



## PayFabric Partner Portal Guide

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**PayFabric**<sup>®</sup>

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# Table of Contents

Copyright Information.....	2
Introduction .....	5
Account Management .....	5
Account Sign-up.....	5
Account Login .....	5
Password Reset .....	6
PayFabric Partner.....	6
Partner Service Access.....	6
Add Merchant.....	7
Edit Merchant .....	18
Merchant Impersonation.....	19
Reports .....	19
Configurations.....	19
New Configuration.....	20
Configure Web Access Permissions .....	20
Configure PayFabric .....	20
Publish Configuration.....	21
Copy Configuration .....	21
Edit Configuration .....	21
Delete Configuration .....	21
Invite Merchant.....	22
Resend Invite .....	22
Applicants .....	22
Outbound Email.....	23
Email Templates .....	23
API Key.....	24
Merchant Boarding Integration Options .....	24
Partner Created Merchant Application Page .....	24
Partner uses the PayFabric On-line application.....	24
EVO Now Hosted Online application.....	25
Boarding Process Steps.....	25

Partner Created Merchant Application Page ..... 25

Partner uses PayFabric On-line application ..... 26

Testing the Boarding Process..... 27

Documentation & Support ..... 28

    PayFabric Partner API Guide ..... 28

    Support ..... 28

    For more assistance on using the PayFabric APIs, reach out to your PayFabric Solution Engineer.... 28

Sample Page Images ..... 29

    PayFabric Online Application..... 29

    Application Completion page ..... 30

# Introduction

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

PayFabric offers our integrated partners a portal to manage their merchants boarded to PayFabric service.

This document covers how to setup and use PayFabric Partner Portal's features and functionalities.

## Account Management

### Account Sign-up

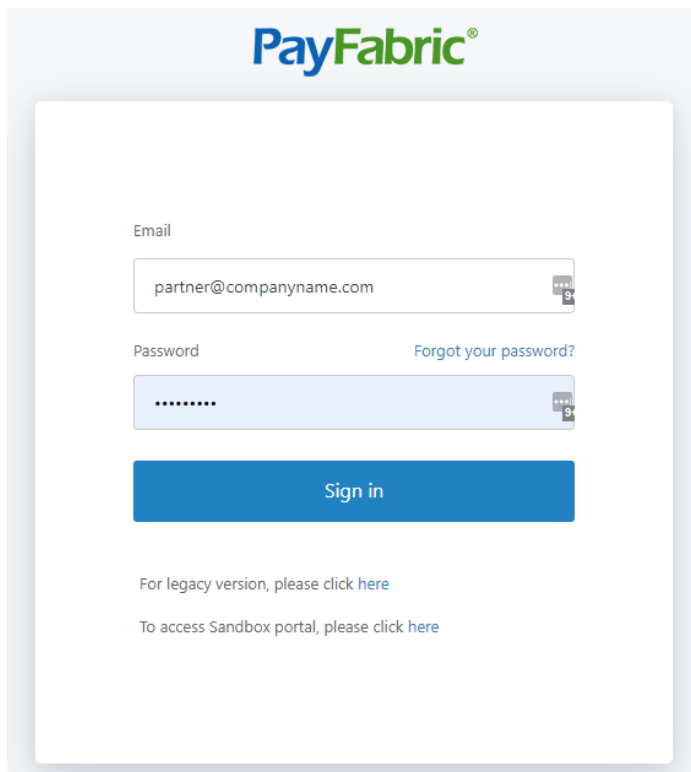
PayFabric Support can assist with create a PayFabric account with partner portal access. All the partner needs to do is activate their PayFabric account & set their preferred password.

### Account Login

Once the partner account has been provisioned by PayFabric Support, partner can access their PayFabric partner account via the URLs below.

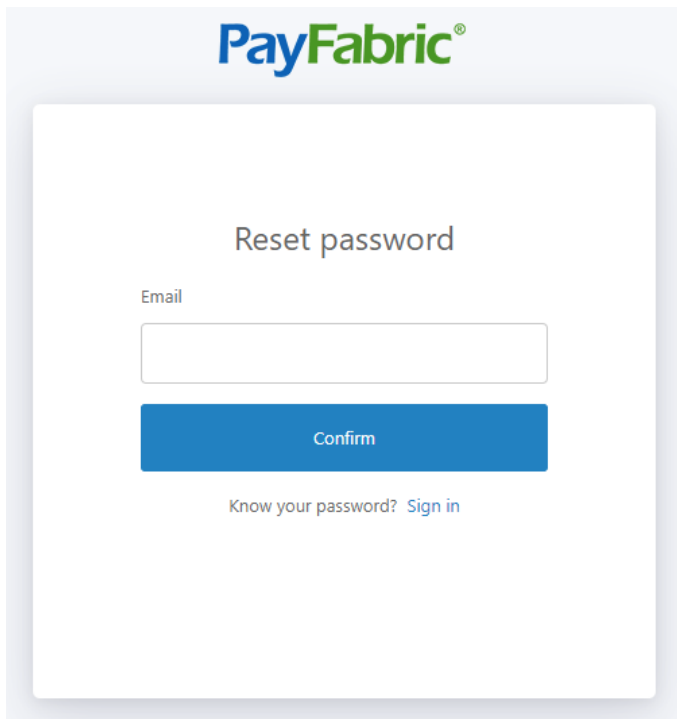
**Sandbox:** <https://sandbox.payfabric.com/portal>

**Production:** <https://www.payfabric.com/portal>

The image shows a screenshot of the PayFabric Partner Portal login interface. At the top, the PayFabric logo is displayed in blue and green. Below the logo, there is a white rectangular box containing the login form. The form has two input fields: 'Email' with the placeholder text 'partner@companyname.com' and 'Password' with masked characters '.....'. To the right of the password field is a link that says 'Forgot your password?'. Below the input fields is a blue button labeled 'Sign in'. At the bottom of the form, there are two links: 'For legacy version, please click here' and 'To access Sandbox portal, please click here'.

