "Cancel" option brings up the pop-up seen in Figure 35. Clicking "Yes" responds with a success message confirming the subscription was cancelled, and the Subscription Details will update the subscription status to "Cancelled".

Fig. 35 (right) – the Cancel Subscription button pop-up.



Cancel and Re-create

l f	•
Cancel & F	Re-Create
You are about to cancel this subscription and create a new subscr	iption. Cancelling this subscription cannot be undone. Continue?
× NO	✓ YES

Fig. 36 – the Cancel and Re-create Subscription button pop-up.

Selecting the "Cancel and Re-create" option brings up the pop-up seen in Figure 36. Selecting "Yes" responds with a success message confirming the subscription was cancelled and prompting the merchant to continue setting up a new subscription for this customer. All of the cancelled subscription's items, interval rate, and shipping details are copied into the "Add Items" section of the subscription creation

process - the "Begin Invoicing Date", "Expiration Option", and tax rate need to be re-entered by the merchant. The merchant can edit any and all of these details, including the customer to be invoiced, before reviewing and creating the subscription.

Note: the only way to update subscription details, such as interval option and expiration option, is to cancel the active subscription and re-create a new one with the desired details.

Copy Link

Selecting the "Copy Link" option copies the link to subscription so that a merchant can paste the copied link to make the subscription details and payment application accessible to the customer. Following that link brings the customer to the subscription details and payment application (as seen in Figure 33). All the fields on the subscription recurring payment page are editable except for the amount, and fields marked with an asterisk are required.





Update Payment Details

Selecting the "Update Payment Details" option brings the user to a page with the subscription details and a section to add payment information for the subscription. Payment details added here will be used for all future payments of the subscription unless updated again. A success message appears when the payment details have been successfully saved (Figure 37).

PAYMENTS INTERNATIONAL TRANSACTIONS	INVOICES SUBSCRIPTIONS CUSTOMERS				ADMIN 🗸	SETTINGS 🗸
Subscription Details created Date 08/13/2018 8:28 AM Net Processing Date 11/23/2018	Subscration Number 180813062816-gpv Subscration Salaus Pending	Interval Option Quarterly End Date 11/23/2018	Version 2.0.0-201808081 (30)	Success Payment Details have been saved. © EVO Payments International. EVO is a registered ISO and MSP of Deutsche Bank	. AG, New York, New Yo	rk.

Fig. **37** (*right*) – the Update Subscription Payment Details page showing the success message returned when the customer's payment details have been successfully updated.

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 38). 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. 38 (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.

EXP PAYMENTS TRUNSACTIONS IN	NOICES SUBSCRIPTIONS CUSTOMERS				ADMIN +	
		+ CREATE				
General	Information			^		
	First •		Last 4			
	rmal r		Phone	-		
	Customer ID					
Billing A	ddress			^		
	Stret		Apt-Unit			
	oly		5004	· .		
	Postol Code		United Otates	•		
Shipping	g Address			^		
		COPY BILLING ADDRESS				
	Direct		Apt-Unit			
	07/		State	•		
4	Rostel Carle		Carity Linzed States			

Ep Snap*

Customer Details Page

Clicking on the "Customers" heading next to the EVO Payments logo brings the user to the Recent Customers page (Figure 39). 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.

EXP PAYMENTS TRANSAC	TIONS INVOICES SUBSCRIPTIONS	CUSTOMERS			ADMIN + SETTINGS
Recent customers Create a new customer, search f	for a customer or select a customer to vi	ew details.			
E) TAKE A PAYMENT	CREATE INVOICE	4+ ADD CUSTOMER	(g) Search by	Email Address	Q
10	rirst	LAST	FMAIL	PHONE	
Ricky_Bins	Olaf	Stanton	Therese40@yahoo.com	(323) 406-8226	
	Aylin	WII			
Bernardo81	Rachelle	Schinner	Rosella.Strosin@hotmail.com	5463566264669	
Manuela.Cremin57	Veda	Haley	Juliet_BinsiByahoo.com	(192) 133-4483	
Wyman:Haley34	Gilberto	Osinski	Robyn17@gmail.com	202908672067814	
Ara_Mosciski86	Doug	Gutmann	Cleveland_McCullough@hotmail.com	1584894300809742	
Jaquan Willms	Nikita	Rath	Jackeline10@hotmail.com	(023) 571-982.6	
NikkLDouglas	Era	Walker	ila.Kohler@gmail.com	(460) 125-3026	

Fig. 39 – 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, invoices, or subscriptions (Figure 40).

