

## Elavon Converge Virtual Terminal Refund Guide

This is a quick-start guide to using the Elavon Converge virtual terminal. This new interface will replace the ePay workstation interface and the eCommerce Control Center (ECC).

As your unit migrates to the Converge Virtual Terminal transactions will end on ePay terminals as settlement and refunds will phase out via the ECC.

Just like PSU eCommerce, sales may only be conducted on properly secured, segmented workstations. **Only log into Converge to process payments from the secured, segmented workstation.** Later this fall we will be adding encrypting hardware to allow greater flexibility in payment data entry.

This document briefly reviews the screens you will see when processing a Refund. Refunds do not require entry of the full card number so they may be processed on a regular administrative workstation (much like ECC access). Although you may print this if you desire the screens are simple and intuitive. Once you step through a refund or two you will not need the guide. We recommend you review it online and maybe keep an electronic copy handy on your workstation for a quick referral if needed.

If you don't have them yet, your Converge accounts will be issued through your FO. When you first log in you will need to change your password and set three security questions. As you will see all transactions are logged by UserID. It is important that you keep your account credentials secure and not share them with others. Depending upon your role you may have more or less capability on the system than others. Converge gives us more granularity and role-based controls. In practicing least privilege we will work with your FO to refine your role and tune it to your unit's business needs.

From within the Converge interface you can find additional Elavon guides under the Support Section. While there are areas there for submitting feedback please direct your feedback on the Converge to your supervisor and/or FO so it can be addressed by the Merchant Management Team.

Go to <https://www.myvirtualmerchant.com>, Sign In with PSU's Account ID, your User ID and Password.

The image shows a 'Sign In' form with a green title. It contains three input fields: the first contains '728029', the second is labeled 'User ID', and the third is labeled 'Password'. A green 'Sign In' button is below the fields. At the bottom, there are links for 'Forgot Password?' and 'Help'. A red rounded rectangle highlights the three input fields.

For refunds you will be logged into your terminal and have Current Batches and Settled Batches on your left menu.

**NOTE: Entry of credit card numbers may only be done on properly secured and segmented workstations (formerly known as ePay workstations). For that reason we are only processing “refunds” and not “returns”. Returns require entering the full card number and because many financial settlement staff do not have a secured and segmented workstation they are not able to enter the card number. To process the refund the authorization must first settle. It can then be refunded the next day. Also you should not process a Void for normal transactions. Allow the transaction to settle and issue a refund.**

To process a refund click on on Settled Batches, then Main.

The screenshot shows the Converge Virtual Terminal interface. The top navigation bar includes links for MerchantConnect, Support Section, Foreign Exchange Rates, Help, and Logout. The left sidebar contains the Converge logo (formerly Virtual Merchant), user information (User: Robbie Refund, Account: 002551, Terminal: Demo), and a menu with 'Current Batches' and 'Settled Batches' (both with checkboxes). The main content area shows 'USER' and 'Main' with a welcome message: 'Welcome to Converge. The Converge Virtual Terminal system is a secure internet-based transaction processing system that enables your business to process transactions in real-time.' A red rounded rectangle highlights the 'Current Batches' and 'Settled Batches' menu items.

From the next screen, select the batch for the day the transaction was authorized:


MerchantConnect | Support Section | Foreign Exchange Rates | Help | Logout

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User: Robbie Refund  
Account: 002551  
Terminal: Demo

Current Batches  
 Settled Batches

- Main
- Gift Card
- Loyalty Card

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USER

## Settled Activity

Select the batch to review

Settled Batch Activity
Download | Reports | Reports Plus | Search

• 9 items

Batch#	Batch Response	Settled Date	Net Count	Net Amount	Number Purchase/Forces	Number Returns	Number Voids
008	GBOK 00811030409	2015-11-03 04:09:38	1	1.00	1	0	0
007	GBOK 00709300409	2015-09-30 04:09:28	1	3.36	1	0	0
006	GBOK 00609290409	2015-09-29 04:09:24	1	1.00	1	0	0
005	GBOK 00509250409	2015-09-25 04:09:40	2	6.72	2	0	0
004	GBOK 00409230409	2015-09-23 04:09:41	6	59.84	6	0	0
003	GBOK 00309220409	2015-09-22 04:09:19	4	11.00	4	0	0
VOID	GB VOID 20150602	2015-06-02 14:02:13	19	0.00	0	0	19
002	GBOK 00211111409	2014-11-11 14:09:10	1	500.00	1	0	0
001	GBOK 00102250942	2014-02-25 09:42:55	3	38.85	3	0	0