## Password Reset

Partner can request to reset password for an existing PayFabric account by clicking on the 'Forgot your password' link on the portal main page under corresponding sandbox or production environment:



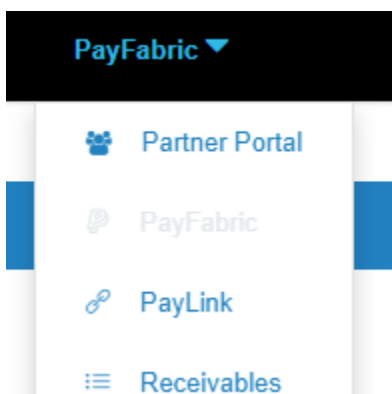
The image shows a screenshot of the PayFabric 'Reset password' form. At the top is the PayFabric logo. Below it, the title 'Reset password' is centered. Under the title, the word 'Email' is followed by a text input field. Below the input field is a blue button labeled 'Confirm'. At the bottom of the form, there is a link that says 'Know your password? Sign in'.

## PayFabric Partner

### Partner Service Access

By default, upon login to PayFabric portal, a partner user will be able to access the Partner portal .

To navigate back Partner portal after accessing other PayFabric services, open the upper-left menu in the PayFabric portal and select the **Partner Portal** option in the drop-down menu.



## Merchants

Partner user can view and manage all their PayFabric merchants from **Merchants** page.

Applicants

Merchants

Configurations

Outbound Email

Email Templates

API Key

2 Merchant(s)

Search Merchant

Add Merchant

Organization	Email	Status	PayFabric	PayLink	Receivables	Created Date	Modified Date	Activated Date	
ABC Company	john.doe@abccompany.com	Completed	Active	Inactive	Inactive	1/22/2021	1/22/2021	1/22/2021	
XYZ, Inc.	jane.smith@xyzinc.com	Completed	Active	Inactive	Active	10/16/2020	10/16/2020	10/16/2020	

### Add Merchant

Partner user can add new PayFabric account for merchant using the **Add Merchant** button.

#### Merchant Information

Populate basic information associated with the merchant's organization.

### Add New Merchant

#### Merchant Information

Organization \*

EVO Merchant ID \*

Snap MerchantID \*

EVOACH MerchantID \*

Address \*

Country

Street Address

City

State/Province

Zip/Postal Code

Business Phone

[Cancel](#)
[Next](#)

Field(s)	Description
Organization	The name of the business or company that will be using PayFabric service.
EVO Merchant ID	This is the Merchant ID provided by EVO Merchant Support when the merchant account is provisioned.
Snap Merchant ID	<p>This is the Snap's Merchant Profile ID provided by EVO Merchant Support when the merchant account is provisioned.</p> <p><b>NOTE:</b> Either Snap Merchant ID or EVO ACH Merchant ID must be populated. Both can be populated if merchant intends to accept both credit card and ACH.</p>
EVO ACH Merchant ID	<p>This is the EVO ACH's Merchant ID provided by EVO Merchant Support when the merchant account is provisioned.</p> <p><b>NOTE:</b> Either Snap Merchant ID or EVO ACH Merchant ID must be populated. Both can be populated if merchant intends to accept both credit card and ACH.</p>
Address	The primary address and phone information of the business or company that will be using PayFabric service.

### Primary Contact Info

Populate primary contact information associated with the merchant's organization.

#### Add New Merchant

— — — —

#### Primary Contact Info

First Name *	<input type="text"/>
Last Name *	<input type="text"/>
Phone	<input type="text"/>
Email *	<input type="text"/>



Field(s)	Description
<b>First Name</b>	The first name of the primary contact of the business or company that will be using PayFabric service.
<b>Last Name</b>	The last name of the primary contact of the business or company that will be using PayFabric service.
<b>Phone</b>	The phone number of the primary contact of the business or company that will be using PayFabric service.
<b>Email</b>	The phone number of the primary contact of the business or company that will be using PayFabric service.

### Service Selection

Select the service(s) subscribe by the merchant. By default, PayFabric service is selected as the minimum required service.

**Configure Services**

**Service Selection**

Configuration \*

Manual Configuration

---

Boarding Setting \*

BoardingSettings

---

Pricing Tier \*

--- Choose a Pricing Tier ---

Default
**PayFabric**

Take payments and connect data across all your platforms, websites and applications using a centralized hosted solution.

Add-On
**PayLink**

One-click payment hyperlinks that allow customers to view their outstanding invoices and submit payment information without logging into an account.

Add

Add-On
**Receivables**

Automate your accounts receivable process by allowing customers to pay their outstanding invoices online.

Add

Field(s)	Description
<b>Configuration</b>	<p>Partner can setup a preset configuration for PayFabric service for a corresponding application/product/software.</p> <p>This will help save partner time to configure PayFabric individually for each onboarded merchant.</p> <p>See more details under <a href="#">Configurations</a>.</p>
<b>Boarding Setting</b>	<p>All PayFabric partner accounts will be automatically setup with a default boarding setting template.</p> <p>Partner who would like to leverage auto-boarding functionality from PayFabric to provide a seamless onboarding process with their application will be given an option to customize their customer's onboarding experience via the boarding setting template.</p>
<b>Pricing Tier</b>	<p>This pricing tier option is only available to integrated Nodus' software merchants. Choose the pricing tier that best fit the merchant's processing and storage volume.</p> <p>More details on PayFabric's tier pricing options are <a href="#">here</a>.</p>

### Configure Service(s)

For each subscribed service from the merchant, partner can configure settings to show/hide features or pages from merchant. This is designed with the main intention that the partner will assist and perform the necessary setup and configuration for service settings on behalf of the merchant.