PAYMENTS TRANSACTIONS INVOICES SUBSCRI											
HEIMARKA TRANSACTIONS INVOICES SUBSCRI	TIONS CUSTOMERS									ADMIN ~	SET
		CP EE		CUSTOMER							
General Informa	ion								^		
rist Nozh				cast Waelchi							
Enal				Phone							
LayneLt	ckman30@e2e-466873234.info			233712381							
e2e-155											
Billing Address									~		
Shipping Addres	5								~		
Optional Informa	tion								~		
Recent History									^		
Transactions	Invoices Subscriptions										
DATE/TIME	INVOICENUMBER	APPROVAL CODE	POSTAL CODE RESULT	AMOUNT	TYPE	LAST 4	CARD TYPE	STATUS			
08/14/2018 9:51 AM	qa-180814095122	AP2E88	NotVerified	\$323.00	AUTH	9615		Captured			
08/14/2018 3:50 AM	ga 180814095050		NotSet	\$1,695.00	RETURN	7272	JCR	Returned			
06/14/2018 3:50 AM	ga-180614095050	NKRBGV	NotVerified	\$1,695.00	AUTH	7272	JCH	Captured			

Fig. 40 – the Edit Customer page. In this figure, only the "General Information" and "Recent History" sections are not collapsed. By clicking the "Edit" button, a merchant can edit customer information in any of those fields. Note that in the "Recent History" section, there are three tabs for Transactions, Invoices, and Subscriptions.



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 or subscription for that specific customer.

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 41). Confirm Email
Confirm that you would like to send a receipt to

Fig. 41 (right) – the Email Receipt pop-up. This pop-up is accessed by clicking on the "Email Receipt" button on a Payment Details page.

Note: if a customer's information was updated after an invoice or subscription was created, a new invoice or subscription must be created – invoices and subscriptions do not automatically update to reflect updated customer information.

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 42).

PAYMENTS INTERNATIONAL T	TRANSACTIONS INVOICES	SUBSCRIPTIONS	CUSTOMERS			ADMIN V	SETTINGS 🗸
NAME		INDUSTRY		MERCHANT PROFILE ID	LOCATION	LAST UPDATED	
Dashboard Demo		Retail		DashboardTest	Retail	03/12/2018 4:14 PM	

Fig. 42 - 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 43). 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>.

PAYMENTS TRANSACTIONS INVOICES SUBSCRIPTIONS CUSTOMERS		ADMIN
	N CANCEL SAVE	
General Information	^	
Sector Nene Deshboard Deno	bekari sapas English	
Castanet farvise final locifiloc.org	Keisteine Friedland Deshboard/Test	
Customer Service Physics (422) 460-4450	Terminal 0 00/654/2160001	
nduatoy Factali	455	
Business Address Information		
Adhes Desi Tables	Address Cher 2 Scile 72001	
City/Town Denver	Steel France Celoredo -	
Perint Code 80202	Country United States	

Fig. **43** (*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 and subscriptions, as well as emailed receipts.

Note: if a merchant's business address information was updated after an invoice or subscription was created, a new invoice or subscription must be created – invoices and subscriptions 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.

E\$ Snap^{*}

Also, users are unable to modify roles' permissions that are higher than or equal to 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 44). 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, adding a new catalog item, and deleting multiple catalog items.

tolog catalog feature allows users to additems in a cent	naited niace making these here: available i	n the involve creation	970r#55	
R CELATE INVOICE +KDD CATAL			Search by Secreption	Q
2017/310	UNIT PART	TAX PAR	DESCRIPTION	DATE UPDATED
0	\$3.00	7.3%	Description, description, description.	05/25/2018 2.06 PM
23	\$1.20		tez	05/25/2018 1.56 PM
121	\$45.00		bed.	05/25/2018 14/2 PM
1675309	\$18.00	2.%	Such description, much waw.	05/25/2018 1.00 PM
120-691475081- koybo	\$45.55	2.09 %	e2o-609197992 in et esse malestas lure distinctio. De are voluptatibus occaseat explic	05/22/2018 7.35 4M
0+501219811-ces2	\$71.01	0.07%	s7e-52177209 Foi numpers operiors macine opelat qui seperinte et utiquice	05/25/2018/3-51 PM
2e 501239831 new	\$23.03	0.07%	e2e 501275039 Est numquam experiores maxime repeilat qui asperiores et voluptare	05/21/2018 3:53 PM
20-60389917-080	\$20.84	9.81 %	eze-beteretoris ut ventato eos fugas. Autom minima ducimus qua hicivaluptas qua	05/27/2018 3:10 PM
0# 742034947 cm	\$94.03	10.45 %	e3e 742153319 Dolor est commod ut sint. Ut aspenatur eos praesentium molestiae a .	05/21/2018 3:09 PM
2e 414200881 Keybo	\$7.00	0%	e2e 414039636 Elus sti est rem placeat. Et radione esperiores sint voluptatibus. Soluta	05/21/2018 3:09 PM
20-415952493-paza	\$7.00	0.5	eze-414039366 trus at est remplaceat. Et ranone asperieres seit veloptations toluta	05/27/2018 3 09 PM
On-MARINONI-MERMI	\$15.02	10.55 %	e2e-999632335 () are architecte delore mult. It also venam debrem at goarged et	OVOLORIE H CO PM
0x 572437501 bite	\$12.00	15	e2e 573464216 Eos in tempora. Deloremque et allas laboriosam. Velvatatem incidunt L.	05/21/2018 3 C9 PM

Fig. 44 - the Catalog page. The items on this page are listed by newest date updated by default.