Batch Count: 8 Net Amount: \$621.77      Display: 25

Select the correct sale:


MerchantConnect | Support Section | Foreign Exchange Rates | Help | Logout

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User: Robbie Refund  
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Terminal: Demo

Current Batches  
 Settled Batches

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USER

## Settled Activity

Select the batch to review

GBOK 00409230409
Download | Reports | Reports Plus | Search | Filter: All

• 6 items

Seq#	User ID	Tran Status	Card Type	Tran Type	Tran Date	Tran Time	First Name	Last Name	Card Data	Entry Type	AVS Code	CVV2 Code	Total Amount
	TestUser	Settled	Credit Card	Force	09/22/2015	16:53			52*****2705	K			5.00
000	TestUser	Settled	Credit Card	Sale	09/22/2015	16:36			47*****3065	K	D	M	11.85
000	TestUser	Settled	Credit Card	Sale	09/22/2015	16:30			47*****3065	K	D	M	11.85
000	TestUser	Settled	Credit Card	Sale	09/22/2015	11:48			43*****3236	K	U	N	10.00
000	TestUser	Settled	Credit Card	Sale	09/22/2015	09:19			42*****9105	K	D	P	9.29
000	TestUser	Settled	Credit Card	Sale	09/22/2015	07:30			47*****3065	K	D	M	11.85

Transaction Count: 6 Net Amount: \$ 59.84      Display: 25

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Review the data to ensure it is the correct sale to refund. Press Generate Refund.



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[MerchantConnect](#) | [Support Section](#) | [Foreign Exchange Rates](#) | [Help](#) | [Logout](#)

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User: Robbie Refund  
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Current Batches  
 Settled Batches

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USER

## Settled Batches Main Response

This is the authorization response information. Note that all fields with an asterisk (\*) are required.

### Transaction Detail

**Authorization Results**

User:	TestUser
Payment Type:	CREDITCARD
Transaction Type:	SALE
Transaction ID:	220915A15-7A3B3BD5-4498-4B30-A713-886232DABD00
Date / Time:	09/22/2015 04:36:15 PM
Response:	AA
Message:	APPROVAL
Approval Code:	CVI915
AVS Response:	D
CVV2 Response:	M
Account Balance:	11.85
Tran Reference Number:	922163615
CardHolder IP:	

**Order Section**

Card Number:	<input type="text" value="47*****3065"/>
Expiration Date(MMY):	<input type="text" value="1116"/>
Amount:	<input type="text" value="11.85"/>
Customer Code:	<input type="text" value="0"/>
Sales Tax:	<input type="text" value="0.00"/>
Invoice Number:	<input type="text" value="102243"/>
Issue Points:	<input type="text"/>
Promo Code:	<input type="text"/>
Enrollment:	<input type="text"/>

**Billing Address**

Company:	<input type="text"/>
First Name:	<input type="text"/>
Last name:	<input type="text"/>
Address1:	<input type="text" value="6771"/>
Address2:	<input type="text"/>
City:	<input type="text"/>
State/Province:	<input type="text"/>
Postal Code:	<input type="text" value="53562"/>
Country:	<input type="text"/>
Phone:	<input type="text"/>
Email Address:	<input type="text"/>

**Shipping Address**

Same as billing  Yes

Ship to Company:	<input type="text"/>
Ship to First Name:	<input type="text"/>
Ship to Last name:	<input type="text"/>
Ship to Address1:	<input type="text"/>
Ship to Address2:	<input type="text"/>
Ship to City:	<input type="text"/>
Ship to State/Province:	<input type="text"/>
Ship to Postal Code:	<input type="text"/>
Ship to Country:	<input type="text"/>
Ship to Phone:	<input type="text"/>

You may change the amount field if needed to do a partial refund per your business practices. You may not increase the amount beyond the original authorization. Press Process.



