MMS New User Guide

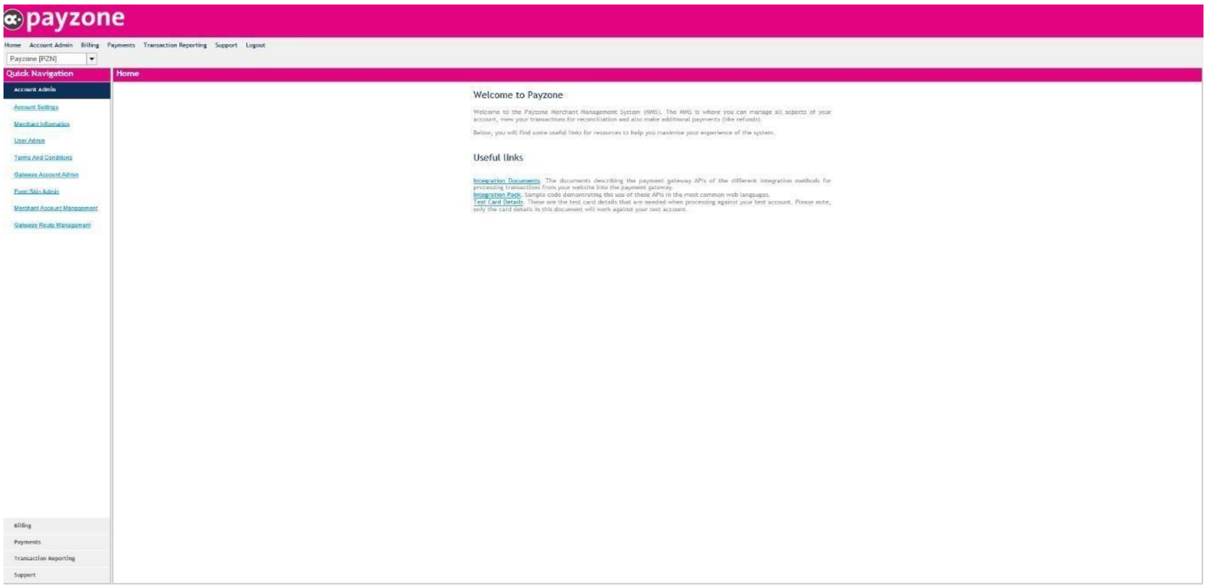
A how-to guide for getting set up to take payments with your Merchant Management System.

CONTENTS

MMS NAVIGATION

There are two ways to navigate through the MMS; the menu bar across the top and the options along the side.

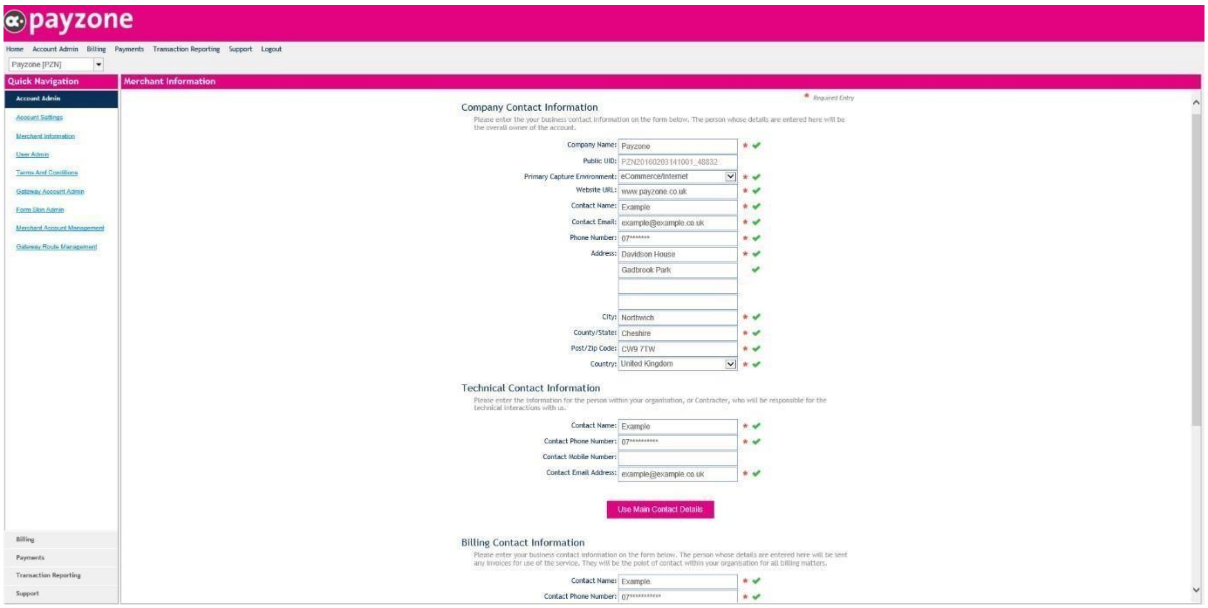
These menus will be covered throughout this document:



MERCHANT INFORMATION

This page contains all basic information about you. Please ensure this information is kept upto date.

You can also enter technical information. This would be the person within your organisation or contractor who will be responsible for technical interactions.



