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User Guide MerchantE Payment Acceptance for Magento.

A step-by-step guide to use the MerchantE Payment Acceptance extension for Magento 2.3.x.



Table of Contents

Key	/ Contacts	3
Ext	ension Installation and Configuration	4
1.	Install Magento	4
2.	Download and install the extension	4
3.	Configure the extension	4
4.	Testing the Extension	11
5.	Going Live	17
Detai	led Feature Guide	18
1.	Checkout for Transaction Type: Sale	18
2.	Checkout and Invoice for Transaction Type: Pre-Authorization	22
3.	Refunds (Full and Partial)	24
4.	Manually Entered Transactions	26
5.	Third-Party Checkout Module Support	31
6.	International Currency Acceptance	31
7.	Level II and Level III Processing	32
8.	Recurring and Subscription Payments	34
9.	Account Updater Service	34
10.	Integrated Reporting	34
11.	Get Started	36



Key Contacts

Information/Assistance	Contact Info
After you have set up MerchantE Payment Acceptance in Magento, if you have questions about payments, authorization, declines, settlement and chargebacks, contact MerchantE Customer Care.	help@MerchantE.com
If you have questions during set-up of MerchantE Payment Acceptance, or learning how to use it, contact your MerchantE sales representative.	Your MerchantE Sales Representative
With questions about other MerchantE products and services, contact your MerchantE sales representative. If you don't know who to contact, use the <u>Magento@MerchantE.com</u> mailbox.	Your MerchantE Sales Representative or <u>Magento@MerchantE.com</u>



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Extension Installation and Configuration

Please note that each Magento installation can vary from others; if your screen does not appear exactly the same as the screens pictured here, don't be concerned. The names of tabs and selections should be consistent. If you have any questions along the way, do not hesitate to contact MerchantE (ME) for assistance at <u>Help@merchantE.com</u>.

1. Install Magento

If you have not done so already, download <u>Magento</u> and install according to their instructions. Configure and add products as needed to your eCommerce store.

2. Download and install the extension

Download MerchantE Payment Acceptance extension for Magento v 2.x from the <u>Magento</u> <u>Marketplace</u> (filter "Payments & Security" extensions, search MerchantE).

Follow the instructions for installing a new Magento v 2.x extension.

3. Configure the extension

From the Magento Admin Dashboard, select $\textbf{Stores} \rightarrow \textbf{Configuration}$



Configuration	Q 🏚
Store View: Default Conf	• @ Sa
GENERAL ~	
CATALOG ~	
CUSTOMERS V	
SALES ^	
Sales	
Sales Emails	
PDF Print-outs	
Tax	
Checkout	
Shipping Settings	
Multishipping Settings	
Shipping Methods	
Google API	
Gift Cards	
Payment Methods]

From the Stores Configuration menu, select $\textbf{Sales} \rightarrow \textbf{Payment Methods}$

On the Payment Methods page: scroll down, select "MerchantE" from the list

Ŵ	Configuration		Save Config
DASHBOARD	PDF Print-outs	Braintree	Braintree Accept credit/debit cards and PayPal in your Magento store. Configure No setup or monthly fees and your customers never leave your store to
S SALES	Tax	A PayPai Company	VISA Construction and the second seco
CATALOG	Checkout		OTHER PAYPAL PAYMENT SOLUTIONS: •
CUSTOMERS	Shipping Settings	OTHER PAYMENT METHODS:	
	Shipping Methods	🛇 Klarna	
CONTENT	Google API	amazon	The convenient, trusted way to pay. Let your customers check out in just a few clicks or taps Configure
REPORTS	3D Secure	und pay	using the shipping and payment info already stored in their
STORES	Fraud Protection	⊘ MerchantE	
SYSTEM	Payment Methods		Enabled [website] Yes 💌
FIND PARTNERS & EXTENSIONS	уотро	~	Title Credit Card
	ENGAGEMENT CLOUD	~ s	nez une o depuipe con caracteriore
	SERVICES	~	Transing

3.1 Setup of MerchantE Payment Method

Proceed to configure the extension according to the following instructions and your specific business needs. Field descriptions, defaults, and suggestions are provided below the graphics.

Ŵ	Configuration					Save Config
DASHBOARD	3D Secure		⊘ MerchantE			
\$ SALES	Fraud Protection			Enabled [website]	Yes 🔻	
CATALOG	Payment Methods			Title [website]	Credit Card	
	ΥΟΤΡΟ	~		Sort order	This title is displayed to the customer	
	ENGAGEMENT CLOUD	~	Credentials	[website]		
	SERVICES	~		Profile ID [website]		
	ADVANCED	~			This is a 20 digit merchant identifier issued by a sales representative, certification manager, or from a VAR form.	
				Profile Key [website]	This is a 32 character encoded nass key issued by a sales	
STORES				lines ID	representative, certification manager, or from a VAR form.	
SYSTEM				[website]	This user login ID is used to pull reporting data from the MerchantE web reporting system.	
FIND PARTNERS & EXTENSIONS				User Password [website]		
					This user login password is used with the user login ID to pull reporting data from the MerchantE web reporting system.	
				Use Sandbox [website]	Yes 💌	
					This setting should never be set to Yes in a production environment. The Sandbox is for testing only.	

Enabled – Set to "Yes" to enable this extension as a Payment Method within your Magento installation.

Title– This is the "title" of this particular Payment Method as it appears to the customer during checkout. "Credit Card" is the default and recommended value.

Sort Order– This field allows you to change the order in which this Payment Method Title (e.g., "Credit Card") will be presented among any other enabled Payment Methods.

3.2 Credentials

Profile ID – This is a 20-digit merchant identifier which you will receive from MerchantE when your merchant account has been successfully set up.

Profile Key – This is a 32-character encoded passkey which you will receive from MerchantE when your merchant account has been successfully set up.

User ID – This identification value is used to integrate with the Reporting and Account Updater services and can be obtained from your MerchantE sales or support representative once your merchant account has been successfully set up with MerchantE.

User Password – This credential value is used to integrate with the Reporting and Account Updater services and can be obtained from your MerchantE sales or support representative once your merchant account has been successfully set up with MerchantE.

Use Sandbox – Selecting "Yes" provides <u>simulated</u> authorization responses for integration, testing, and development purposes. To process live transactions in the production environment, select "No." Do not attempt to process live financial transactions when "Use Sandbox" is set to "Yes."

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3.3 Order Settings

Ŵ	Configuration		Save Config
DASHBOARD	Order		
\$ SALES	New Order Status [website]	Processing The status the order is set to when the promet has been	
CATALOG	Transation Tupo	approved.	
CUSTOMERS	ransecution type (velsate) Use Level II/III Processing	Pre-Authorization 🔹	
	(website)	To learn more about Level II/III Processing, see the Level II/III developer documentation	

New Order Status – Select the status that you want to set an order to when the payment has been approved; this field defaults to "Processing," but supports custom Magento statuses. Custom "Order Status" must be associated with the processing state make it available in the configuration. See details in <u>Magento documentation</u>.

Transaction Type – Select either "Sale" or "Pre-Authorization" depending on your type of business, products, and/or ordering model (Note that merchants are responsible for complying with all card brand regulations relating to eCommerce transactions which may require one of these specific Transaction Types to be used. If you aren't sure how you should be processing eCommerce transactions, contact your MerchantE sales or support representative).