### Configure PayFabric Service's Settings

Field(s)	Description
<b>Sitewide Settings</b>	
<b>Manage Organization</b>	<p>Manage Organization provides merchant the ability to manage their organization attributes such as Manage Users, Setup User Roles and Manage Billing Information.</p> <p>Toggle <b>Show/Hide</b> this option to display or hide it merchant from PayFabric service.</p>
<b>Add Organization</b>	<p>Add Organization provides merchant the ability to add new organization &amp; corresponding service(s) for PayFabric.</p> <p>Toggle <b>Show/Hide</b> this option to display or hide it from merchant from PayFabric service.</p>
<b>Displayed Records</b>	<p>All report grids on PayFabric are defaulted to 15 records as part of result per page. Partner can change this number for specific merchant based on their needs using the dropdown list.</p>
<b>Overview Widgets</b>	
<b>Top 5 Devices</b>	<p>This is a widget from PayFabric Overview page that provides merchant the top 5 used devices from week to date.</p> <p>Week starts on Sunday so viewing the report on Wednesday will give user the last 3-days dataset.</p> <p>Toggle <b>Show/Hide</b> this widget on Overview page to display or hide it from merchant from PayFabric service.</p>
<b>Top 5 Gateways</b>	<p>This is a widget from PayFabric Overview page that provides the top 5 used gateways from week to date. Week starts on Sunday, so viewing the chart on Wednesday will give user the last 3-days dataset.</p>

<b>Failed Transactions</b>	<p>This is a widget from PayFabric Overview page that provides the list of last 10 transactions that failed [regardless of month/date] for the filtered currency types.</p> <p>Toggle <b>Show/Hide</b> this widget on Overview page to display or hide it from merchant from PayFabric service.</p>
<b>Web Pages</b>	
<b>Process Batch Transactions</b>	<p>PayFabric's Process Batch Transaction page allows user to process a group of payments based on Batch Number. Transactions can be grouped into a batch and save for later processing using 'Batch Number' field from 'Process a Transaction' virtual terminal page.</p> <p>Toggle <b>Show/Hide</b> to display or hide this page from merchant from PayFabric service.</p>
<b>Pay Later Transactions</b>	<p>PayFabric's Pay Later Transactions page allows users to manage transactions that were marked for processing at a later date. Transactions can be saved for later processing using 'Pay Later' field from 'Process a Transaction' virtual terminal page.</p> <p>Toggle <b>Show/Hide</b> to display or hide this page from merchant from PayFabric service.</p>
<b>Transaction Summary</b>	<p>PayFabric's Transaction Summary page generates summary report based on a date range, payment method, entry mode, card type, gateway, and/or devices.</p> <p>Toggle <b>Show/Hide</b> to display or hide this page from merchant from PayFabric service.</p>
<b>Service Usage</b>	<p>PayFabric's Service Usage page generates monthly usage report for merchant.</p> <p>Toggle <b>Show/Hide</b> to display or hide this page from merchant from PayFabric service.</p>

<b>Custom Reports</b>	<p>PayFabric's Service Custom Reports page provides merchant an option to create their own custom report(s) for PayFabric's transactions.</p> <p>Toggle <b>Show/Hide</b> to display or hide this page from merchant from PayFabric service.</p>
<b>Addresses</b>	<p>PayFabric's Addresses page provides merchant a list of customer addresses associated with their payment information.</p> <p>Toggle <b>Show/Hide</b> to display or hide this page from merchant from PayFabric service.</p>
<b>Gateway Profile</b>	<p>Payment gateway account is needed to process transactions with PayFabric. PayFabric's Gateway Account Profiles page provides merchant the ability to setup &amp; configure their payment gateway account information on PayFabric.</p> <p>Toggle <b>Show/Hide</b> to display or hide this page from merchant from PayFabric service.</p>
<b>Transaction Settings</b>	<p>PayFabric's Transaction Settings page provides merchant the ability to configure transaction-related settings.</p> <p>Toggle <b>Show/Hide</b> to display or hide this page from merchant from PayFabric service.</p>
<b>Devices</b>	<p>PayFabric's Devices page provides merchant the ability to setup application/device that utilizes PayFabric in the background for payment processing needs. Each application requires a device ID and device password for authentication with PayFabric APIs.</p> <p>Toggle <b>Show/Hide</b> to display or hide this page from merchant from PayFabric service.</p>
<b>Themes</b>	<p>Different application may have different needs of utilizing PayFabric's hosted payment page. A <b>Theme</b> can be assigned to a device to customize the layout and format of the PayFabric's hosted payment page.</p> <p>Toggle <b>Show/Hide</b> to display or hide this page from merchant from PayFabric service.</p>





<b>Tracing</b>	<p>PayFabric's Tracing page provides merchant the ability to enable tracing on PayFabric. A transaction trace gives a detailed snapshot of a single transaction &amp; its processing dataflow for troubleshooting purpose.</p> <p>Toggle <b>Show/Hide</b> to display or hide this page from merchant from PayFabric service.</p>
<b>Default Gateways</b>	<p>With modern design option for Virtual Terminal, user can set a default gateway account profile for both credit card and eCheck processing options for each currency type. PayFabric will use the preset gateway details to process corresponding transaction.</p> <p>Toggle <b>Show/Hide</b> to display or hide this page from merchant from PayFabric service.</p>
<b>Email Templates</b>	<p>User can manage email receipt templates and corresponding content for each template based on transaction type.</p> <p>Toggle <b>Show/Hide</b> to display or hide this page from merchant from PayFabric service.</p>
<b>Payment Terminal</b>	<p>PayFabric's Payment Terminal page provides merchant the ability to setup their EMV devices &amp; corresponding transaction settings.</p> <p>Toggle <b>Show/Hide</b> to display or hide this page from merchant from PayFabric service.</p>
<b>P2PE</b>	<p>PayFabric integrates with Bluefin Decryptpx to allow end user to pass credit card number to PayFabric's hosted page using point-to-point encryption (P2PE) device. This page provides merchant the ability to configure Bluefin's Decryptpx settings for P2PE support.</p> <p>Toggle <b>Show/Hide</b> to display or hide this page from merchant from PayFabric service.</p>