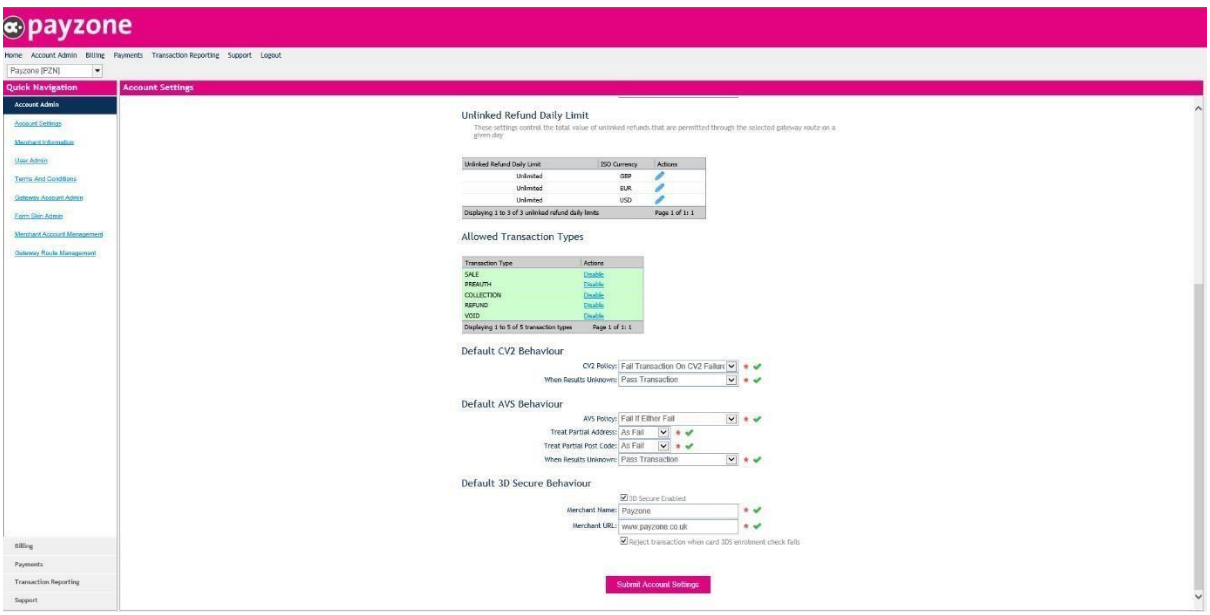
ACCOUNT SETTINGS

This page allows you to control the outcome of a transaction when certain security features fail or are not present.

CV2 refers to the last three digits on the back of the debit and credit cards.

AVS stands for Address Verification System.

By default the security settings are set to the strictest possible standard. Settings on this page can only be changed by yourself.



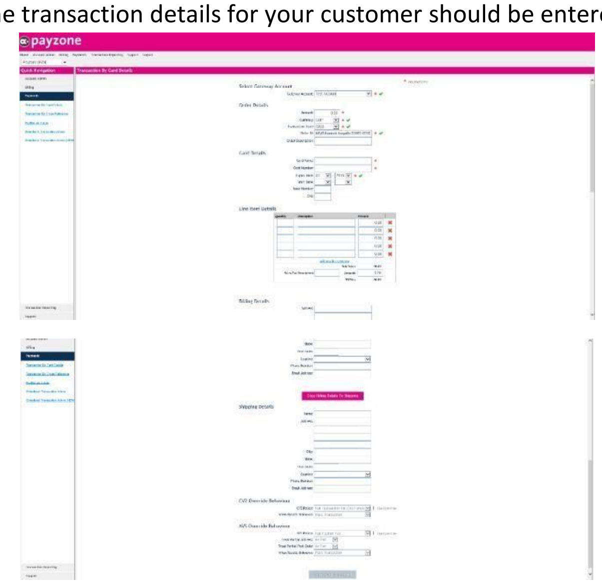
HOW TO PROCESS A TRANSACTION?

When logged into MMS go to the Payments tab and then select Transaction by Card Details:

The payment page will then appear.

Fill out all the details needed to make a payment, make sure all the sections with '*' are filled in or the payment won't process.

Below is an example of how the transaction details for your customer should be entered.



In the box 'transaction type' you will see there is a drop down box which states SALE, PREAUTH and REFUND, make sure you select 'SALE' when processing a transaction.

Once all the details are entered for your transaction you need to then click 'Submit for Processing' button.

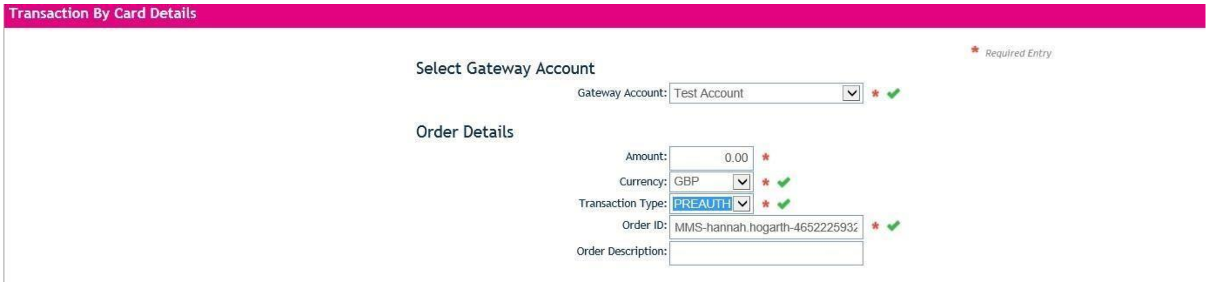
If all the details are correct you will see a successful confirmation message appear:

To access a receipt of the transaction click on 'View Receipt' at the bottom on the response message. Here you will have the option to print the receipt if needed.