Pre-Authorization – used to authorize a card for an amount when an order is placed, but NOT to capture those funds for settlement into your bank account; if an order is pre-authorized, the funds may be captured later within the Magento Orders interface, such as when a product ships.

Sale – used to authorize a card for an amount and immediately capture those funds for settlement to your bank account, as in sale of certain digital goods.

Use Level II/Level III Processing – Select "Yes" to enable support for "Level II" and "Level III", line-item detail processing. This option is for merchants who process B2B and B2G transactions and may qualify those transactions for lower interchange rates on Corporate or Purchasing Cards by providing additional data fields and detailed line-item transaction information. Details of transactions are located in the comments section in the Sales Order detail screen (Admin \rightarrow Sales \rightarrow Orders \rightarrow (select transaction) \rightarrow View).

3.4 Checkout Preferences

Enable Hosted Checkout – when this option is selected to "Yes," the customer is redirected to the MerchantE secure website to enter their sensitive card details to place an Order:

- Your webserver is notified when the customer's transaction is approved.
- The sensitive card details are never passed to your webserver, reducing your scope of PCI DSS compliance requirements.
- Do not use this option if you want to store payment card details for future transactions.
 Stored cards capabilities are provided by the Tokenization methods.
- When this option is set to "No" the customer will be prompted to enter their card details directly on the Magento site, using one of MerchantE Tokenization methods.
- To select a Tokenization Method configuration setting, reference <u>Tokenization Method</u> under <u>3.6 Advanced Settings</u>.

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3.5 Additional Settings

Ŵ	Configuration		Save Config
DASHBOARD	Additional Settings		
\$ SALES	Enable RBS (website)	No	
CATALOG		The MerchantE (ME) Recurring Billing Solution (RBS) is designed to assist clients who process installment or recurring billing, and desire a system to manage and automate processing transactions on a regular basis. Notice: The store is required to have "Enabled Hosted Checkout" set to "No" in order to use RBS.	
CUSTOMERS	Enable AUS (website)	No	
		The MerchantE (ME) Account Updater Service (AUS) helps merchants who do installment, recurring, or on-demand billing obtain updated credit card expiration dates and/or account numbers.	
CONTENT	Force CVV for Saved Cards (website)	No	
REPORTS		Force customers with saved cards to re-enter the CVV code to finish checkout.	
STORES	Client Reference Number (website)	Order #[orderid]	
SYSTEM		This client reference number shows in all MerchantE reporting. Variables include (ip), [orderid], [name], [email], [phone], [company], [customerid]. Example: "Order #[orderid] for [name] [(email])" Default is "Order #[orderid]".	
FIND PARTNERS & EXTENSIONS	Allowed Credit Card Types [website]	VI MC AE	
_		UI	

Enable RBS – **Recurring Billing Service** (RBS) It is recommended that you select "No" as this feature is not compliant with the card brands stored card requirements and you could be subject to non-compliance fees. If you still choose to use this feature, select "Yes." There are additional settings required to enable RBS for applicable products; those steps are described in the "Detailed Feature Guide" later in this User Guide, Section 8 Recurring and Subscription Payments.

Account Updater Service (AUS) helps you avoid declines when you have payment cards on file, such as with subscription-based products or any recurring payments. MerchantE provides an automated service, sending card account information to the card brands on an ongoing weekly basis. The card brands return any updates such as revised expiration dates or new account numbers for cards that were replaced due to expired, lost or stolen cards.

To enable Account Updater Service, set "Use Account Updater Service" to "Yes." This will not function until you have enabled Account Updater Service on your merchant account with MerchantE. Contact a MerchantE sales or support representative for details.

Force CVV for Saved Cards – Select "Yes" if you want to add an additional layer of security and require buyers to re-enter the Card Verification Value (CVV2, also referred to as CID or CVC2) number for each purchase made using a stored card on file. Select "No" to allow stored cards to be used without entering this information.

Client Reference Number – This is a customizable field which can be populated with dynamic Order data elements from Magento which will then appear in your reporting from MerchantE, allowing you to better track and reconcile orders. The following dynamic data elements are supported in this field; you may also enter static values and combine them with these, e.g. "Order #[orderid]".

- [ip] Customer IP address
- [orderid] Magento Order ID



- [name] Customer name from Magento
- [email] Customer email address from Magento
- [phone] Customer phone number from Magento
- [company] Customer company name from Magento
- [customerid] Customer ID from Magento

Allowed Credit Card Types – Select the card brands you accept. Note: this option only controls what is displayed to the customer during checkout; your account with MerchantE must be configured to support these card types. If you aren't sure or have questions, please contact your MerchantE sales or support representatives for assistance.

Ŵ	Configuration		Save Config
2	Allow payments from specific	All Allowed Countries	
SALES	Contrie: [website	Switch this to "Specific Countries" if you want to limit which countries can send you payments.	5
	Payment from specific	Afghanistan	
PRODUCTS	countrie: (website	Åland Islands	
		Albania	
CUSTOMERS		Algeria	
-		American Samoa	
MARKETING		Andorra	
		Angola	
CONTENT			
		Antarcuca	
		Select all countries you want to receive payments from. This only applies if "Allow payments from specific countries" is set to "Specific Countries".	
SYSTEM	Minimum Order Tota		
FIND PARTNERS		The minimum amount an order can be to use this payment method.	
C EXILINGIONS	Maximum Order Tota (vebsite		
		The maximum amount an order can be to use this payment method.	

Allow Payments from Specific Countries – Allow or reject orders from specific countries based on the shipping address entered by the customer.

Payment from Specific Countries – Allow or reject orders from specific countries based on the shipping address entered by the customer.

Minimum Order Total – Minimum amount an order can be for the customer to choose this payment method.

Maximum Order Total – Maximum amount an order can be for the customer to choose this payment method.

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3.6 Advanced Settings

Ŵ	Configuration	Save Config	
CA DASHBOARD	Advanced Settings		
\$ SALES	Tokenization Method [website]	Permanent Tokens Only Temporary or Permanent Tokens Only Installments/Prepayments Only	

Tokenization Method – Tokenization enables merchants to accept and submit payment card transactions for payment processing without transmitting or storing sensitive credit card account details. The payment card data is replaced with a unique alphanumeric token recognized only by the Payment Gateway that created it, making it worthless in the event of a breach. In Magento, merchants can select from three token options:

Permanent Tokens Only – By selecting this option, when the customer inputs their credit card details, MerchantE will automatically generate a <u>permanent</u> token, and that token will be stored for future use. This configuration supports both the Hosted Checkout and the non-Hosted Checkout options.

Temporary or Permanent Tokens Only – By selecting this option, MerchantE will initially generate a temporary token. The merchant (and cardholder) can select to save the payment card data for future use:

- 1. If the customer chooses "YES" when prompted to save their card during the transaction, the temporary token that was used during authorization is provided to the merchant to be stored and used as a permanent token.
- 2. If the customer chooses "NO" when prompted to save their card during the transaction, the temporary token is not saved for future use.

Installments/Pre-payments Only – This security setting allows for merchants to process installments or pre-payments using MerchantE Permanent tokens.