<b>Discretionary Data</b>	<p>Discretionary Data page allows merchant to setup additional data field(s) they need to populate during transaction processing.</p> <p>Toggle <b>Show/Hide</b> to display or hide this page from merchant from PayFabric service.</p>
<b>Products</b>	<p>Products page allows merchant to import items or inventory products to PayFabric for easy data entry through PayFabric's virtual terminal.</p> <p>Toggle <b>Show/Hide</b> to display or hide this page from merchant from PayFabric service.</p>
<b>DPA Configuration</b>	<p>This page allows merchant to configure integration to SAP's Digital Payments Add-on with PayFabric.</p> <p>Toggle <b>Show/Hide</b> to display or hide this page from merchant from PayFabric service.</p>
<b>PayPal Configuration</b>	<p>This page allows merchant to setup and configure PayPal as an alternative payment method to PayFabric.</p> <p>Toggle <b>Show/Hide</b> to display or hide this page from merchant from PayFabric service.</p>
<b>Apple Pay Configuration</b>	<p>This page allows merchant to setup and configure Apple Pay as an alternative payment method to PayFabric.</p> <p>Toggle <b>Show/Hide</b> to display or hide this page from merchant from PayFabric service.</p>
<b>Google Pay Configuration</b>	<p>This page allows merchant to setup and configure Google Pay as an alternative payment method to PayFabric.</p> <p>Toggle <b>Show/Hide</b> to display or hide this page from merchant from PayFabric service.</p>




## PayFabric

Toggle to show or hide each feature or page.






















### Sitewide Settings

Manage Organization		<input checked="" type="radio"/> Hide
Add Organization		<input checked="" type="radio"/> Hide
Displayed Records		15 

### Overview Widgets

Top 5 Devices		<input checked="" type="radio"/> Hide
Top 5 Gateways		<input checked="" type="radio"/> Hide
Failed Transactions		<input checked="" type="radio"/> Hide

### Web Pages

<i>Virtual Terminal</i>		
Process Batch Transactions		<input checked="" type="radio"/> Hide
Pay Later Transactions		<input checked="" type="radio"/> Hide
<i>Reports</i>		
Transaction Summary		<input checked="" type="radio"/> Hide
Service Usage		<input checked="" type="radio"/> Hide
Custom Reports		<input checked="" type="radio"/> Hide
<i>Customers</i>		
Addresses		<input checked="" type="radio"/> Hide
<i>Settings</i>		
Gateway Profile		<input checked="" type="radio"/> Hide
Transaction Settings		<input checked="" type="radio"/> Hide
Devices		<input checked="" type="radio"/> Hide
Themes		<input checked="" type="radio"/> Hide
Tracing		<input checked="" type="radio"/> Hide
Default Gateways		<input checked="" type="radio"/> Hide
Email Templates		<input checked="" type="radio"/> Hide
Payment Terminal		<input checked="" type="radio"/> Hide
P2PE		<input checked="" type="radio"/> Hide
Discretionary Data		<input checked="" type="radio"/> Hide
Products		<input checked="" type="radio"/> Hide
DPA Configuration		<input checked="" type="radio"/> Hide
PayPal Configuration		<input checked="" type="radio"/> Hide
ApplePay Configuration		<input checked="" type="radio"/> Hide
Google Pay Configuration		<input checked="" type="radio"/> Hide



## Configure PayLink Service's Settings

Field(s)	Description
<b>Failed Integrated PayLinks</b>	<p>This is a widget from PayLink Overview page that provides the list of payment links that failed integration.</p> <p>Toggle <b>Show/Hide</b> to display or hide this widget on Overview page from merchant from PayLink service.</p>
<b>Web Pages</b>	
<b>PayFabric Device</b>	<p>This page allows user to set PayFabric device to provide proper authentication for PayLink to consume PayFabric service in the background for transaction processing.</p> <p>Toggle <b>Show/Hide</b> to display or hide this page from merchant from PayLink service.</p>
<b>Configure ERP Connection</b>	<p>PayLink is able to send payment information back to Microsoft Dynamics GP, Microsoft Dynamics SL and Salespad after the payment is processed. This page allows user to configure connection to other systems for payment integration.</p> <p>Toggle <b>Show/Hide</b> to display or hide this page from merchant from PayLink service.</p>
<b>Configure Default Gateways</b>	<p>Default credit card/eCheck gateway profile can be set against each currency type and the associated gateway information will be used during transaction processing.</p> <p>Toggle <b>Show/Hide</b> to display or hide this page from merchant from PayLink service.</p>
<b>Email Templates</b>	<p>The user is able to customize all of the notification templates that are distributed, either by email or SMS. Merchant is provided with a default set of templates which they can copy and make changes to, or start from scratch.</p> <p>Toggle <b>Show/Hide</b> to display or hide this page from merchant from PayLink service.</p>

## PayLink

Toggle to show or hide each feature or page.

### Overview Widgets

Failed Integrated PayLinks

☐ Hide

### Web Pages

Settings

PayFabric Device

☐ Hide

Configure ERP Connection

☐ Hide

Configure Default Gateways

☐ Hide

Email Templates

☐ Hide


## Configure Receivables Service's Settings

In order to setup Receivables service on PayFabric, merchant needs to specify a prefer site name. This site name will be used in the URL for the Receivables' customer portal.

## Receivables

Please create a name for the PayFabric Receivables site.

Site Name \*

 This name will be used in the URL for the customer portal. Example:  
`https://www.PayFabric.com/CustomerPortal/[SiteName]`.

## PayFabric Account Provision Completion Confirmation

Once all the service configuration have been setup, partner will receive a confirmation page that the PayFabric account provision process is completed.