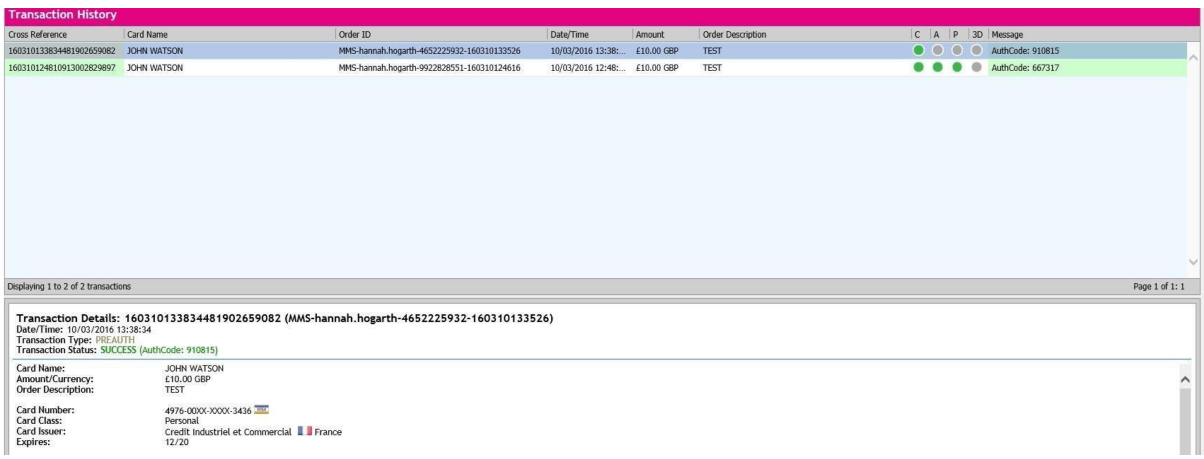
PRE–AUTHORISATION TRANSACTION

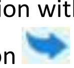
You run a pre-authorisation the same way you run a sale on page '4'.

In 'transaction type' field simply select 'PREAUTH' instead of 'SALE'.



To collect the selected preauth transaction you need to find the original pre-authorisation made within your transaction history as seen below. If more than one transaction has been made that day make sure you select the correct transaction:



Once you have selected the pre-authorisation transaction within the transaction history to collect this you need to select the 'collect the selected preauth transaction' Icon  which is on the main tool bar.

A pre-authorisation can be held for five working days, if you haven't collected the preauth within these five working days the money will be released back into your customer's bank.

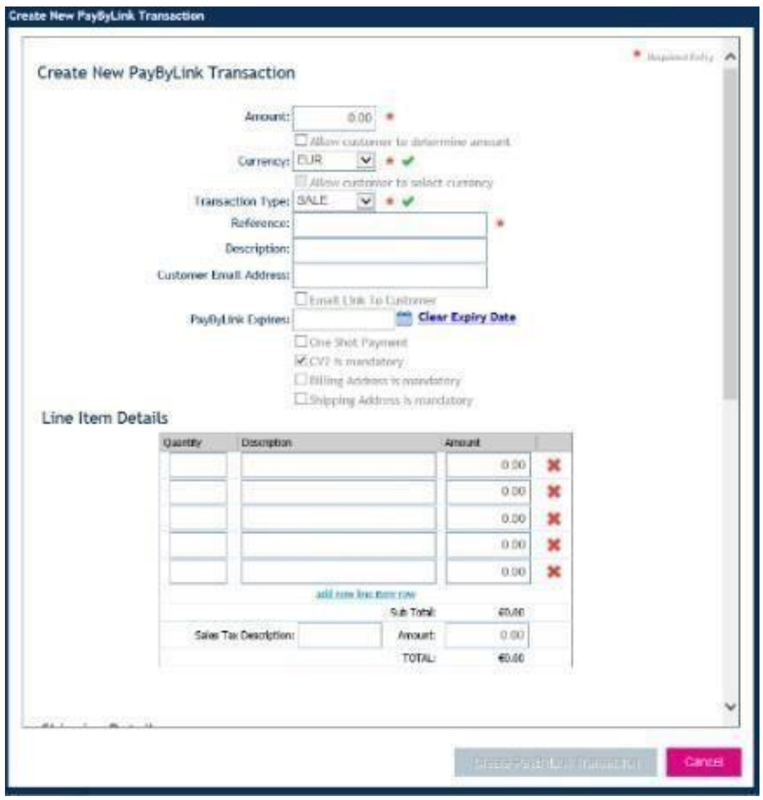
PAYBYLINK / E-INVOICING

PayByLink lets you invoice your customers by sending them a link to a secure payment page via email.

Using the menu bar across the top of the page select 'Payments' and then select 'PayByLink Admin' from the drop down box. This will open a page that looks like the below:

The above page will also show previous PayByLink's that have been set up.

To create a new PayByLink you need to select 'Add New' from the tool bar and then the page below will appear:



Fill out all the relevant information. Make sure you enter your customers email address so that the PayByLink has a destination to go to.

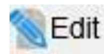
There are two ways to send the PayByLink to your customer.

1) If you tick the box 'email link to customer' and press 'Create PayByLink' an email with the link to a unique payment page will be sent to your customer directly.

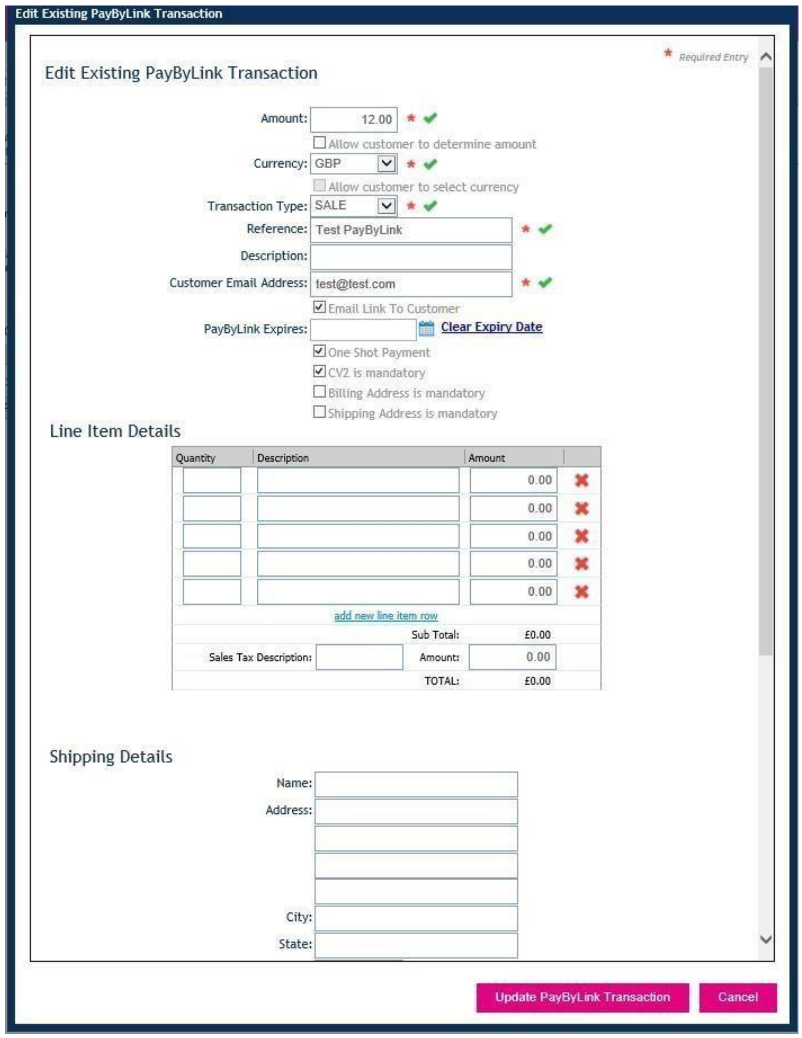
2) You can send the PayByLink to your customer using your own email template by un-ticking the 'email link to customer' box and when you click 'create PayByLink' the link will then be sent to your own email address and you can then copy and paste the link into your own email template to send to your customer.