Please contact a MerchantE sales or support representative if you need assistance with understanding which options to select.

Ŵ	Configuration		Save Config
CAA DASHBOARD	Use a cURL Proxy [website]	No This setting should only be enabled if you	×
\$ SALES	Proxy URL	require the use of a cURL proxy.	
CATALOG	[website]	The HTTP proxy to tunnel requests through Only use this if your hosting requires a cUR	L
CUSTOMERS	Disable SSL [website]	No	•
		This setting should only be enabled in a development or testing environment. Disab "Verify Peer" and "Verify Host" in cURL.	oles
	Debug Mode [website]	Yes	•
REPORTS		written to var/log.	1011

3.7 Configuration Complete

After changing configuration options, it is always recommended that you clear cache and rebuild indexes. Magento has guidance to assist you:

Clear cache: <u>http://docs.magento.com/m2/ce/user_guide/system/cache-management.html</u> Rebuild indexes: <u>http://docs.magento.com/m2/ce/user_guide/system/index-</u> management.html

Now you should test your configured extension, as described in the following section.

4. Testing the Extension

Before beginning your testing, always clear cache and rebuild indexes. Navigate to your Magento storefront, purchase a product, and proceed to checkout.



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Searce Se	h entire store here Q	<u>ک</u>
Shipping Review & Payments Shipping Address Email Address Tou can create an account after checkout. First Name *	mmary t	
Shipping Review & Payments Shipping Address Email Address Torder Su I litem in Car First Name *	mmary t	
Shipping Address Email Address Order Su Tou can create an account after checkout. First Name *	mmary	
Email Address * Order Su Tou can create an account after checkout. First Name *	mmary t	
Image: State of State	t	
You can create an account after checkout.	t	
First Name *		~
First Name *		
Last Name *		
Company		
Street Address *		
City *		
State/Province *		
Please select a region, state or province. \checkmark		
Zip/Postal Code *		
Country *		
Phone Number *		
0		
Shipping Methods		
© \$5.00 Fixed Flat Rate		
S10.00 Table Rate Rest Way		
a state west they		

4.1 If You Selected "Yes" for Hosted Checkout

If you have enabled "Hosted Checkout" as your PCI Compliance scope reduction option in the Payment Method configuration page, the screens below illustrate the checkout flow. **NOTE:** To test "Hosted Checkout," your testing environment must be connected to the internet, otherwise an error will occur.



Shipping Review & Payments		
Payment Method:		
Check / Money order	Order Summary	
	Cart Subtotal	\$57.00
Credit Card	Shipping	\$5.00
My billing and shipping address are the same	The full of the d	
Derik Richards	Order Total	\$62.00
3475 Lenox Rd NE,Ste 500	1 literar in Cost	
Atlanta, Georgia 30326	1 Item in Cart	~
United States		
555555555	Ship To:	di la
You will be redirected to a secure payment page to complete your purchase after you place your order.		
Place Order	Derik Richards	
	3475 Lenox Rd NE,Ste 500	
	Atlanta, Georgia 30326	
Apply Discount Code 🗸	United States	
	555555555	
Apply Gift Card 🗸	Shipping Method:	de
	Flat Rate - Fixed	

After selecting "Place Order", the following screen will appear. Press "Begin Payment" to initiate the Hosted Checkout process.

🚫 LUMA	Search entire store here	Q	1
What's New Women Men Gear Training Sale Gift Cards			
Home > Checkout > Finish Payment Finish your Payment			
Your order has been placed. Your order number is #000000041.			
This order has not been paid for yet. To begin paying, please click the button below. Begin Payment			

The following page will display while the Hosted Checkout page is being opened in a new window or tab. (Note: if the payment tab does not open, ensure you have disabled popup-blockers in your browser. If a popup or new tab appears but does not redirect to the Hosted Checkout page and/or redirects back to your Magento storefront, ensure that you have entered valid Profile ID and Profile Key values in the Payment Method configuration screen).



The Hosted Checkout Page will open in

a new tab or window. (You can customize the appearance of this hosted page to match your website, including customized images and style sheets. For further assistance, contact your MerchantE sales or support representatives or Help@merchantE.com.

Enter a test card value such as 411111111111111 (Do not use live cards in the test/sandbox environment!), any date in the future as the expiration, and 123 as the Security Code. The address information should have been pre-populated with your Magento Order information. Press "Submit."

The adjacent payment confirmation page will appear:

The popup window may then be closed, and the original Magento store page will then update with the screens that follow (allow for up to 1 minute from the Secure Checkout Page confirmation.



🚫 LUMA	Search entire store here Q
What's New Women Men Gear Training Sale Gift Cards	
Home > Checkout > Finish Payment Finish your Payment	
Your payment has been verified. You will redirected shortly	



4.2 If You Selected "No" for Hosted Checkout

If you did not enable the Hosted Checkout method on the Payment Method configuration page, the checkout flow will appear as pictured below.

After the Order details are confirmed, as illustrated before, then the card data may be entered directly into the checkout page in the "Review & Payments" tab.

		Sigr
0	Search entire store he	re Q
Shipping Review & Payments		
ayment Method:		
Credit Card	Order Summary	
My billing and shipping address are the same	Cart Subtotal	\$57.00
Derik Richards	Shipping Flat Rate - Fixed	\$5.00
3475 Lenox Rd NE,Ste 500 Atlanta, 30326	Order Total	\$62.00
555555555	1 Item in Cart	~
Edit		
	Ship To:	1
Credit Card Number *	Derik Richards	
	3475 Lenox Rd NE,Ste 500	
Expiration Date *	Atlanta, 30326	
Month v Vear v	555555555	
Card Verification Number *	Shipping Method:	1
Place Order	Flat Rate - Fixed	

Enter any test card value such as 4111111111111111 (Do not use live cards in the test/sandbox environment!), input any date in the future as the expiration, and enter "123" as the Card Verification Number.

- Press "Place Order."
- After the authorization (or sale) has been successfully approved by the MerchantE transaction simulator, you will see the following confirmation page.

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What's New Women Men Gear Training Sale Gift Cards
Thank you for your purchase!
Your order # is: 000000043.
We'll email you an order confirmation with details and tracking info.
Continue Shopping
You can track your order status by creating an account.
Email Address: drichards@merchante-solutions.com
Create an Account

4.3 Verify Sale Orders in Admin

You can verify the Sales Order details by logging in to your Magento Admininterface. From the Admin Dashboard, select **Sales** \rightarrow **Orders**

Û	Sales ×					System Messages: 🛕 1
DASHBOARD						Q 📫 🕺 mes 🕶
\$ SALES	Orders	0				Reload Data
	Invoices					
PRODUCTS	Shipments		Chart is disable	d. To enable the chart, click h	nere.	
CUSTOMERS	Credit Memos					
	Returns		\$0.00	^{Tax} \$0.00	shipping \$0.00	Quantity 1
ē	Billing Agreements					
CONTENT	Transactions		Bestsellers	Most Viewed Products	New Customers	Customers
11.		Total				

You will then see the list of your recent test transactions. To see more details associated with any transaction, click "View."