Selecting "Create 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 45).

INVOICES SUBSCRIPTIONS	CUSTOMERS				ADMIN 🗸	SETTINGS ~
		+ CREATE				
Code/SKU *	0/20	\$ Unit Price *	Tax Rate	%		
Description *						
				0 / 250		





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 46). 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.

PAYMENTS INTERNATIONAL	TRANSACTIONS	INVOICES SUBSCRIPTIONS CUS	TOMERS				ADMIN 🗸	SETTINGS 🗸
				Ø EDIT				
		Code/SKU 0700900461	Unit Price \$ 13.00	Tax Rate	%	Date Updated 05/29/2018 8:53 AM		
		Description Blue Police Box, bigger on the outside	0 / 20					
						38 / 250		

Fig. 46 - the Catalog Item Details page, with the "Date Updated" section boxed in red.

Selecting "Multi-Delete" brings up a column of checkboxes, with one next to each catalog item. Checking one or more of the boxes changes the "Multi-Delete" button into a red "Delete" button that enables the user to delete multiple catalog items at once (Figure 47 and 48). To remove the column of checkboxes, uncheck all the boxes and click on the blue "Multi-Delete" button again, or navigate away from the list and back to it again .

	MENTS ATIONAL TRANSACTIONS	INVOICES SUBSCRIPTIONS C	USTOMERS			ADMIN ~	SETTINGS 🗸
Catalog The catalog	feature allows users to add	l items in a centralized place making t	these items available in the invoice crea	tion process.			
₽ ся	REATE INVOICE	+ ADD CATALOG ITEM	8 delete		Search by Description		٩
	CODE/SKU		UNIT PRICE	TAX RATE	DESCRIPTION	DATE UPDATED	
	0700900461		\$13.00		Blue Police Box, bigger on the outside	05/29/2018 8:53 AM	
	73		\$3.00	7.3 %	Description, description.	05/25/2018 2:06 PM	
	123		\$1.20		test	05/25/2018 1:56 PM	
	123		\$45.00		test	05/25/2018 1:47 PM	
	8675309		\$18.00	2 %	Such description, much wow.	05/25/2018 1:00 PM	



CODE/SRU	UNIT PRICE	TAX RATE	DESCRIPTION	
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e2e-171552210- shirt				m nihil ea
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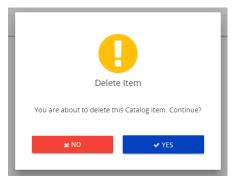




Clicking on a specific catalog item from the list brings the user to a page with details about that item (Figure 49). From there, the merchant can edit the catalog item information, such as code/SKU, unit price, tax rate, and item description. Editing and saving any of these fields will update the "Date Updated" field for that catalog item.

PAYMENTS TRANSACTIONS IN	OICES SUBSCRIPTIONS CUSTOMERS				admin ~	SETTINGS ~
		C# EDIT	DELETE COPY			
	Code/SKU 0700900461	Unit Price \$ 13.00	Tax Rate	Date Updated 9/4/18, 2:37 PM		
	Description Blue Police Box, smaller on the outside					
				39 / 250		

Fig. **49** - 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 50) 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 51). 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	INVOICES	SUBSCRIPTIONS	CUSTOMERS				ADMIN 🗸	SETTINGS 🗸
					+ CREATE				
		Code/SKU * 07009004	51	10/20	Unit Price * \$ 13.00	Tax Rate	%		
		Description * Blue Police	e Box, <mark>smaller on the</mark> o				11		
							39 / 250		

Fig. 51 - 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 52). 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.

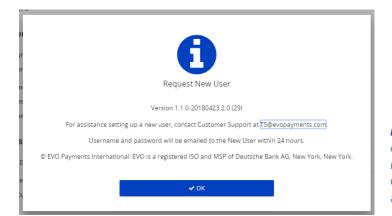


Fig. 52 (left) – the "Request New User" pop-up, which explains what steps need to be taken in order to set up a new Dashboard user account. Merchants must contact Customer Support in order to set up a Dashboard user account.

Permissions

Due to the Dashboard workflow, some permissions are dependent on others. For example, the process of creating an invoice or subscription and the ability to edit a customer are interrelated. Thus, in the permissions page for a user (Figure 53), 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 54 and 55). Permissions that are interdependent on others will present a warning pop-up when changes are attempted by the user.