FORMERLY VIRTUAL MERCHANT

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Current Batches  
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USER

## Credit Card Return

Enter the information for this transaction. Note that all fields with an asterisk (\*) are required.

### Return

**Order Section**

<b>Card Number:</b>	47*****3065
<b>Expiration Date(MMY):</b>	<input type="text" value="1116"/>
<b>Amount:</b>	<input type="text" value="11.85"/> *
<b>Customer Code:</b>	<input type="text" value="0"/>
<b>Sales Tax:</b>	<input type="text" value="0.00"/>
<b>Invoice Number:</b>	<input type="text" value="102243"/>
<b>Departure Date(MM/DD/YYYY):</b>	<input type="text"/> <input type="text"/>
<b>Completion Date(MM/DD/YYYY):</b>	<input type="text"/> <input type="text"/>

**Billing Address**

Company:	<input type="text"/>
First Name:	<input type="text"/>
Last name:	<input type="text"/>
Address1:	<input type="text" value="6771"/>
Address2:	<input type="text"/>
City:	<input type="text"/>
State/Province:	<input type="text"/>
Postal Code:	<input type="text" value="53562"/>
Country:	<input type="text" value="Please select a Country"/>
Phone:	<input type="text"/>
Email Address:	<input type="text"/>

**Shipping Address**

Same as billing  Yes

Ship to Company:	<input type="text"/>
Ship to First Name:	<input type="text"/>
Ship to Last name:	<input type="text"/>
Ship to Address1:	<input type="text"/>
Ship to Address2:	<input type="text"/>
Ship to City:	<input type="text"/>
Ship to State/Province:	<input type="text"/>
Ship to Postal Code:	<input type="text"/>
Ship to Country:	<input type="text" value="Please select a Country"/>
Ship to Phone:	<input type="text"/>

**Custom Fields**

Session ID:	<input type="text"/>
Internal Data Dataset:	<input type="text"/>

Similar to a sale you are provided a Return Response and may view a receipt that can then be printed.



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[MerchantConnect](#) | [Support Section](#) | [Foreign Exchange Rates](#) | [Help](#) | [Logout](#)

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User: Robbie Refund  
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USER

Current Batches  
 Settled Batches

- Main
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## Credit Card Return Response

This is the authorization response information. Note that all fields with an asterisk (\*) are required.

**Transaction Detail**

**Authorization Results**

User:	RRefund
Payment Type:	CREDITCARD
Transaction Type:	RETURN
Transaction ID:	280716A15-D86D88AE-A7B6-488B-9144-939A67ED53A7
Date / Time:	07/28/2016 11:23:41 AM
Response:	AA
Message:	APPROVAL
Approval Code:	
ECI:	
Account Balance:	0.00
CardHolder IP:	

**Order Section**

Card Number:	<input type="text" value="47*****3065"/>
Expiration Date(MMYY):	<input type="text" value="1116"/>
Amount:	<input type="text" value="11.85"/> *
Customer Code:	<input type="text" value="0"/>
Sales Tax:	<input type="text" value="0.00"/>
Invoice Number:	<input type="text" value="102243"/>