Ŵ	Ord	ers							q 📣 .	💄 mes 🗸
DASHBOARD							G	o to Archive	Create New	Order
\$ SALES										
٩	Searci	h by keyword		Q		Filters	• Defa	ult View 👻 🛱 Co	olumns 👻 📩	Export •
PRODUCTS	Action	ns 🔻	18 records fo	ound			20 🔻	per page <	1 0	f1 >
				W						
		ID †	Purchase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Action
	M	000000020	Main Website Main Website Store Default Store View	Oct 05, 2017, 2:33:32 AM	Derik Richards	Derik Richards	\$50.00	\$50.00	Processing	View
REPORTS STORES		000000019	Main Website Main Website Store Default Store View	Oct 05, 2017, 0:05:08 AM	Derik Richards	Derik Richards	\$62.00	\$62.00	Closed	View
SYSTEM SYSTEM SYSTEM SYSTEM FIND PARTNERS & EXTENSIONS		00000018	Main Website Main Website Store Default Store View	Oct 04, 2017, 23:58:20 PM	Derik Richards	Derik Richards	\$80.00	\$80.00	Pending Payment	View

View Order details: scroll down to view specific processing details from the transaction, including the MerchantE Transaction ID, the approval code from the card issuer, as well as the CVV and AVS response codes and messages.

00000015				Q 📫 上 mes
			← Back	Send Email Reorder
DRDER VIEW	Order & Account Informat	ion		
Information	Order # 000000019 (The ord sent)	er confirmation email was	Account Information	
			Customer Name	Gui
Involces	Order Date	OCE 5, 2017, 12:05:08 AM	Email	
	Order Status	Closed	Customer Group	NOT LOGGED
Credit Memos	Purchased From	Main Website Main Website Store		
Shipments		Detault store view		
	Placed from IP			
Comments History				
Transactions	Address Information			
Transactions	Address Information		Shipping Address Edu	
Transactions	Address Information Billing Address Edu Dati Bibling		Shipping Address Edit	
Transactions	Address Information Billing Address Edu Derik Richards		Shipping Address Edit Derik Richards	
Trensections	Address Information Billing Address Edu Deric Richards Merchants Order Richards		Shipping Address Edit Derik Richards Merchant e-Solutions 34/3 Lence Rd NF	
Trensactions	Address Information Billing Address Edu Derik Richards Merchant #-Solutions 3475 Lenox Rd NH Str. 500		Shipping Address Edit Derik Richards Merchart E-Solutions 34/5 Lenox Rd NF Ste 500	
Transactions	Address Information Billing Address Edit Derit Richards Merchenti + Solutions 14/7 J. Lenox Rid MH Sto 500 Allanta, Ceorgia, 30325		Shipping Address Edit Derik Richards Merchardt e-Solutions 14/2 Lonox RI NH Sto 500 Allartia - Georgia, 30326	
Transactions	Address Information Billing Address Edit Derik Richards Merchent e-Solutions S475 Lenox RI MF Sto 500 Allanta, Corgia, 30326 United States		Shipping Address Edit Derik Richards Merchank e-Solutions 147.4 Lemok Rd NF Sro 500 Autanus, Georgia, 30326 United States	
Transactions	Address Information Billing Address Edit Derik Richards Merchenti + Solutions 1847/s Lenox Rid MH Sec 500 Adamta, Ceorgia, 30226 United States T: 555555555		Shipping Address Edit Derik Richards Merchant e-Soutions 14/3 Lonox RI NH Sto 500 Allanta, Georgia, 30326 United States T: 555555555	
Transactions	Address Information Billing Address Edit Deris Richards Merchantic Solutions 547/1 Cronx Rid Mer Sol 500 Address Solutions TrissSSSSSSS Payment & Shipping Meth	od	Shipping Address Edit Derik Richards Merchantic-Soutions 14/23 Immo Kit Me Ste 800 Ceergia, 30326 United State T: 555555555	
Transactions	Address Information Billing Address Edit Derik Richards Merchantic Solutions 58 470 Lenox Rid Web Sec 500 Address	od	Shipping Address Edit Derik Richards Merchant e-Soutions 194 Stown Richard Postanta Georgia 20325 United States T: 555555555 Shipping & Handling Informa	tion
Transactions	Address Information Billing Address Edit Derit Richards Merchant + Solutions 547/1 clone Rid Me Se 500 Adamta, Ceorgia, 30326 United States T: 555555555 Payment & Shipping Meth Payment Information Credit Card	od	Shipping Address Edit Derik Richards Merchant e-Soutions 14/2 Tomos Rit M- Sto 500 Atlantis Georgia, 30326 United States T: 555555555 Shipping & Handling Informa Flat Rate - Fixed 5:00	tion
Transactions	Address Information Billing Address Edu Derix Richards Merchanti + Solutions 347/1 crows Rid We See 500 Adminest States Tr. 555555555 Payment & Shipping Meth Payment Information Credit Card	od	Shipping Address Edit Derik Richards Merchardt e-Soutions 149 Soutions 149 Soutions	tion
Transactions	Address Information Billing Address Edit Deric Richards Merchanti + Solutions 54/7/ Lenox Rith He See 500 Adamta, Ceorgia, 20225 United States T: 555555555 Payment & Shipping Meth Payment Information Credit Card Type: Credit Card States:	od Vita xxxx1111	Shipping Address Edit Derik Richards Merchant e-Soutions 14/2 Timok Ri Me Ste Soo Address Soo Address Soo Merce Soo F. 555555555 Shipping & Handling Informa Flat Rate - Fixed S1.00	tion

5. Going Live

When you have tested your new payments configuration and are ready to begin using it, you must revisit the settings described earlier and reset the "Use Sandbox" field to "No."

From Admin Dashboard, select Stores \rightarrow Configuration \rightarrow Sales \rightarrow Payment Methods. Scroll down to your MerchantE settings and look for "Use Sandbox" in the "Credentials" section. (For step-by-step screenshots, <u>click here</u>).

- Change the "Use Sandbox" option to "No" (To revisit the screenshot of this section, <u>click</u> <u>here</u>).
- If MerchantE has provided any new credentials (Profile ID, Profile Key, User ID, Password) for processing "live" transactions in your production merchant account, update those in the "Credentials" section.
- Save changes by pressing "Save Config" button.

Note: Authorization logs are only available when "Use Sandbox" is set to "Yes" and are saved to the /var/log directory within your root Magento installation.

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Detailed Feature Guide

1. Checkout for Transaction Type: Sale

If you must revisit the If you set Transaction Type to "Sale" in the Payment Method configuration screens, then purchases on your website will be authorized and captured for settlement simultaneously. If you set Transaction Type to "Pre-Authorization," then the amount will only be pre-authorized and held on the customer's card when they check out and must be captured (invoiced) later in the Admin Order interface. Regardless of how you set Transaction Type, the customer checkout experience is the same.

Customer adds product(s) to cart.



Customer proceeds with checkout.