VIEW, EDIT OR RESEND PAYBYLINK

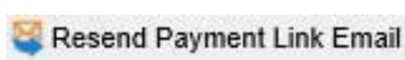
You can also view and edit the existing PayByLink transactions by selecting the 'Edit' Icon from the tool bar:



The page below will appear, you can Edit the amount and or any other information you require to be changed:



To resend a PayByLink to the same customer you need to select 'Resend Payment Link Email' which is situated along the tool bar:



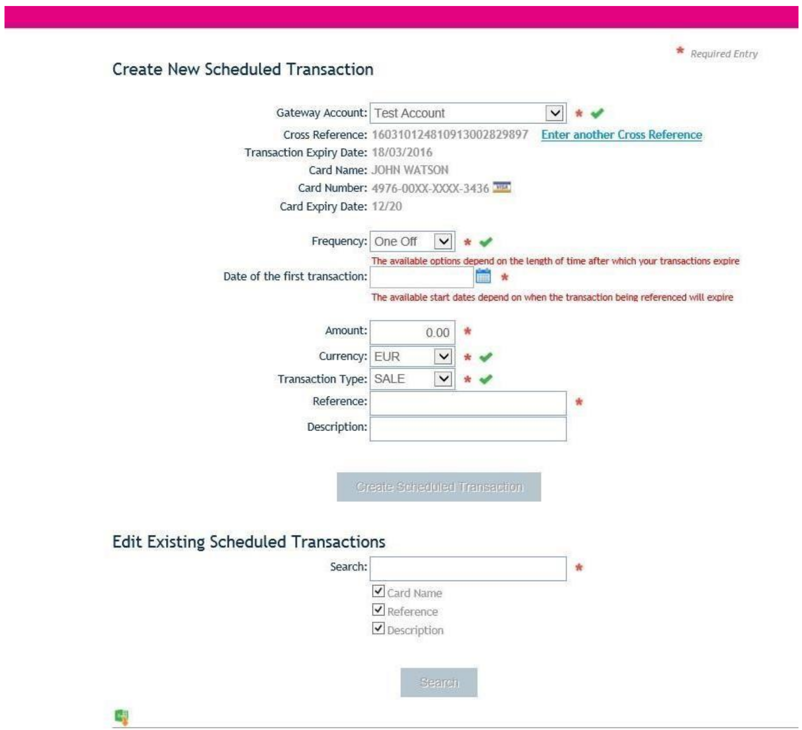
SCHEDULED / RECURRING TRANSACTIONS

Scheduled / Recurring transactions can be set up within the Transaction Reporting and Transaction History section.

To do a scheduled transaction you do need to make a one off transaction first and then schedule the payment from the original payment taken.

Using the menu bar across the top of the page select Transaction Reporting and then click Transaction History from the drop down box, find and select the transaction you want to work with.

Once you have found the transaction you want to schedule you then click the ‘Set-Up Scheduled Transaction using details of the selected Transaction’ Icon:



When you have clicked on the icon above another page will open that looks like the following:

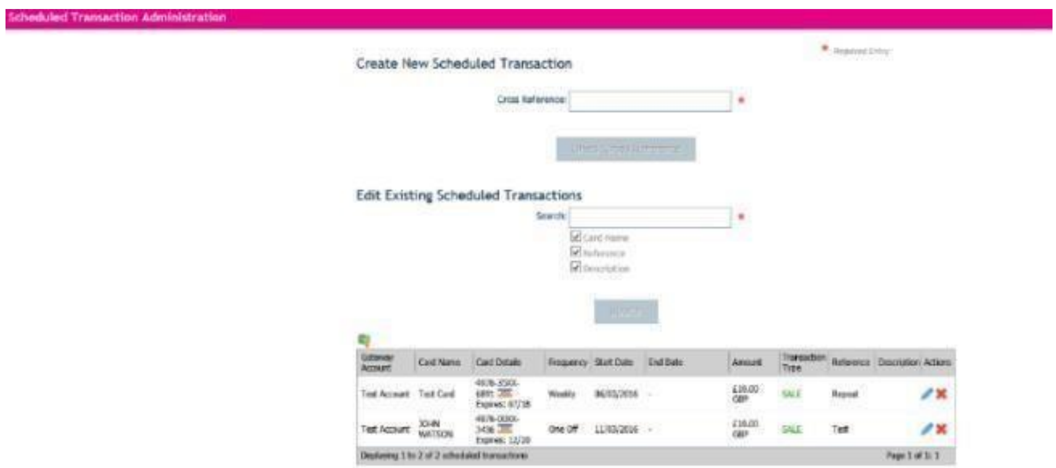
You need to fill out all the relevant information on the page and the sections with ‘*’ are all mandatory.