## Confirmed

**Shaun Sharples Ltd. has been created successfully.**

Close

View

## Edit Merchant

Click on the merchant's organization name from **Merchants** page to view merchant's account information.

Click 'Edit Merchant' to make necessary changes against the merchant's account. Click 'Save' once all edits have been made to commit the changes.

## Shaun Sharples Ltd.

**Merchant**

Contact

Services

### Merchant Information

Organization Shaun Sharples Ltd.


Merchant ID 134384888

Address 123 Pine St  
Tustin, CA 12345  
United States  
9094824701

Close

Edit Merchant

## Merchant Impersonation

Click on the  icon next to merchant's organization name from **Merchants** page to access merchant's PayFabric service on behalf of the merchant.

**Merchants**

Configurations

1 Merchant(s)

**Organization****Email**

Shaun Sharples Ltd.



shaun.sharples1@nodus.com

Partner will be able to view and make any changes on behalf of merchant against their subscribed service(s). The only functionality that partner user will NOT be able to do is process a transaction on behalf of the merchant.

## Reports

Partner is able to select the active merchants from the list and clicks on Report to view their past service usage reports for their subscribed service(s).

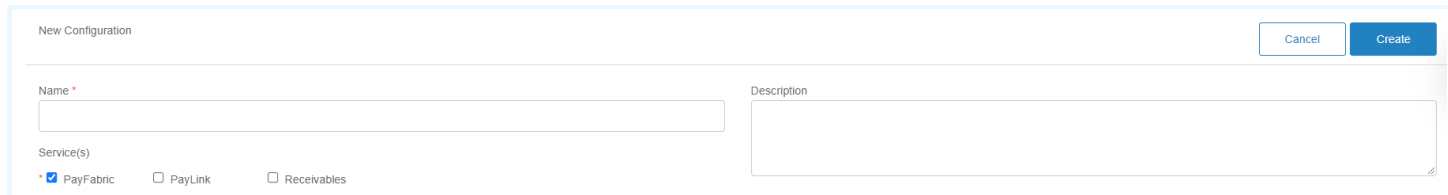
## Configurations

Partner can setup a preset configuration for PayFabric service for a corresponding application/product/software. The preset configuration can be assigned during [invite merchant](#) process so upon PayFabric account provision, the preset settings are applied.

Once the account is created, the merchant does not need to do any additional works in setting up their PayFabric account in order to start using the partner's product with PayFabric.

## New Configuration

Use the **New Configuration** button to setup a new configuration package. Specify the name, description and choose the preferred service(s) to be associated with the configuration package, then click **Create** button.

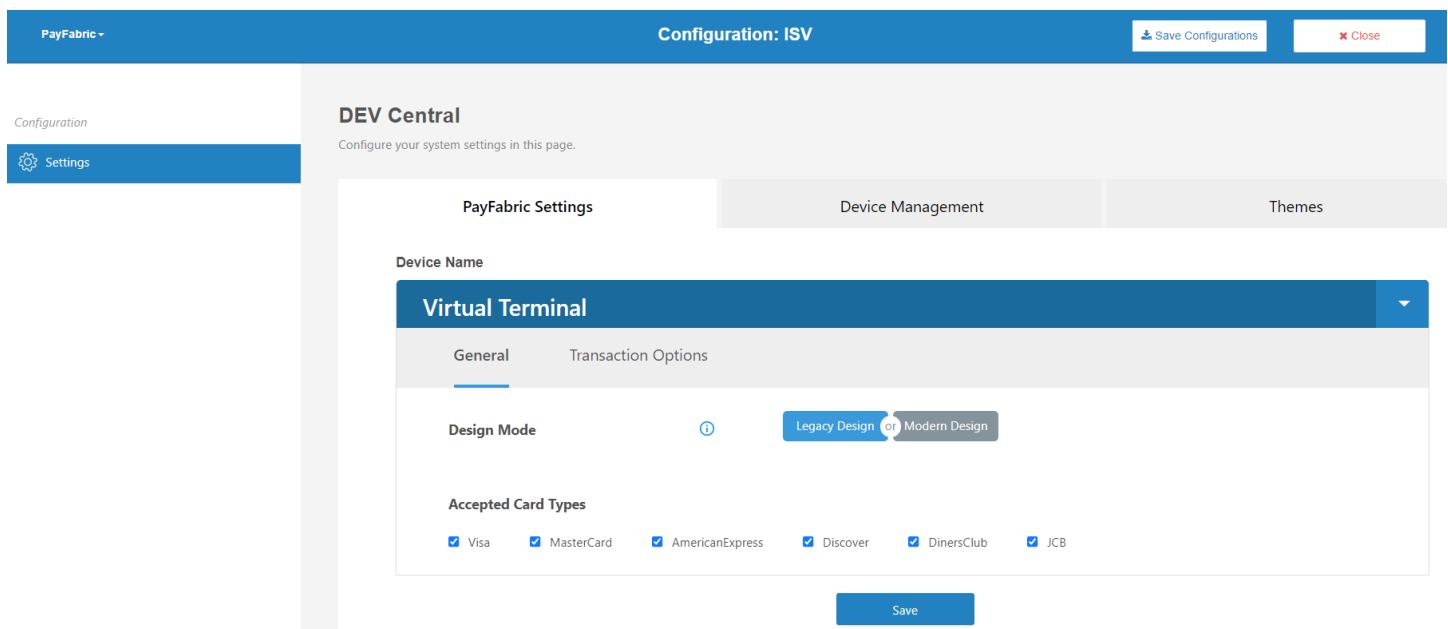
A form titled "New Configuration" with a "Cancel" button and a "Create" button. It contains two text input fields: "Name" and "Description". Below the "Name" field, there is a section for "Service(s)" with three checkboxes: "PayFabric" (checked), "PayLink", and "Receivables".

## Configure Web Access Permissions

This provides the partner user the option to configure the web access permission for their onboarded merchants, similar to the [Configure Service\(s\)](#).