If you enabled Hosted Checkout as your PCI Compliance scope reduction option in the Payment Method configuration screen, then the checkout flow will appear as follows. The customer selects "Credit Card," then "Place Order", then "Begin Payment"

Shipping Review & Payments		
Payment Method:		
Check / Money order	Order Summary	
	Cart Subtotal	\$57.00
Credit Card	Shipping Flat Rate - Fixed	\$5.00
My billing and shipping address are the same	Order Total	\$62.00
3475 Lenox Rd NE Ste 500	order rotar	402.00
Atlanta, Georgia 30326	1 Item in Cart	~
United States		
555555555		
You will be redirected to a secure payment page to complete your purchase after you place your order.	Ship To:	Car.
Place Order	Derik Richards	
	Atlanta Georgia 30326	
Apply Discount Code 🗸	United States	
	555555555	
Apply Gift Card 🗸		
	Shipping Method:	Or a
	Fire Date - Fixed	

Customer will see the following page while the Hosted Checkout page is opening in a new tab.

O LUMA	Search entire store here 🔍 🐂
What's New Women Men Gear Training Sale Gift Cards	
Home > Checkout > Finish Payment	
Finish your Payment	
Your order has been placed. Your order number is #000000041.	
Please complete and submit your payment information on the new window. After you complete your payment, you ca payment has been verified.	n close the popup. This page will automatically update when your
Please complete and submit your payment information on the new window. After you complete your payment, you ca payment has been verified. Please allow up to 1 minute for your order status to update after you submit your payment.	n close the popup. This page will automatically update when your
Please complete and submit your payment information on the new window. After you complete your payment, you ca payment has been verified. Please allow up to 1 minute for your order status to update after you submit your payment. Current Order Status: Pending Payment ©	n close the popup. This page will automatically update when your



1.1 Hosted Checkout Set to "Yes"

The Hosted Checkout Page will open in a new tab or window. (Note that you can customize the appearance of this hosted page to match your website.

	Card Information
Tran Type	Sale
Tran Amount	\$62.00
Currency Code	USD
Account Number	
Expiration Date	01 - January ¥ 2018 ¥
Security Code	
	Billing Information
Billing Address	3475 Lenox Rd NE Ste 500
Billing Zip Code	30326
	Submit
	Cancel

The customer enters their card number, expiration date, and card security code. The address information will have been pre-populated with their order information from Magento. Customer presses "Submit."

The following payment confirmation page will appear:

Transa	action Result
Date/Time	02/12/2018 2:49:57 PM
Transaction Type	Sale
Transaction Amount	62.00
Currency Code	USD
Approval Code	T8306H
Invoice Number	123456
Reference Number	-
Card 1	Information
Account Number	4111110000001111
Billing Address	3475 Lenox Rd NE Ste 500
Zip Code	30326
Mercha	ant Home Page
Pri	int Record

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The popup window may then be closed, and the original Magento store page will then update with the screens that follow (allow for up to 1 minute from the Secure Checkout Page confirmation):



1.2 Hosted Checkout Set to "No"

If you did not enable the Hosted Checkout method during configuration, the checkout flow will appear as described below.

After the customer confirms the Order details, they enter their card data directly into the checkout page.



✓			
Shipping Review & Payments			
ayment Method:			
Credit Card		Order Summary	
My billing and shipping address are the same		Cart Subtotal	\$57.00
Derik Richards		Shipping Flat Pata Fixed	\$5.00
3475 Lenox Rd NE,Ste 500		Flat Rate + Fixed	
Atlanta, 30326		Order Total	\$62.00
555555555		1 Item in Cart	~
Edit			
VISA North Discover		Ship To:	ø
Credit Card Number *		Derik Richards	
		3475 Lenox Rd NE,Ste 500	
Expiration Date *		Atlanta, 30326	
Month V Year V		555555555	
Card Verification Number *		Shipping Method:	8
	Place Order	Flat Rate - Fixed	

After the authorization (or sale) has been successfully approved by the card issuer, the customer is directed to a confirmation page

🚫 LUMA	Search entire store here	Q,	Ì
What's New Women Men Gear Training Sale Gift Cards			
Thank you for your purchase!			
Your order # is: 000000043. We'll email you an order confirmation with details and tracking info. Continue Shopping			
You can track your order status by creating an account. Email Address: drichards@merchante-solutions.com			
Create an Account			

2. Checkout and Invoice for Transaction Type: Pre-Authorization

If you set Transaction Type to "Pre-Authorization" in the Payment Method configuration screens, then purchases on your website will only be pre-authorized and held on the customer's card when they check out, and must be captured (invoiced) later in the Admin Order interface in order for you to receive funds. Regardless of how you set Transaction Type, the customer checkout experience is the same as previously shown. If you selected Pre- Authorization, however, the below steps are necessary to create an Invoice within Magento and capture the pre-authorization for actual settlement.

From the Admin Dashboard, select **Sales** \rightarrow **Orders**

- Find the Pre-Authorization Order which needs to be captured, and click "View"
- Click the "Invoice" option at the top

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#00000020							Q 📫	-
		← Back Ca	ncel Send Er	nail Hold	d Invo	ice Shi	p Reorder	
ORDER VIEW	Order & Account Inf	ormation						
Information	Order # 00000020 (Ti sent)	he order confirmatio	on email was	Account	t Informat	ion		
Implicat	Order Date	Oct 5,	2017, 2:33:32 AM	Custome	er Name		no Qaustomor a	Derik
imates	Order Status		Processing	Email		nan	ne@customer.c	om
Credit Memos	Purchased From	м	Main Website ain Website Store	Custome	r Group			
Shipments		D	efault Store View					
Comments History	Address Information	1						
Transactions	Billing Address Edit			Shippin	g Address	Edit		
	Derik Richards Merchant e Solutions 3475 Lenox Rd NE Ste 500 Atlanta, Georgia, 30326 United States			Derik Rich Merchant 3475 Leno Ste 500 Atlanta, Ge United Sta	ards e-Solutions ix Rd NE eorgia, 30326 ites			
	Payment & Shipping	g Method						
	Payment Information			Shippin	g & Handl	ng Informa	tion	
	Credit Card			Flat Rate	- Fixed \$5.00			
	Credit Card Type:		Visa					
	Credit Card Type: Credit Card Number:		Visa xxxx-1111					
	Credit Card Type: Credit Card Number: The order was placed using U	/SD.	Visa 2000-1111					
	Credit Card Type: Credit Card Number: The order was placed using U Items Ordered	JSD.	Visa 3000-1111					
	Credit Card Type: Credit Card Number: The order was placed using U Items Ordered Product Rem	JSD. Original 25 Price	Visa xxxxe-1111 Price Qty	Subtotal	Tax Amount	Tax Percent	Discount Amount	;

The New Invoice screen will appear.

Ensure that the "Amount" drop down on the Invoice is set to "Capture Online" and click "Submit Invoice."

Ŵ	New Invoice							← Back	Reset
DASHBOARD	Payment & Shipping I	Method							
\$ SALES	Payment Information Credit Card				Shipping I Flat Rate - Fi	nformation			
PRODUCTS	Credit Card Type:			Visa	Total Shippin	g Charges: \$5.00 hipment			
CUSTOMERS MARKETING	Credit Card Number: The order was placed using US	iD.		xxxx-1111					
CONTENT	Items to Invoice								
ıl.	Product	Price	Qty	Qty to Invoice	Subtotal	Tax Amount	Discount Amount	Row Tota	d.
STORES SYSTEM	Erika Running Short SKU: WSH12-28-Green Size: 28 Color: Green	\$45.00	Ordered 1	1	\$45.00	\$0.00	\$0.00	\$45.00	
FIND PARTNERS & EXTENSIONS	Order Total		obserce diff a						
					Investor To	+-1-			
	Invoice Comments				invoice to	cais			645.00
					Shipping &	Handling			\$5.00
				Å	Grand Tota Amount	1			\$50.00
					Capture On Append O	Comments			
					Email Co	py of Invoice			
								Submit Ir	voice



The confirmation message will appear.