When you have finished filling the information in click ‘Create Scheduled Transaction’ at the bottom on the page. You will then see a confirmation box appear which indicates the scheduled transaction has been successfully created:

EDIT EXISTING SCHEDULED TRANSACTION

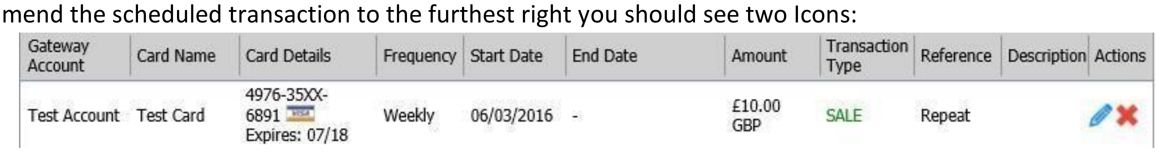
Using the menu bar across the top of the page select 'Payments' and then from the drop down box select 'Scheduled Transaction Admin':

It will then open a page which looks like the following image:



If you have many scheduled transactions set up, you can utilise the search function. You can search by Card Name, Reference or Description.

To amend the scheduled transaction to the furthest right you should see two Icons:



 and it should open a box which looks like the below:

Click the 'Edit' icon

Gateway Account	Card Name	Card Details	Frequency	Start Date	End Date	Amount	Transaction Type	Reference	Description	Actions
Test Account	Test Card	4976-35XX-6891 Expires: 07/18	Weekly	06/03/2016		10.00 GBP	SALE	Repeat		

Here you can amend the end date, amount, currency, reference and description. Once you have amended the information you need to click the icon to initiate the changes to the scheduled transaction.

To delete the scheduled transaction you need to click the icon.

TRANSACTION HISTORY

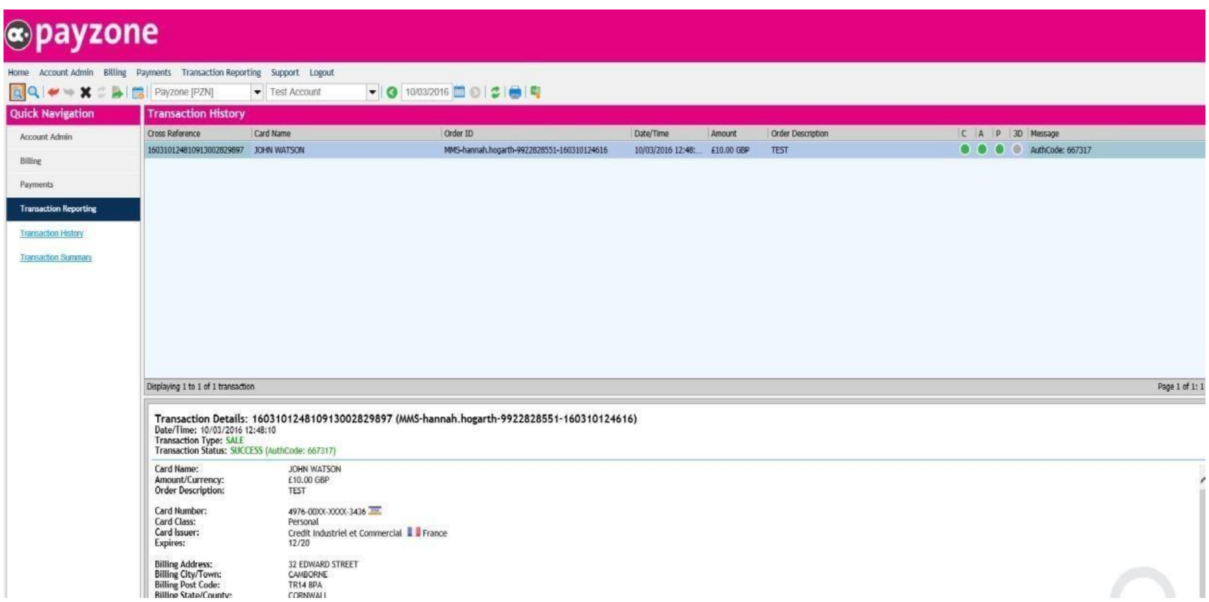
To view your transaction history select the ‘Transaction Reporting’ tab and then select ‘Transaction History’:

This shows transactions listed by day.

To find the transaction you need to change the date on the tool bar to the date you made the payment.

Then select the drop down box and chose your Ecomm, MOTO or TEST account depending on which account you made the payment through.

All details regarding the transaction will appear as shown below:

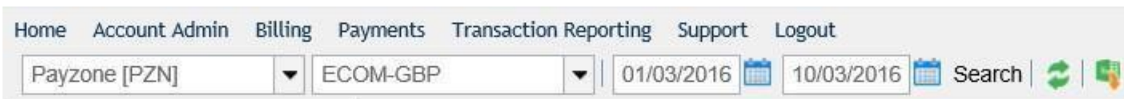


TRANSACTION SUMMARY

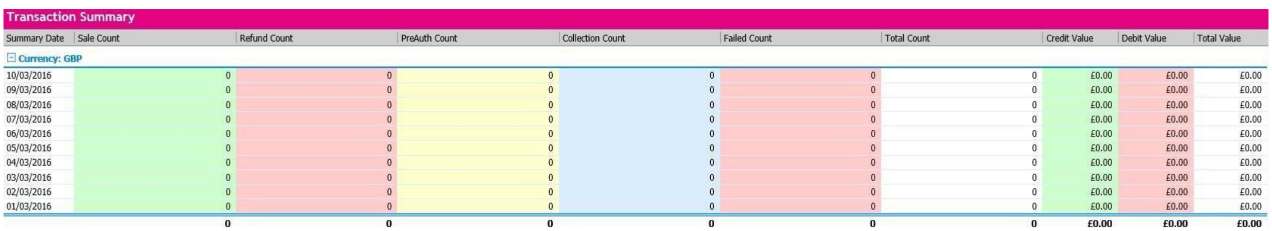
The Transaction Summary is a summary of transactions completed on any given day.

