

Elavon Converge Virtual Terminal Batches 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.

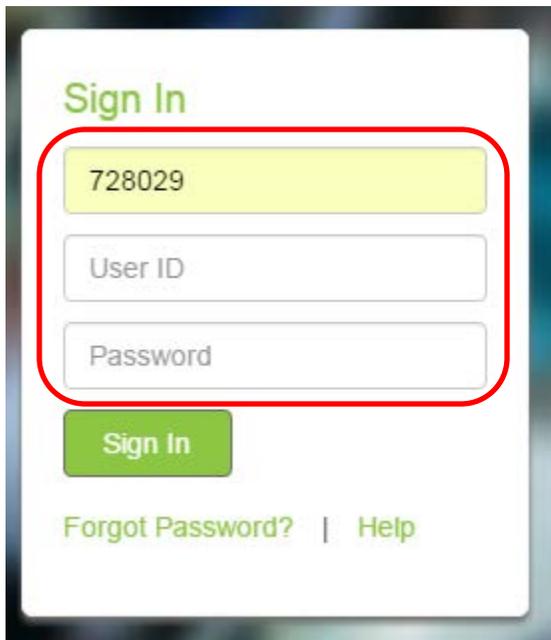
Just like PSU eCommerce, sales may only be conducted on properly secured, segmented workstations. **Only log into Converge to process payments from the secured, segmented workstation.** Later this fall we will be adding encrypting hardware to allow greater flexibility in payment data entry.

This document briefly reviews the screens you will see when settling transactions. If your role includes Refund capability you may also process refunds on your secured, segmented workstation or 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 settlement 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 account credentials 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 links 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.

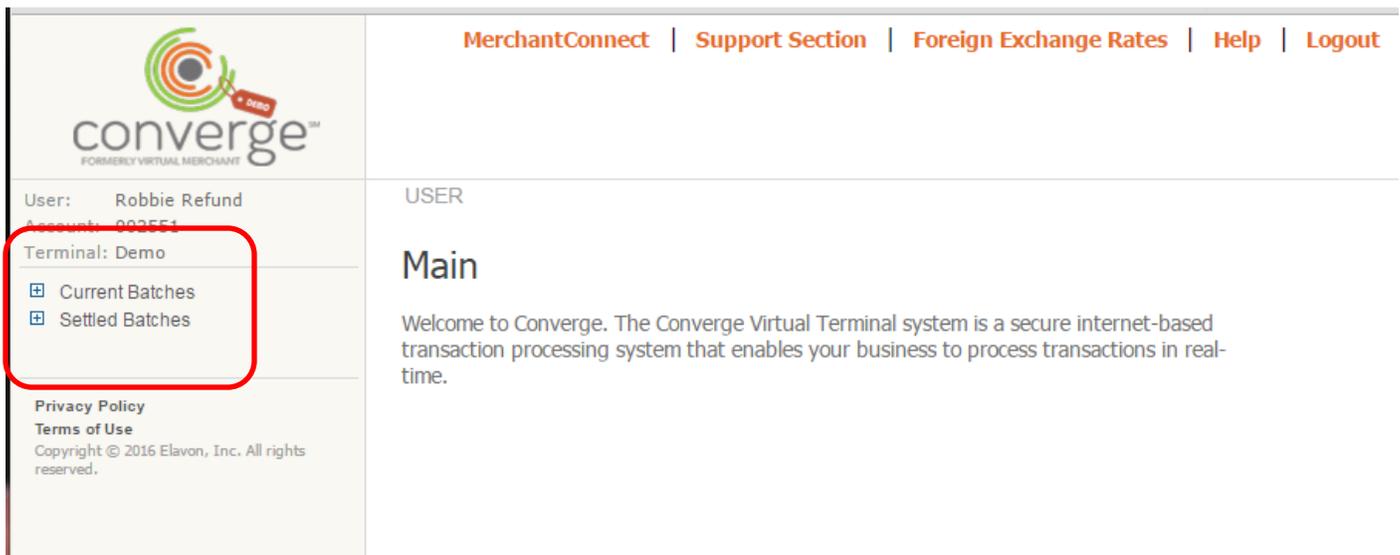


The image shows a 'Sign In' form with a red border. The form contains the following elements:

- A green header 'Sign In'.
- A yellow input field containing the number '728029'.
- A white input field labeled 'User ID'.
- A white input field labeled 'Password'.
- A green button labeled 'Sign In'.
- Links for 'Forgot Password?' and 'Help' at the bottom.

For settlement 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). Many financial settlement staff do not have a secured and segmented workstation thus they are not able to enter the card number. You will not need full card numbers to settle. Even if you have sale capability sales may only be conducted on a properly secured and segmented workstation.**

To view current (today's) transactions click on Current Batches, then Main.



The screenshot shows the user interface of the Convergence Virtual Terminal. The top navigation bar includes links for MerchantConnect, Support Section, Foreign Exchange Rates, Help, and Logout. The left sidebar contains the following information:

- Logo for 'converge' (FORMERLY VIRTUAL MERCHANT).
- User: Robbie Refund
- Account: 003551
- Terminal: Demo
- Menu items: Current Batches, Settled Batches
- Privacy Policy
- Terms of Use
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The main content area displays the user's role as 'USER' and the selected menu item 'Main'. A welcome message reads: 'Welcome to Convergence. The Convergence Virtual Terminal system is a secure internet-based transaction processing system that enables your business to process transactions in real-time.'