DASHBOARD	#00000019				(Q 💋	💄 mes 🗸
\$ SALES		← Ba	ck Send Email	Credit Memo	Hold	Ship	Reorder
PRODUCTS							
CUSTOMERS	The invoice has been created and the invoice has been created a	ated.					
	ORDER VIEW	Order & Accour	t Information				
	Information	Order # 0000000 confirmation em	19 (The order ail was sent)	Account	Informatio	'n	
	Invoices	Order Date	Oct 5, 2017, 12:05:08 AN	Custome Name	r		Guest
		Order Status	Processin	g Email		drichards s	@merchante- olutions.com
STORES	Credit Memos	Purchased From	Main Websit Main Website Stor Default Store Viev	e e v		40	T LOGGED IN
SYSTEM	Subucus	Placed from IP	24.255.8.10	2			

3. Refunds (Full and Partial)

To issue a refund for an existing Order:

- From Admin Dashboard, select Sales \rightarrow Orders
- The list of orders will appear. Select the Order to be refunded (Note: The Order must have a corresponding Invoice; if you set Transaction Type to "Sale" then all orders will automatically have an invoice; if you set Transaction Type to Pre-Authorize, then you must first issue an invoice for that order before you can refund it).
- Select "Invoices" from the left-hand menu.

I								Syster	n Messages	a 🛕 1
DASHEDARD	#00000019							Q	0	mes 🕶
\$ SALES			÷	Back Senc	l Email	Credit Memo	Hold	Ship	Ree	order
PRODUCTS										
CUSTOMERS	ORDER VIEW	Search	h by keyword	Q	Filters	Default Vi	ew • 🗘	Columns	• ±	Export 🔹
	Information	Action	ns 💌 1	records found		20 • p	er page	<	1 of	1
CONTENT	Invoices		Invoice 1	Invoice Date	Order #	Order Date	Bill-to Name	Status	Amount	Action
REPORTS	Credit Memos		000000008	Oct 5, 2017 2:14:25 AM	000000019	Oct 5, 2017 12:05:08 AM	Derik Richards	Paid	\$62.00	View
STORES	Shipments									
SYSTEM	Comments History									
IND PARTNERS & EXTENSIONS	Transactions									

 Click the "Credit Memo" link at the top (Note: this button will only appear if an Order has been invoiced, i.e., a pre-authorization has been captured if you selected the Pre-Authorization Transaction Type in the Payment Method configuration).

I				System Messages: 🛕 1
CA DASHBOARD	#00000008			Q 📫 🕺 mes 🗸
\$ SALES			← Back Send Email	Credit Memo Print
PRODUCTS	Order & Account Information			
	Order # 000000019 (The order con sent)	firmation email was	Account Information	
	Order Date	Oct 5, 2017, 12:05:08 AM	Customer Name	Guest
CONTENT	Order Status	Processing	Email	name@customer.com
d.	Purchased From	Main Website	Customer Group	NOT LOGGED IN
REPORTS				
STORES	Placed from IP	11.111.1.111		
	Address Information			
IND PARTNERS R EXTENSIONS	Billing Address Edit Derik Richards Merchant e-Solutions 3475 Lenox Rd NE Ste 500 Atlanta, Georgia, 30326 United States T: 555555555		Shipping Address Edit Derik Richards Merchant e-Solutions 3475 Lenox Rd NE Ste 500 Atlanta, Georgia, 30326 United States T: 555555555	
	Payment & Shipping Method			
	Payment Information		Shipping Information	
	Credit Card		Flat Rate - Fixed Total Shipping Charges: \$5.00	
	Credit Card Type:	Visa		
	Credit Card Number:	xxxx-1111		
	The order was placed using USD.			

You will then be presented with the Credit Memo screen (below). Here you may make any adjustments, such as whether to refund shipping fees, or charge restocking or other fees potentially resulting in only a partial refund to the cardholder. Press the "Refund" button to issue the refund. A confirmation of the refund/credit memo will appear:



	01 #0	000000	80				← Bac	k Re
Payment Informa	ition				Shipping Infor Flat Rate - Fixed	mation		
Credit Card Type:			Vis	a	Total Shipping Char	ges: \$5.00		
Credit Card Number:			xxxx-111	1				
The order was placed u	using USD.							
Items to Refund								
Product	Price	Qty	Return to Stock	Qty to Ref	und Subtotal	Tax Amount	Discount Amount	Row To
Mona Pullover Hoodlie SKU: WH01-XS-Green Size: XS Color: Green	\$57.00	Ordered 1 Invoiced 1		1	\$57.00	\$0.00	\$0.00	\$57.00
			Update Qty's					
Order Total								
Order Total Credit Memo Com	nments				Refund Totals			
Order Total Credit Memo Com Comment Text	nments				Refund Totals			\$5
Order Total Credit Memo Com ^{Comment Text}	nments				Refund Totals Subtotal Refund Shipping			\$5
Order Total Credit Memo Con Comment Text	nments			4	Refund Totals Subtotal Refund Shipping Adjustment Refur	nd		5
Order Total Credit Memo Corr Comment Text	nments			4	Refund Totals Subtotal Refund Shipping Adjustment Refur	nd		55
Order Total Credit Memo Com Comment Text	nments			<u>"</u>	Refund Totals Subtotal Refund Shipping Adjustment Refur Adjustment Fee	nd		5
Order Total Credit Memo Con Comment Text	nments			<i>k</i>	Refund Totals Subtotal Refund Shipping Adjustment Refur Adjustment Fee Grand Total	ıd		55 5 0 0 5
Order Total Credit Memo Con Comment Text	nments			4	Refund Totals Subtotal Refund Shipping Adjustment Refur Adjustment Fee Grand Total	nd		55 5 0 0 56
Order Total Credit Memo Com Comment Text	nments			<u>i</u>	Refund Totals Subtotal Refund Shipping Adjustment Refur Adjustment Fee Grand Total Append Comm	nd ents irredit Memo		\$5 5 0 \$6

4. Manually Entered Transactions

When you need to accept a card payment over the phone but would still like the order to be integrated to your Magento workflow, use this feature.

- From Admin Dashboard, select Sales \rightarrow Orders
- Press "Create New Order" button.



DASHBOARD	Ord	ers						(λ 🕫	上 mes 🕶
\$ SALES							Go	o to Archive	Create New	Order
PRODUCTS										
	Searci	h by keyword		Q		Filters	 Default 	:View 🔹 🏠 Col	umns 👻 📩	Export •
	Action	ns 🔻	17 records fo	und			20 🔻	per page 🛛 🔇	1 0	f1 >
CONTENT		ID †	Purchase Point	Purchase Date	Bill-to Name	Ship-to Name	Grand Total (Base)	Grand Total (Purchased)	Status	Action
		000000019	Main Website Main Website Store Default Store View	Oct 05, 2017, 0:05:08 AM	Derik Richards	Derik Richards	\$62.00	\$62.00	Closed	View
SYSTEM		00000018	Main Website Main Website Store Default Store View	Oct 04, 2017, 23:58:20 PM	Derik Richards	Derik Richards	\$80.00	\$80.00	Pending Payment	View
FIND PARTNERS & EXTENSIONS		000000017	Main Website Main Website Store Default Store View	Oct 04, 2017, 23:55:54 PM	Derik Richards	Derik Richards	\$62.00	\$62.00	Pending Payment	View

- Select an existing customer or create a new one.