To run a transaction summary select the 'Transaction Reporting' tab and then select 'Transaction Summary':

By default the transaction summary will show the current month's summary, if you wish to view a different reporting period select the start and end date from the tool bar:



Once selected click the search button and the date ranges you have selected will be displayed as below:


Transaction Summary

Summary Date	Sale Count	Refund Count	PreAuth Count	Collection Count	Failed Count	Total Count	Credit Value	Debit Value	Total Value
Currency: GBP									
10/03/2016	0	0	0	0	0	0	£0.00	£0.00	£0.00
09/03/2016	0	0	0	0	0	0	£0.00	£0.00	£0.00
08/03/2016	0	0	0	0	0	0	£0.00	£0.00	£0.00
07/03/2016	0	0	0	0	0	0	£0.00	£0.00	£0.00
06/03/2016	0	0	0	0	0	0	£0.00	£0.00	£0.00
05/03/2016	0	0	0	0	0	0	£0.00	£0.00	£0.00
04/03/2016	0	0	0	0	0	0	£0.00	£0.00	£0.00
03/03/2016	0	0	0	0	0	0	£0.00	£0.00	£0.00
02/03/2016	0	0	0	0	0	0	£0.00	£0.00	£0.00
01/03/2016	0	0	0	0	0	0	£0.00	£0.00	£0.00
	0	0	0	0	0	0	£0.00	£0.00	£0.00

You can then export the results into a CSV file by using the icon on the tool bar:

SEARCH TRANSACTION

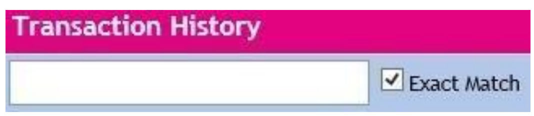
The search function works within the Transaction Reporting and the Transaction History and allows you to look up past transactions using a variety of different search fields.

To find a particular transaction you need to click on the search Icon on the tool bar:

You will then have a search panel appear. Please note that the date range needs to be filled in, all other fields are optional:

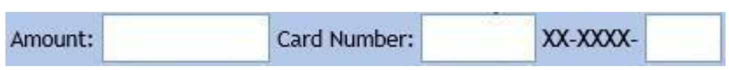
If you tick the ‘Exact Match’ box next to the long empty box which is the keyword box you can search by Cross Reference, Order ID, Order Description and Card Name.

If you un-tick the ‘Exact Match’ box you can search by Cross Reference, Order ID, Order description or Card name:



You however don’t have to use the ‘keyword box’ you can search by date.

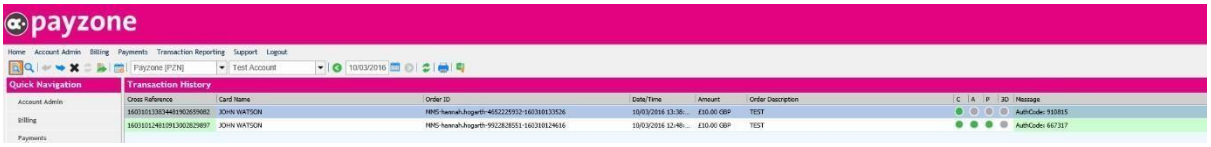
There are additional search fields which include Amount and Card Number (first six digits or Last 4 digits). These can be useful for finding Chargebacks:



You can export the search results into a CSV file by clicking the ‘Export The Current Transaction to CSV File’ Icon on the tool bar:

HOW TO PROCESS A REFUND OR VOID A TRANSACTION

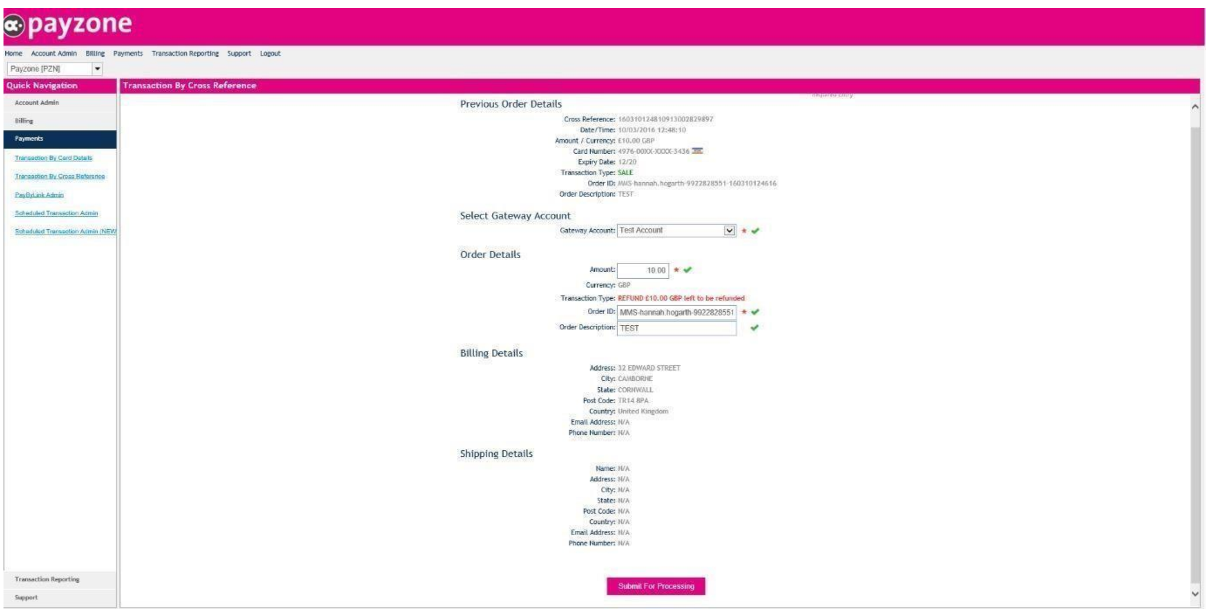
To Refund go to Transaction Reporting and then Transaction history and select the date which you processed the original payment and select/highlight the original payment:



If there is more than one payment on the page, select the correct payment.