## Configure PayFabric

This provides the partner user the option to configure the transaction processing settings specific to PayFabric for their integrated software/application. Click **Save Configurations** once all the preferred settings have been set.

A screenshot of the "PayFabric Configuration: ISV" interface. The top bar is blue with "PayFabric" on the left, "Configuration: ISV" in the center, and "Save Configurations" and "Close" buttons on the right. A left sidebar shows "Configuration" and "Settings" (selected). The main content area is titled "DEV Central" and "Configure your system settings in this page." It has three tabs: "PayFabric Settings" (selected), "Device Management", and "Themes". Under "PayFabric Settings", there is a "Device Name" dropdown set to "Virtual Terminal". Below this are two sub-tabs: "General" (selected) and "Transaction Options". The "General" tab shows "Design Mode" with a toggle between "Legacy Design" (selected) and "Modern Design". Below that, "Accepted Card Types" are listed with checkboxes for Visa, MasterCard, AmericanExpress, Discover, DinersClub, and JCB, all of which are checked. A "Save" button is at the bottom.

## Configure PayLink

This provides the partner user the option to configure the transaction processing settings specific to PayLink for their integrated software/application. Click **Save Configurations** once all the preferred settings have been set.

## Publish Configuration

Once configurations are completed, partner can publish the configuration package to be used during onboarding process by clicking on **Publish Configuration** button. Once publish is completed successfully, it will be converted to **Published** button.

Sort By: <span>Date Created: New - Old</span>					<a href="#">New Configuration</a>
Actions	Name	ID	Service(s)	Description	
<b>Publish Configuration</b> 	ISV	6bc6fad7-13c7-4f08-99fc-50c976bc49ed	Configure Web Access Permissions Configure PayFabric Configure PayLink		

## Copy Configuration

Partner is able to copy the existing settings from available configuration package to create a brand new one by clicking on the button.

## Edit Configuration

Partner is able to edit the existing settings from available configuration package by clicking on the button.

## Delete Configuration

Partner is able to edit the existing settings from available configuration package by clicking on the button.

## Invite Merchant

Partner user can also add new PayFabric account for merchant using the **Invite Merchant** button.

**Invite New Merchant**

Email \*

Organization

Boarding Setting \* PayFabric ▼

Configuration \* ISV ▼

Cancel
Invite

## Resend Invite

Partner user can resend invitation use the 'Resend Invite' option.

**Email:** nikkipnguyen@live.com

**Configuration:** CCA

**Resend Invite**

## Applicants

All merchant applicants onboarded through automatic boarding process will be displayed under this section along with the application status.

Applicants   Merchants   Configurations   Outbound Email   Email Templates   API Key										
2 Applicant(s)				Search Date From		Search Date To				
<input type="text" value="Search Applicant text fields"/>				<input type="text" value="MM/DD/YYYY"/>		<input type="text" value="MM/DD/YYYY"/>				
Organization	First Name	Last Name	Email	Status	Phone	DOB	ApplicationId	Created Date	Locked Date	Action
DEMO, Inc	John	Doe	john.doe@demoinc.com	In Progress	1234567890	11/28/1958	2299	1/23/2022		
TEST, LLC.	Jane	Doe	jane.doe@testllc.com	In Progress	1234567890	10/23/1954	2301	1/24/2022		

## Outbound Email

All outgoing emails across onboarded merchants will be available under this section. Partner is able to search through these emails using the provided search filter options to better support their customer.

Applicants
Merchants
Configurations
**Outbound Email**
Email Templates
API Key

Merchant: 
Email Type: 
Email Address: 
Search Date From: 
Search Date To:

48 Outbound Email(s)

Merchant Name	Email Address	Created DateTime	Status	Sent DateTime	Subject	Sent From Email	From Email Display Name	Action
TEST, LLC	jane.doe@testllc.com	1/24/2022 4:31:32 PM	Sent	1/24/2022 4:31:34 PM	Invitation From Nodus Partner	support@payfabric.com	PayFabric Services	<a href="#">View</a> <a href="#">Resend</a>
DEMO, Inc.	john.doe@demoinc.com	1/24/2022 4:28:43 PM	Sent	1/24/2022 4:28:45 PM	Welcome to EVO Payments	support@payfabric.com	PayFabric Services	<a href="#">View</a> <a href="#">Resend</a>

Partner user can view the sent email details and also given the ability to resend the same email to other recipients.

### Resend Email



Send to:

CC to:

BCC to:

SEND

## Email Templates

All enabled email templates across PayFabric services and their corresponding body message can be viewed under this section by clicking into the specific template name under **Display Name** column.

Partner is given the ability to customize the email template(s) for their onboarded merchants.

Applicants	Merchants	Configurations	Outbound Email	Email Templates	API Key
<div>Search Email Template <input type="text"/></div>					
Display Name	Status	Actions			
CAU Notification	Enabled	<a href="#">Edit</a>			
Consumer Email Branding	Enabled	<a href="#">Disable</a> <a href="#">Edit</a>			
Merchant Invite User	Enabled	<a href="#">Edit</a>			
Partner Add Merchant	Enabled	<a href="#">Edit</a>			
Partner Invite Merchant	Enabled	<a href="#">Edit</a>			
Password - Forgot	Enabled	<a href="#">Edit</a>			
Password - Partner Reset Merchant	Enabled	<a href="#">Edit</a>			
Save Merchant Application	Enabled	<a href="#">Edit</a>			
Update Device	Enabled	<a href="#">Disable</a> <a href="#">Edit</a>			
Update Merchant Billing Info	Enabled	<a href="#">Disable</a> <a href="#">Edit</a>			
Update Payment Settings	Enabled	<a href="#">Disable</a> <a href="#">Edit</a>			
Update Theme	Enabled	<a href="#">Disable</a> <a href="#">Edit</a>			

## API Key

This section provides partner with an assigned **API Client ID** and partner can also request the **API Secret Key**. These combined information can be used as the authentication mechanism for PayFabric's automatic boarding API.