**Billing Address**

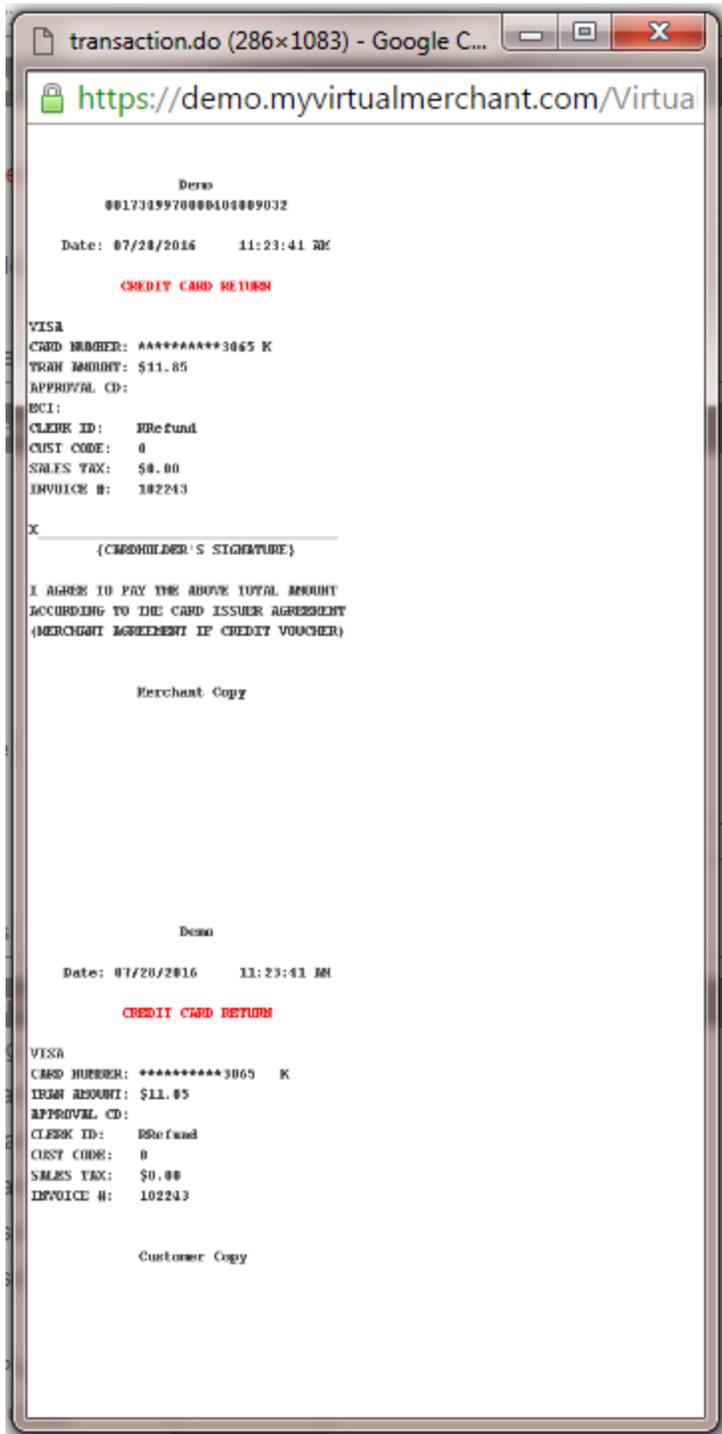
Company:	<input type="text"/>
First Name:	<input type="text"/>
Last name:	<input type="text"/>
Address1:	<input type="text" value="6771"/>
Address2:	<input type="text"/>
City:	<input type="text"/>
State/Province:	<input type="text"/>
Postal Code:	<input type="text" value="53562"/>
Country:	<input type="text" value="Please select a Country"/>
Phone:	<input type="text"/>
Email Address:	<input type="text"/>

**Shipping Address**

Same as billing  Yes

Ship to Company:	<input type="text"/>
Ship to First Name:	<input type="text"/>
Ship to Last name:	<input type="text"/>
Ship to Address1:	<input type="text"/>
Ship to Address2:	<input type="text"/>
Ship to City:	<input type="text"/>
Ship to State/Province:	<input type="text"/>
Ship to Postal Code:	<input type="text"/>
Ship to Country:	<input type="text" value="Please select a Country"/>
Ship to Phone:	<input type="text"/>

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Close out the receipt by clicking the X.

To process another refund click on Main in your left menu.