Once payment is selected within the transaction history if you look on the Icon tool bar to the left of the page you will see an arrow facing left:

Click on the arrow facing left and the page below will appear:



Check all the details are correct and the transaction type states ‘Refund’ and the submit for processing and then your refund is complete and will be returned to your customer within 10working days.

You can void a transaction by clicking the Icon ✖ on the main tool bar once you have selected the transaction made in the transaction History. You can only void a transaction on the same day the original transaction initially occurred. If it has been over a day since the transaction was made you will have to run a refund.

USER ADMIN

This page is used to add new users to your MMS account as well as editing existing users.

Create New User:

To create a new user you are required to enter a relevant username and email address for the person you wish to add.

You can also set specific user rights for each user you wish to add. See below the description of each of the different user rights and what they are intended for:

Merchant Administrator

Basic User

Restricted Basic User: make and

Developer

Merchant Viewer

See below the Appendix for MMS user Roles:

	Merchant Viewer	Restricted Basic User	Basic User	Merchant Administrator	Developer	Merchant Super User
View Transaction History (Only Transactions By this user)	✓	✓	✓	✓	✓	✓
View Transaction History (All Transactions)	✓	✗	✓	✓	✓	✓
View Transaction Summary	✓	✗	✓	✓	✓	✓
View	✗	✓	✓	✓	✓	✓
View Scheduled Transactions	✗	✗	✓	✓	✓	✓
Run Sale/PreAuth	✗	✓	✓	✓	✓	✓
Run Collection	✗	✗	✓	✓	✓	✓
Create/Edit PayByLink	✗	✓	✓	✓	✓	✓
Create/Edit Scheduled Transaction	✗	✗	✓	✓	✓	✓
Run Void/Refund	✗	✗	✗	✓	✓	✓
Run Unlinked Refund	✗	✗	✗	✓	✓	✓
Edit Account Settings	✗	✗	✗	✗	✓	✓
Edit Merchant Information	✗	✗	✗	✗	✗	✓
Edit HPF Skin	✗	✗	✗	✗	✗	✓
Edit Gateway Account Admin	✗	✗	✗	✗	✗	✓
Create New Viewer/Restricted/Basic User	✗	✗	✗	✗	✗	✓
Create New Administrator/Developer	✗	✗	✗	✗	✗	✓
Register Billing Card	✗	✗	✗	✗	✗	✓

Edit Existing Users:

In this section you can view and edit your existing users. In the actions column there are four icons:

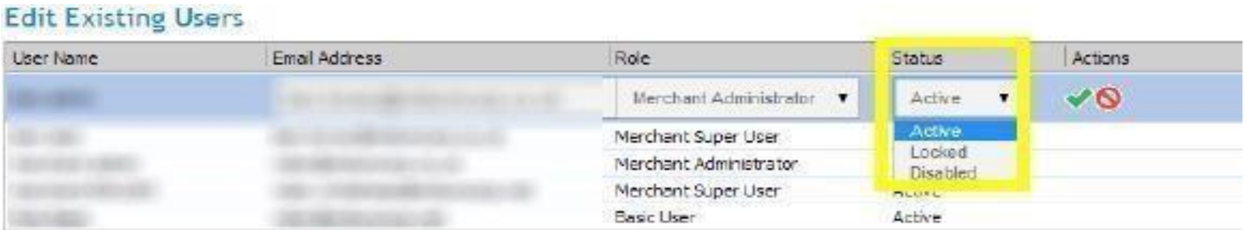
- Edit User Icon
- Delete User Icon
- Reset User Password
- Reset User Secret Question

Select the action you require:

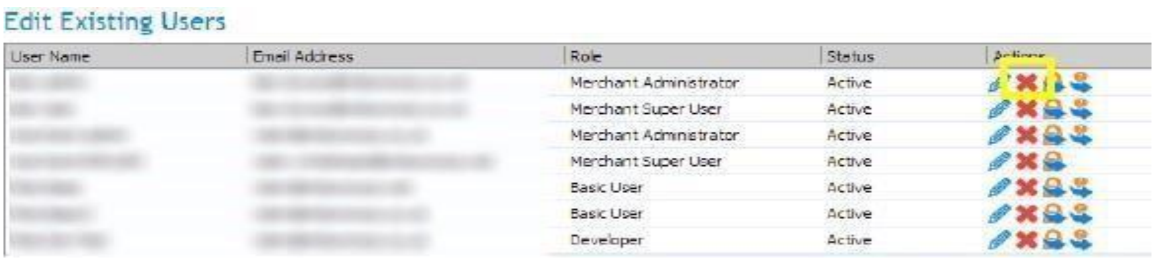
Edit Existing Users

User Name	Email Address	Role	Status	Actions
[illegible]	[illegible]	Merchant Administrator	Active	
[illegible]	[illegible]	Merchant Super User	Active	
[illegible]	[illegible]	Merchant Administrator	Active	
[illegible]	[illegible]	Merchant Super User	Active	
[illegible]	[illegible]	Basic User	Active	
[illegible]	[illegible]	Basic User	Active	
[illegible]	[illegible]	Developer	Active	

If you get locked out of MMS. If their status shows as 'locked' select 'Active' from the drop down box to unlock their account:

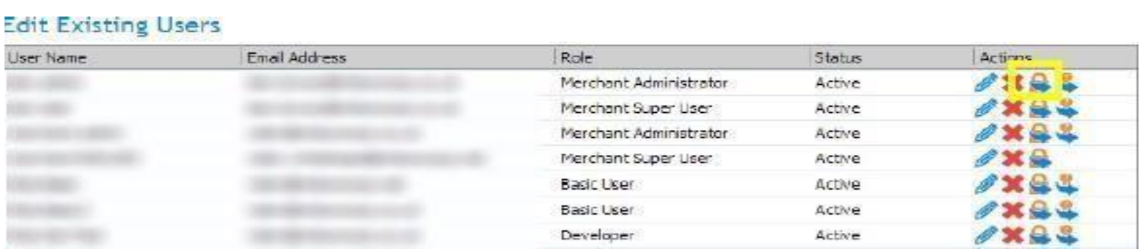


You can also disable users by selecting 'Disabled' from the drop down box:



Forgotten password:

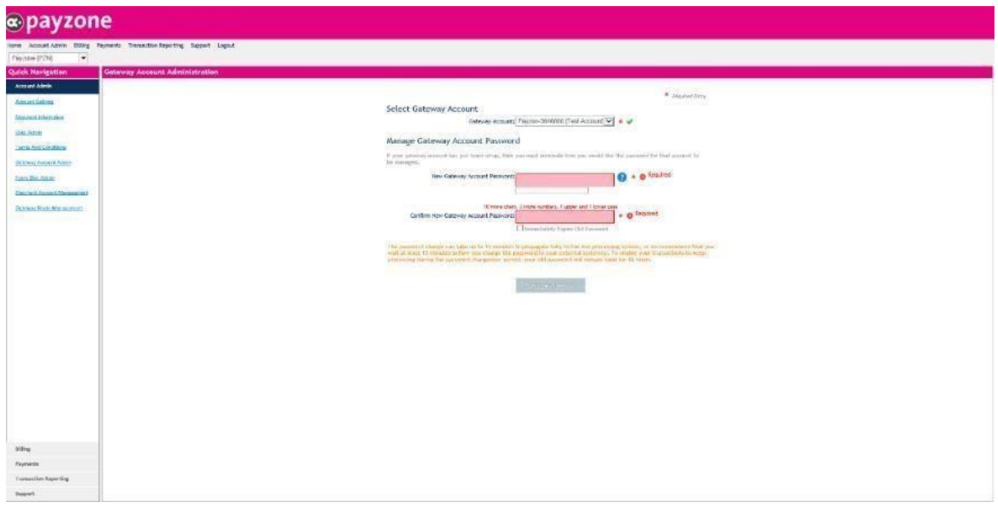
If your users forget their password or their secret question you can reset this for them within the 'User Admin' page:



HOW TO FIND THE MERCHANT ID & PASSWORD

When your web developer is integrating the payment gateway your external system will ask for a 'Merchant ID' and a 'Gateway password' these are found within your merchant management system.

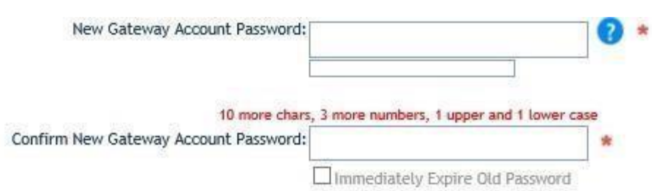
You need to log into your merchant management system and go to the 'Account Admin' tab and then select 'Gateway Account Admin' from the drop down box.



Where it states 'Gateway Account' on the gateway account admin page you need to select the 'ECOMM-GBP' account which is stated in brackets after the 'Word' the '– 'and the '7 numbers' as that is the account used to integrate into your website.

Your merchant ID is the 'word' the' – 'and the '7 numbers'. You do not need the 'ECOMM-GBP' in brackets that is just so you select the correct account if more than one. This is case sensitive.

The Gateway Password needed is on the same page were it states 'Manage Gateway Account Password'



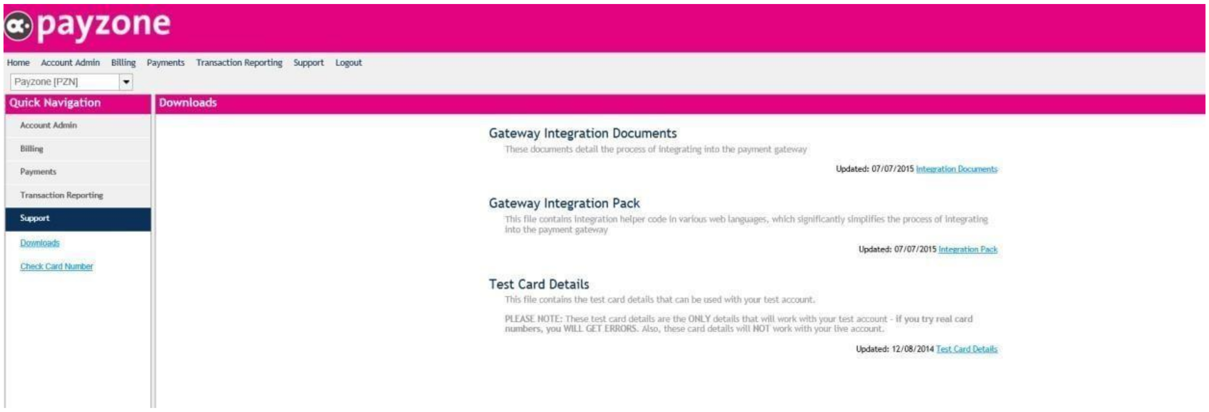
This password is for you to create to pass to your web developer, it consists of Upper Case, Lower Case and three Numbers. You need to create your password, then below confirm your password and then select 'Change password' at the bottom of the page. At the top of the page it will say it has been successful changed.

You need to wait 15minutes once you have created your password before entering it into your external systems for it to register fully. Again your password is all Case sensitive.

If your 'Merchant ID' or 'Gateway password' do not match when you have entered them into your external system you will get a 'HASH DIGEST' or 'Merchant Does Not Exist' error.

SUPPORT SECTION

The support section in the MMS is where all the technical integration documents and other support documents are located.



For any further assistance you can contact PayZone Online team on:

Contact Payzone Online Team

Email Address: online@payzone.co.uk

Support Team: 01606 566 600.