## Merchant Boarding Integration Options

PayFabric supports multiple boarding approach options with different levels of integration required. All of the boarding options require EVO and the partner collaborate to establish the specifics of the boarding process.

### Partner Created Merchant Application Page

The partner creates a web page(s) to capture merchant application data. This can be part of merchant registration process for the partner solution.

- The merchant is conditionally approved for immediate processing and temporarily on 100% reserve until EVO Underwriting completes their merchant review.
- The merchant will be under a pre-arranged simplified pricing model.
- The merchant is created within the partner's organization in PayFabric and configured to partner's prebuilt customization.

### Partner uses the PayFabric On-line application

The partner guides the merchant to a PayFabric created application web page. which captures merchant application data. This can be part of merchant registration process for the partner solution. The application page is invoked via a merchant-specific URL.

- The merchant is conditionally approved for immediate processing and temporarily on 100% reserve until EVO Underwriting completes their merchant review.
- The merchant will be under a pre-arranged simplified pricing model.



- The merchant is created within the partner's organization in PayFabric and configured to partner's prebuilt customization.

## EVO Now Hosted Online application

The partner provides leads to EVO. EVO emails merchant-specific application link to the merchant. The merchant completes the on-line application which goes through the normal EVO approval process.

- The merchant can be under any pricing model and under negotiated pricing.
- Once approved, EVO creates the merchant within the partner's organization in PayFabric and configured to partner's prebuilt customization.
- This boarding approach is required for POS MID's requiring a terminal device be deployed.

## Boarding Process Steps

### Partner Created Merchant Application Page

1. The partner creates a web page(s) to capture EVO Merchant Processing Agreement (MPA) application data. The MPA data can be captured as a part of the partner's merchant registration process or adding payments to an existing merchant account as long as the required fields and consent data are captured and submitted to EVO via the PayFabric Boarding API.
2. The partner presents their MPA data page(s) to the merchant.
3. The merchant completes the MPA data and partner submits MPA data to PayFabric
4. On a successful boarding, The PayFabric API responds to the partner with the merchant credentials required for the partner to execute all merchant functionality. See the *PayFabric Partner API Guide* for details, the link is below.
  - 4.1. If a partner will be executing payments from their solution application, PayFabric requires unique, merchant-specific "Device" credentials for the application connection. The required Device credentials are then provided in the Boarding API response.
  - 4.2. It is possible for the partner to set up unique PayFabric solutions for multiple partner solutions.
  - 4.3. Customizing of Merchant Configurations is not within scope of this document, but it can be done manually via the PayFabric Partner Portal or via Partner API. Since this set up is only done once per partner solution, it is recommended it be done via the Partner Portal. This can be done in the Sandbox and later transferred to the Production environment.
5. PayFabric sends out partner's custom Welcome Email to the merchant using the merchant contact information captured in the MPA data. EVO and the partner collaborate on the content of the partner-specific Welcome email.
6. The Partner completes any boarding or registrations processes needed for their solution.
7. The partner presents the "Process Complete" notification to the merchant.

## Partner uses PayFabric On-line application

1. The Partner provides EVO with the below URLs so that the EVO can configure the partner for using PayFabric's Online Application.
  - 1.1. Callback URL: [Optional] The URL the partner will listen to if using PayFabric Callback functionality - See Item 10.2 below.
  - 1.2. Return URL: [Optional] The URL a merchant will return to after completing the EVO online application. – See items 12 – 14 below
  - 1.3. Partner Logo URL: [Conditional] for display as the button to the Return URL on the Application Completion page – see item 12 – 14 below.
2. The partner creates their solution registration process or registration for payment processing process with the PayFabric Online Application included as desired.
3. The partner calls PayFabric Boarding API to create a Boarding Token. The Boarding Token is a unique boarding instance identifier.
4. The partner uses the Boarding Token to create a merchant-specific URL to the PayFabric single-page UI in the format: <https://www.payfabric.com/Portal/Boarding?token={BoardingToken}>.
5. The partner has the options to present the PayFabric On-line application page as an iframe on a page, new page, or new tab.
6. The partner indicates which partner solution and saved PayFabric Merchant Configuration will be used with this merchant. Customizing of Merchant Configurations is not within scope of this document, but it can be done manually via the PayFabric Partner Portal or via Partner API. Since this set up is only done once per partner solution, it is recommended it be done via the Partner Portal. This can be done in the Sandbox and later transferred to the Production environment.
  - 6.1. It is possible for the partner to set up unique PayFabric solutions for multiple partner solutions.
7. Using the merchant-specific URL, the partner presents the EVO Merchant Processing Agreement (MPA) application to the merchant. See [Sample PayFabric Online Application](#) screenshot.
8. The merchant completes and submits the online MPA. The merchant can save a partially completed MPA and return later to complete it.
9. On a successful boarding, The PayFabric API responds to the partner with the specific boarding token that was successfully boarded.
10. The partner has 2 options to in order to get all required data and credentials for the partner to execute all merchant functionality. See the PayFabric Partner API Guide for additional details, the link is below.
  - 10.1. Option 1: Call "Get Merchant Credentials" and "Get Merchant Details" API's to get the associated information.
  - 10.2. Option 2: Listen on the Partner Callback URL, when this is configured in the PayFabric Partner Configuration. The Callback URL sends an API call to a static URL hosted by the Partner.
  - 10.3. If a partner will be executing payments from their solution application, PayFabric requires unique, merchant-specific "Device" credentials for the application connection. The required Device credentials are then provided in the Boarding API response.