DASHBOARD	Create	e N	ew Orde	er in Default S	tore Viev	N		Q 💋	👤 mes 🗸
\$ SALES									← Back
PRODUCTS									
CUSTOMERS	Please s	elec	t a custome	r				Create N	lew Customer
MARKETING	Search	Re	set Filter	3 records found			20 💌 per page	< 1	of1 >
CONTENT	ID	t	Name	Email	Phone	ZIP/Post Code	Country	State/Province	Signed-up Point
REPORTS							All Countries 💌		
STORES	3		Derik Richards	<u>derik@customer.com</u>	555 555 5555	30326	United States	Georgia	Default Store View
SYSTEM	2		Jacob Smith	jacob@customer3.com					Default Store View
EIND PARTNERS	1		Veronica Doe	veron@customer2.com	555 555 5555	49628-7978	United States	Michigan	Default Store View

 Add Products to the Order and complete the other required Order details (e.g. Billing/Shipping Addresses).

0	Create New Order in Def	ault Store	View				Q	📫 上 mes 🗸
DASHBOARD							Cancel	Submit Order
\$ SALES								-
PRODUCTS		Items Orde	red				Add Products By SKU	Add Products
		Product	Price	Qty	Subtotal	Discount	Row Subtotal	Action
MARKETING		No ordered items	ł					
CONTENT		Account Inf	ormation					
REPORTS		* Group	Email				7	
STORES		General	•					
SYSTEM		Address Inf	ormation					
EIND PARTNERS		Billing Addre	ess			Shipping	Address	

- In the Payment Method section, select "Credit Card" (or the "Title" you assigned to this extension Payment Method).
- If you configured the Payment Method as "No" for "Hosted Checkout" as your method of PCI scope reduction, you can directly input the card details as shown below. When complete, click "Submit Order".

Ŵ	Create New Order for Derik Richards i	Cancel Submit Order
CASHBOARD	Payment & Shipping Information	
\$ SALES	Payment Method	Shipping Method
PRODUCTS	Credit Card Credit Card Type	Get shipping methods and rates
CUSTOMERS	Visa 🔹	
	411111111111	
CONTENT	* Expiration Date	
REPORTS	* Card Verification Number	
STORES	123	
SYSTEM	O Check / Money order	

You will receive the following confirmation:

You created the order.

If you configured the Payment Method to "Yes" for "Hosted Checkout" as your method of PCI scope reduction, then after you select "Credit Card" (or the "Title" you assigned to this extension Payment Method), the screen will appear as below.

MERCHANT =

Ŵ	Create New Order for	Derik Richards i	Cancel Submit Order
DASHBOARD		Payment & Shipping Information	
\$		Payment Method	Shipping Method
SALES		O Check / Money order	Get shipping methods and rates
PRODUCTS		Credit Card After you submit this order, you will be presented with an option to complete your payment.	
CUSTOMERS			
		Order Total	
CONTENT		Order History	Order Totals
		Order Comments	Subtotal \$32.00
ne on o			Shipping & Handling \$0.00
STORES			Grand Total \$32.00
SYSTEM			✓ Append Comments
			Email Order Confirmation
FIND PARTNERS & EXTENSIONS			Submit Order



Ŵ	#00000070						Q	# 0 1	expandlab 🔻
DASHBOARD		← Back	Cancel	Send Email	Hold	Invoice	Ship	Reorder	Edit
\$ SALES									
PRODUCTS	 You created the order 								
	ORDER VIEW	This	order has not	been paid for yet. To b	egin paying,	please click the	button below		
Marketing	Information		cgintrayinene						
	Invoices	Orde	er & Accou	nt Information					
	Credit Memos	Orde confi	r # 000000 rmation en	070 (The order nail was sent)		Account	Informati	ion Edit Cus	tomer
	Shipments	Order	r Date	Mar 5, 2018, 5:59	:05 PM	Name	r	[Derik Richards
STORES	Comments History	Orde	r Status	Pending Pa	ayment	Email		drichards	@merchante- solutions.com
SYSTEM	Transactions	Purch	nased From	Main V Main Websit Default Sto	Vebsite e Store re View	Custome Group	r		General
FIND PARTNERS & EXTENSIONS									

Click "Begin Payment", and the Hosted Checkout Page will open in a new window or tab. (Note that you can customize the appearance of this hosted page to match your website.

	Card Information
Tran Type	Sale
Tran Amount	\$62.00
Currency Code	USD
Account Number	
Expiration Date	01 - January V 2018 V
Security Code	
	Billing Information
Billing Address	3475 Lenox Rd NE Ste 500
Billing Zip Code	30326
	Submit
	Cancel

The following page will appear on the Sales Order screen after you click Begin Payment:

Ŵ	#00000070						Q	# 8 1	expandlab 👻
DASHBOARD		← Back	Cancel	Send Email	Hold	Invoice	Ship	Reorder	Edit
\$ SALES	. A Maria and a data and a								
PRODUCTS	 You created the order 								
CUSTOMERS	ORDER VIEW		Please complete a payment, you can	nd submit your payn close the popup. Thi	nent informat s page will au	tion on the new tomatically upd	window. After ate when you	you complete payment has	your been
	Information		Please allow up t	o 1 minute for your	order statu	s to update afte	er you submi	your payme	nt.
	Invoices		Current Order St Accidentally close	atus: Pending Payme the window? Click he	ent o ere to reopen	the window.			
d.	Credit Memos								

Enter the customer's card number, expiration date, and card security code in the Hosted Checkout window. The address information will have been pre-populated with their order information from Magento. Click "Submit." The adjacent payment confirmation page will appear:



You may now close the Hosted Checkout window. Allow for up to 1 minute for the Sales Order page to refresh with the following status message:

Û								<u> </u>	System Messag	es: 🛕 1
DASHBOARD	#00000033							Q	#8 1 :	expandlab 🔻
\$ SALES		← Ba	ck (Cancel	Send Email	Hold	Ship	Reorder	Invoice	Edit
PRODUCTS										_
	✓ You created the orde	r.								
	ORDER VIEW		Your p	ayment has b	een verified. You will	redirected sh	ortly			
	Information									

5. Third-Party Checkout Module Support

The MerchantE Payment Acceptance extension for Magento 2.x has been tested as compatible with the following checkout modules:

- Native Magento Checkout
- Native Magento One Step Checkout
- OneStepCheckout.com
- IWD
- MageStore

6. International Currency Acceptance

Note: International processing functionality must be activated on your MerchantE account before this can be implemented. Contact your MerchantE sales or support representatives for more information.

Checkout will always be in the "Base Currency" that you have set for the current Magento "Configuration Scope."