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	Chice Indica Carolinates	
Fig F2 (wight) the permissions for a Marchant	Bowerland in works Practice involue	
Fig. 53 (right) – the permissions for a Merchant	Admin Module~	-0
Admin showing the default permissions	Bennie	
associated with that role. Note, these permissions	Nd: Kulov	
	Lát Extelep	
are only editable by a user with a higher role – not	Retoriv Crute	
by the user themselves. Also, merchants will be	Edit Dolore	
	Settings Module-	-0
unable to see roles higher than their own – thus, if	Ny Assort- Ni	
the user was only a Merchant User, the only	Extpante-	8-
	Subscriptions Module~	-0
option they would see in the top left menu is	Natoripsis bitali~	
"Merchant User".	Color American's Santh Ballan Fayners Santh Eann Shakeryann	10

EVO Dashboard User Guide		۩ Snap*
	Customers Module ~	
	Customer Detail ~	
	Create Customer Edit Customer	
Permissions	Invoices Module ~	
Disabling this module will force the Create Invoice, Create Subscription, and Update Payment Details permissions to be disabled.	Invoice Detail ~ Create Invoice Cancel Invoice	•
★ CANCEL ✓ OK	Download Invoice Process Invoice	

Fig. 54 (left) and Fig. 55 (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.

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.

Note: Depending on the user's permissions, a fourth Configuration option may be available in the dropdown menu.

My Account

Clicking on My Account from the Settings drop-down menu brings the user to a page with their account information (Figure 56). General information, such as preferred time zone and default language can be edited.

ACTIONS INVOICES SUBSCRIPTIONS CUSTOMERS				ADMIN 🗸	SETTINGS 🗸
	C EDIT				
General Information			^		
Preferred Time Zone America/Denver	•	Default Language English	•		
Assigned Role Master Merchant Admin					
Change Password			~		
Update Security Answers			~		

Fig. 56 – 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 57. This pop-up gives information about EVO Dashboard, such as the version number and the

customer support email address and/or phone number (depending on the configuration settings).

Fig. **57** (*right*) – the About pop-up for Snap* Dashboard containing the versioning information and customer support contact email address.



Ep Snap*

Session Expiration

Note: The Configuration option in the Settings drop-down menu is only available to users with the Master Merchant Admin role.

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 58). 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 59). In order to continue using Dashboard, the merchant must sign back in.

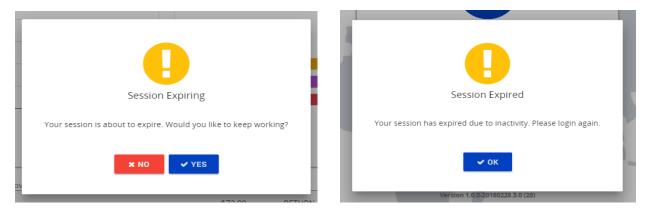


Fig. 58 (left) and Fig. 59 (right) – the pop-ups that appear upon warning of session expiration and session expiration.

Configuration

The Configuration page contains information that is used throughout Dashboard to identify the merchant. The editable fields on this page, such as support email, support phone, and copyright disclaimer, are displayed in the About pop-up for all merchant users (Figure 60), error messages where the user is directed to contact support; the disclaimer can also be found on the login screen. Merchants can choose to display their contact email, phone number, or both using the buttons. All the fields are required and will turn red if clicked on and left blank.

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Fig. 60 (left) – The Configuration page where information such as support email, support phone number, and copyright disclaimer can all be edited. The information entered here will be displayed in the About pop-up, error messages, and on the login screen for all merchant users.

Ep Snap*

Channel Branding

Channel branding allows Dashboard to be branded individually for different EVO channels. Each channel's branding is customizable, allowing all EVO global regions to match their own individual, unique style guides and standards. Customizable theme attributes are limited to logo, font, primary and secondary colors, technical support email and phone number, and copyright disclaimer. Support contact information and copyright disclaimer are customizable in the <u>Configuration section</u>, as mentioned above.

IMPORTANT: Once these theme attributes are selected, they can only be changed by contacting Customer Support at <u>TS@evopayments.com</u>.

Creating a Theme

In order to create a customized theme for each channel, a merchant will first contact Customer Support at <u>TS@evopayments.com</u>. Here, they will select their logo, font, and primary and secondary colors to be displayed within the application (Figure 61 and 62).

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Fig. 61 (left) and Fig. 62 (right) – Examples of channel branded Dashboard pages – in these instances, the channel branding has been formatted to match EVO Snap*. Note that the header color (primary color) and the buttons color (secondary) have been changed, as well as the color for warning buttons (seen in Figure 64). Also, note that the font style has been changed.

The <u>Configuration page</u>, as outlined above, will manage the contact information and copyright disclaimer as stated. Please note again that this page will only be accessible by a Master Merchant Admin user.

Reference Information

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