11. PayFabric sends out partner's custom Welcome Email to the merchant using the merchant contact information captured in the MPA data. EVO and the partner collaborate on the content of the partner-specific Welcome email.
12. PayFabric presents the Application Completion page. See sample image of the Application Completion page at the end of this document.
  - 12.1. The Application Completion page always contains a link to register to MyEVO. MyEVO is the EVO provided merchant report portal.
  - 12.2. The link to register to PayFabric is only provided if the partner's solution has merchants using the PayFabric portal.
  - 12.3. The Partner logo and link are only presented if the partner provides a Boarding Return URL.
  - 12.4. When the merchant selects the partner logo on the Application Completion page, the merchant is passed back to the partner-supplied Boarding Return URL; if one has been provided. The Boarding Return URL is optional. If provided, it is included in the partner's configuration on PayFabric. The partner configuration is handled by EVO for both the Sandbox & Production environments.
13. The Return URL enables PayFabric to pass the merchant back to the Partner's portal so the merchant can complete any remaining steps in the partner's registration processes needed for their solution.

## Testing the Boarding Process

1. If using the URL functionality of the PayFabric Online Application approach, the partner must provide URL values for the Callback URL, Return URL, and Partner Logo URL. See Process Step 1 of the PayFabric Online Application.
2. EVO will provide the partner a Sandbox Partner Account. Typically the partner account will not be set up for payment processing, but payment processing functionality can be added if desired.
3. EVO payments will create the first test merchant with processing capabilities and access to PayFabric VT, PayLink and PayFabric Receivables as desired by the partner.
4. The partner may create as many merchant test accounts as desired.
5. These accounts are maintained throughout the partner's relationship with EVO.
6. All payment processing testing is done in the Sandbox. The detail on payment processing is not within scope of this document.
7. All development and testing of merchant creation and merchant configuration is done in the Sandbox. The detail on merchant creation and merchant configuration is not within scope of this document.
8. Until the Boarding Simulator is released, boarding testing is done in the Production environment. This testing needs to be coordinated with the PayFabric team to not disrupt live production processes. The boarding APIs can be called in the Sandbox but the Sandbox may not return successful boarding responses depending on the state of internal EVO test boarding platforms.
9. After all merchant creation, payment processing, and boarding integrations are successfully completed, an EVO-attended, controlled, end-end test of merchant creation through test payment processing can be done in Production. Again, this needs to be coordinated with EVO so it does not impact Production processes.

# Documentation & Support

## PayFabric Partner API Guide

Boarding API documentation is provided as part of the Partner API Guide. Due to the proprietary nature of the Partner level integration documentation, this information is not on GitHub but provided at:

<http://www.nodus.com/wp-content/uploads/2022/02/PayFabric-Partner-API-Guide.pdf>

## Support

For more assistance on using the PayFabric APIs, reach out to your PayFabric Solution Engineer.

# Sample Page Images

## PayFabric Online Application

Certain sections expand/appear as the merchant completes the application.

Simplifying Payments Around the Globe

Deutsche Bank

Merchant Application - Immediate Processing
Need to Return Later?

To provide secure payment processing we need to understand your business, please complete the below application.

Tell us about yourself

Contact Name
First Name
Last Name

Email Address
jms.allison@evopayments.com
Mobile
7703368433

Tell us about your business

Legal Business Name
Legal Business Name

Doing Business As
Same as Legal Business Name
Online App Test

Business Type
Select Business Type

Fed Tax ID (SSN if Sole Proprietor)
M123456789

Business Start Date
MM/YYYY

Website URL
http://example.com

Phone

Business Address
Address (No PO Boxes)
City
State
Zip Code

What does your business do?

Select your Merchant Category
Search for your industry

Who owns this business?

Is this Owner the Contact?
Owner Name
First Name
Last Name

Email Address
bsh@example.com
Mobile

Owner Address
Same as Business Address
Address
City
State
Zip Code

Date of Birth
MM/DD/YYYY

Social Security Number

Primary owner must be a US Citizen with a Social Security Number
CEO, CFO, President, etc.

Owner has significant responsibility to control manage or direct the company

Ownership Percentage
%

Add an Owner
Complete information on all owners with 25% or greater equity ownership in the company listed below must be disclosed on your application per U.S. Treasury Customer Due Diligence Requirements.

Where do we deposit your funds?

Bank Name
Bank Name

Name on Bank Account
Name on Bank Account
Account Owner Type

U.S. Bank Account
Routing Number
Confirm Routing Number

Account Number
Confirm Account Number

Let's keep your payment data secure

Payment Card Industry Data Security Standards ("PCI DSS") and Payment Card Network rules prohibit storage of track data under any circumstances. If you or your Point of Sale ("POS") system pass, transmit, store or receive full cardholder's data, then the POS software must be Payment Application Data Security Standard ("PA-DSS") compliant and installed by a Qualified Integrator Reseller (QIR), and you (Merchant) must validate PCI DSS compliance. If you use a payment gateway it must be PCI DSS compliant and you (Merchant) must validate PCI DSS compliance.

1. Have you ever experienced and Account Data Compromise(ADC)? ☐ Yes ☐ No

You must view the agreement disclosure prior to accepting this agreement. By submitting this application, I confirm that I am authorized to enter into the agreement on behalf of business indicated.

I have read and agree to the EVO Merchant Processing Agreement terms, conditions, and pricing. Read EVO Merchant Processing Agreement terms, conditions, and pricing

Electronically Sign and Submit

Please anticipate a call from an EVO Payments Support Representative.

Privacy Policy
EVO is a registered ISO/MSP for Deutsche Bank Trust Company Americas, New York
NY12.58.20164.1

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29

## Application Completion page

The Application Completion page uses logos as button to link to related URLs. The presented logos are center justified.

- The MyEVO logo is always displayed. This links to the MyEVO registration page. MyEVO is the EVO provided merchant portal merchants use to access their statements, reporting, chargebacks and other acquirer information.
- The link to register to PayFabric (not shown) is only provided if the partner's solution has merchants using the PayFabric portal.
- The Partner logo and link is optional and displayed if the partner provides a Boarding Return URL.