You will see current sales. If you click on the truncated card number you will view that transaction detail (not displayed here) that is like the sales/refund response. At the bottom of the page are settlement buttons. You DO NOT need to settle in Converge. Our accounts will settle daily at midnight to keep all transactions aligned with calendar days. The funds will then post to IBIS. These screens may be used to view activity, view/print a customer receipt, process refunds or verify totals with other financial documents.

You may also look at Errors if you are getting customer calls or suspect something is wrong with your transactions.

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

converge™
FORMERLY VIRTUAL MERCHANT

User: Robbie Refund
Account: 002551
Terminal: Demo

USER

Current Batches:

- Current Batches
 - Error
 - Auth Only
 - Recurring
 - Main
 - Credit Card
 - Debit Card
 - Electronic Check
 - Gift Card
 - Loyalty Card
 - Imported Batches
- Settled Batches

Current Batches: Main

Select a transaction to review the authorization details.

Current Open Transactions [Download](#) | [Reports](#) | [Reports Plus](#) | [Search](#) | Filter: All

	User ID	Card Type	Tran Type	Tran Date	Tran Time	First Name	Last Name	Card Data	Entry Type	Total Amount
<input type="checkbox"/>	DevSoftware	Credit Card	Sale	08/05/2016	11:27			40*****0019	K	22.00
<input type="checkbox"/>	DevSoftware	Credit Card	Sale	08/05/2016	11:14			40*****0019	K	22.00

Transaction Count: 78 Net Amount: \$ 256.65 Display: 25

To view prior (to today's) transaction click on Settled Batches, then Main.

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

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FORMERLY VIRTUAL MERCHANT

User: Robbie Refund
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USER

Main

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.

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A listing of your settled batches by day will be displayed. Click on a date to see that day's transactions.



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

User: Robbie Refund
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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](#)

• 10 items

Batch#	Batch Response	Settled Date	Net Count	Net Amount	Number Purchase/Forces	Number Returns	Number Voids
009	GB TEST DROPPED	2016-08-03 11:47:19	17	266.15	16	1	0
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:



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

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

GB TEST DROPPED
[Download](#) | [Reports](#) | [Reports Plus](#) | [Search](#) | Filter:

• 17 items

Seq#	User ID	Tran Status	Card Type	Tran Type	Tran Date	Tran Time	First Name	Last Name	Card Data	Entry Type	AVS Code	CW2 Code	Total Amount
000	DevCHR	Settled	Credit Card	Sale	07/30/2016	13:07			41*****1111	K		U	10.00
000	DevCHR	Settled	Credit Card	Sale	07/30/2016	13:06			41*****1111	K		U	10.00
000	DevCHR	Settled	Credit Card	Sale	07/30/2016	13:04			41*****1111	K		U	10.00
000	DevCHR	Settled	Credit Card	Sale	07/30/2016	12:25			41*****1111	K		U	10.00
000	DevCHR	Settled	Credit Card	Sale	07/30/2016	12:22			41*****1111	K		U	10.00
000	DevCHR	Settled	Credit Card	Sale	07/29/2016	17:11			41*****1111	K		U	10.00
000	DevCHR	Settled	Credit Card	Sale	07/29/2016	17:05			41*****1111	K		U	5.00
000	DevCHR	Settled	Credit Card	Sale	07/29/2016	14:12			40*****4718	K		M	5.00
	RRefund	Settled	Credit Card	Return	07/28/2016	11:23			47*****3005	K			11.85
000	RRefund	Settled	Credit Card	Sale	07/28/2016	11:11			50*****3003	K			23.00
000	SSales	Settled	Credit Card	Sale	07/28/2016	10:53			50*****3003	K			21.00
000	DevDNLaw	Settled	Credit Card	Sale	07/27/2016	22:37			41*****9990	K		M	25.00
000	DevDNLaw	Settled	Credit Card	Sale	07/27/2016	22:10			41*****9990	K		M	135.00
000	DevDNLaw	Settled	Credit Card	Sale	07/27/2016	20:40			41*****9990	K		M	1.00
000	DevDNLaw	Settled	Credit Card	Sale	07/27/2016	11:17			41*****9990	K		M	1.00
000	DevDNLaw	Settled	Credit Card	Sale	07/27/2016	11:15			41*****9990	K		M	1.00
000	DevDNLaw	Settled	Credit Card	Sale	07/27/2016	11:13			41*****9990	K		M	1.00

Transaction Count: 17 Net Amount: \$ 266.15
Display:

If you click on a card number you can view the details of that transaction. See the Refund guide to process a refund.



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FORMERLY VIRTUAL MERCHANT

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- Current Batches
- Settled Batches
 - Main
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 - Loyalty Card

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

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:	CV915
AVS Response:	D
CVV2 Response:	M
Account Balance:	11.85
Tran Reference Number:	922163615
CardHolder IP:	
Order Section	
Card Number:	47*****3065
Expiration Date(MMY):	1116
Amount:	11.85
Customer Code:	0
Sales Tax:	0.00
Invoice Number:	102243
Issue Points:	
Promo Code:	
Enrollment:	
Billing Address	
Company:	
First Name:	
Last name:	
Address1:	6771
Address2:	
City:	
State/Province:	
Postal Code:	53562
Country:	
Phone:	
Email Address:	
Shipping Address	
Same as billing	<input type="checkbox"/> Yes
Ship to Company:	
Ship to First Name:	
Ship to Last name:	
Ship to Address1:	
Ship to Address2:	
Ship to City:	
Ship to State/Province:	
Ship to Postal Code:	
Ship to Country:	
Ship to Phone:	

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