To view or change your "Base Currency," from the Admin Dashboard, select **Stores** \rightarrow **Configuration** \rightarrow **Currency Setup**. Select "Currency Options", then select your "Base Currency," "Default Display Currency" and "Allowed Currencies."



DASHBOARD	Configuration			Q 📫 上 mes 🗸
\$ SALES	Store View: Default Config 💌	0		Save Config
PRODUCTS				
	GENERAL ^	Currency Options		\odot
	General	Base Currency [website]	US Dollar 🔹	Use system value
	Web		transactions. The base currency scope is defined by the catalog price scope ("Catalog" > "Price" > "Catalog Price Scope").	
	Design	Default Display Currency [store view]	US Dollar 🔹	Use system value
	Currency Setup	Allowed Currencies [store view]	Afghan Afghani	Use system value
SYSTEM	Store Email Addresses		Albanian Lek Algerian Dinar	
	Contacts		Angolan Kwanza Argentine Peso	
& EXTENSIONS	Reports		Armenian Dram Aruban Florin	
	Content Management		Australian Dollar Azerbaijani Manat	
	New Relic Reporting		Azerbaijani Manat (1993-2006)	

To accept multiple types of currencies, you must set up a new view with a different base currency. For example, it is common to have a general storefront in Euros, then a specific view for customers in Germany, UK, etc. Each of those views can have an alternate "Base Currency."

7. Level II and Level III Processing

Level II or Level III processing is generally relevant when you are selling products to larger corporations or government entities. These B2B or B2G transactions are often authorized by cardholders using what are known as "Purchasing Cards" (or "P-Cards"). When accepting an eligible purchase card, providing this additional level of detail will ensure that you receive the lowest interchange rates for that transaction.

Level II transactions require the tax amount and an invoice or Purchase Order number from the buyer. When Level II/III is enabled within this extension, there is an additional prompt for the "Purchase Order Number" field during the checkout process. If the customer enters a value in that field, it will be sent to the card issuer. If no value is entered, then the Magento order number will be sent to the card issuer in that field. If tax information is configured within Magento, the tax information associated with a given transaction will be sent to the card issuer when Level II/III is enabled.

Level III transactions provide specific line-item details to the card issuer during the transaction, such as item description, quantity, unit-of-measure, price and tax information, and more.

To process Level III transactions, you must contact MerchantE to enroll in the Interchange Optimization Program. To activate Level III processing within Magento using this extension, and to ensure that you pass all required data, you must perform the following steps in Magento:

 Ensure that the "Use Level II/III Processing" option is set to "Yes" on the Payment Method/Order Settings configuration screen

M3RCHANT3

- Enter the "Default Commodity Code" which best describes the type of products that you sell on the Payment Method configuration screen. If you sell products which are classified under multiple commodity codes, ensure these are configured in Admin →Products → Catalog
- Select "Alternate Tax Rates" that may apply to specific tax codes on the Payment Method configuration screen (to create new custom tax rates, go to Admin → Stores → Tax Zones and Rules
- Your government-issued Tax ID number must be entered in the VAT Number field located at Admin → Stores → Configuration → General → Store Information. Note: The Validate VAT Number button will only work with VAT Numbers issued within the European Union and does not typically apply to US-based merchants.
- Ensure that your Products are set with the proper Tax Class (Admin \rightarrow Products \rightarrow
- **Catalog**, then select a product). Note that the only Unit of Measure that Magento natively offers is "each" (EA).
- In Magento 2 Enterprise Edition, the user may enter their "VAT Number" when creating a billing or shipping address. If this is done, these values will appear in the Tax ID field during checkout and will override any Tax ID associated with the customer profile
- The cardholder also may provide/edit their own Tax ID and/or Purchase Order Number when they submit their card information during checkout

oust Duffle Bag		← Back Add Attr	ibute Save
Product Reviews			6
Images And Videos			6
Search Engine Optimization			6
Related Products, Up-Sells, ar	nd Cross-Sells		0
Customizable Options			(
Product in Websites			(
Design			(
Autosettings			(
Gift Options			(
MeS Recurring Profile 🖌			(
Enable Recurring Profile [website]	Ves		
Frequency [website]	Please Select 🔺		
Downloadable Information	Please Select		
	MONTHLY		
	QUARTERLY		
	ANDUALLY		

8. Recurring and Subscription Payments

While it is not compliant and not recommended, it is possible to use the MerchantE Recurring Billing Service with Magento.

First, ensure that "Enable RBS" is set to "Yes" in the Payment Method configuration screen:

Additional Settings			
	Enable RBS [website]	Yes	•
		The MerchantE (ME) Recurring Billing Solution (RBS) is desit to assist clients who process installment or recurring billin desire a system to manage and automate processing transactions on a regular basis. Notice: The store is required to have "Enabled Hosted Checkout" set to "No" in order to use RBS.	igned g, and

Then, from the Admin Dashboard, select **Products** \rightarrow **Catalog**, and either edit an existing product or create a new one. Scroll down to the "ME Recurring Profile" tab and set "Enable Recurring Profile" to "Yes;" then define the frequency of the recurring/subscription payments which you would like to apply to this product. Repeat as needed for your other subscription-based products or services. You must contact MerchantE Customer Care to enable RBS on your account if you haven't already.

9. Account Updater Service

Account Updater Service (AUS) helps you avoid declines when you have payment cards or tokens on file, such as with subscription-based products or any recurring payments. MerchantE provides an automated service, sending card account information to the card brands on an ongoing weekly basis. The card brands return any updates such as revised expiration dates or new account numbers for cards that were replaced due to expired, lost or stolen cards.

To enable Account Updater Service, set "Enable AUS" to "Yes" in the Payment Method configuration settings. This feature will not function until you have enabled Account Updater Service on your merchant account with MerchantE. Contact a MerchantE sales or support representative for details.

10. Integrated Reporting

$\widehat{\mathbf{m}}$	Reports	·	·	×
DASHBOARD				Business Intelligence
\$ SALES	Products in Cart	Orders	Order Total	Advanced Reporting
8	Search Terms	Tax	Order Count	BI Essentials ^[2]
CATALOG	Abandoned Carts	Invoiced	New	Yotpo Analytics 🖾
	Newsletter Problem Reports	Shipping		
		Refunds		Customer Engagement
	Reviews	Coupons	Views	Dashboard
CONTENT	By Customers	PayPal Settlement	Bestsellers	Importer Status
REPORTS	By Products	Braintree Settlement	Low Stock	Automation Enrollment
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From Admin Dashboard, select **Reports** \rightarrow **MerchantE Reports**

Select any of the available reports:

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Provide a date range for your query, then click the "Show Report" button.

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Note: MerchantE Reporting is limited in sandbox mode. When requesting a report, if you receive the error "Invalid credentials. Please verify your credentials in the MerchantE configuration." Please ensure that you have entered the correct User ID and User Password provided by MerchantE into the Payment Method configuration screen. When requesting a report, if you receive the error "Unable to view this report due to insufficient rights." Your merchant account may not have permissions to request that specific report. Please contact your sales or support representative for more information, or email Help@merchantE.com.

11. Get Started

This concludes the User Guide. You are now prepared to begin using the MerchantE Payment Acceptance extension. If you have any questions or concerns, do not hesitate to contact your sales or solution consulting representative, or email us at <u>Help@merchantE.com</u>.

