



Genesis User Guide

Version 01

emerchantpay.com

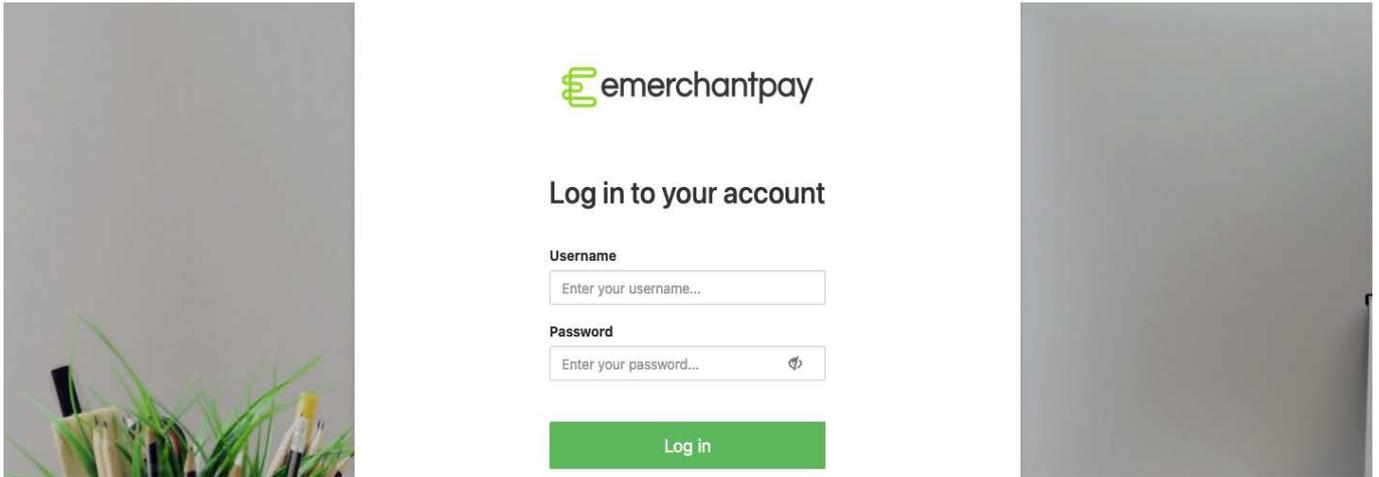
Genesis User Guide

1. Introduction

In this short guide, you will find basic information on how to navigate the merchant portal and perform simple operations, such as extracting reports, transaction monitoring and management.

1.1. Log in page

You will be given a unique customer URL, generated by our systems to enable you to access the Genesis user interface. This link will be provided via email and will direct you to a unique login page as seen below.



Note: upon account activation, you will be required to set up your password. To do so, please follow the onscreen steps. Remember, both username and password are case-sensitive.

1.2. How to reset your password

If you receive the following error message: 'Login failed', it means that you have entered the incorrect username or password.

If you are still unable to log in, please follow the below steps to reset your password.

1. Navigate to the login page and click on the link 'Can't log in?', located below the username and password fields. You will be redirected to another page, allowing you to reset your password.
2. You will receive an email, containing a one-time link for a password reset.
3. Follow the onscreen instructions to complete the password reset process.

Note: you can also reset your password directly from the gateway interface, via the "Preferences" button located at the top of the page.

1.3. Special cases

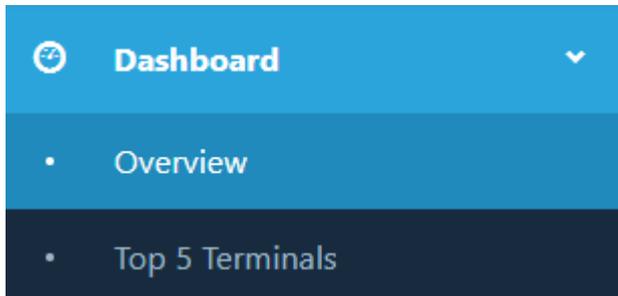
Please contact tech-support@merchantpay.com if you receive any of the below error messages:

Login failed. Account disabled, too many failed logins, please contact support. Account disabled, please contact support.

2. Merchant portal view

The Genesis user interface provides visual charts, enabling quick insights into real time data.

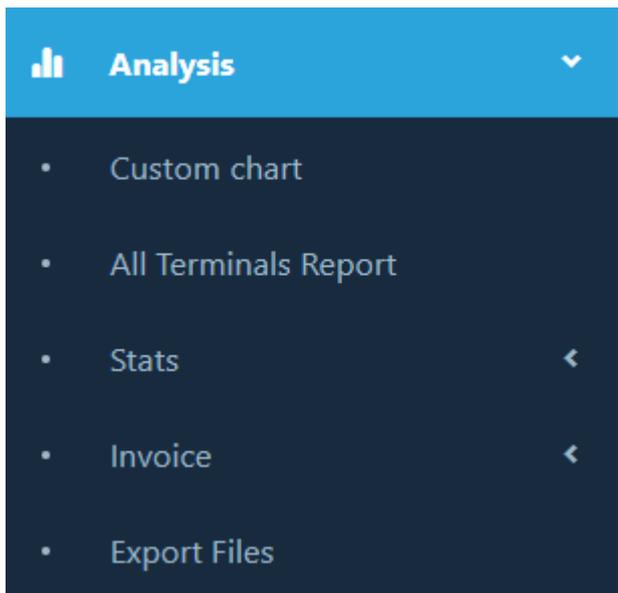
2.1. Dashboard



The 'Overview' allows you to see a chart of your daily processed volumes for the past 30 days in your default account currency.

In the section 'Top 5 Terminals' you can see the 5 terminals which have processed the highest volumes for the past 30 days (both eCommerce and / or physical terminals can be displayed).

2.2. Analysis

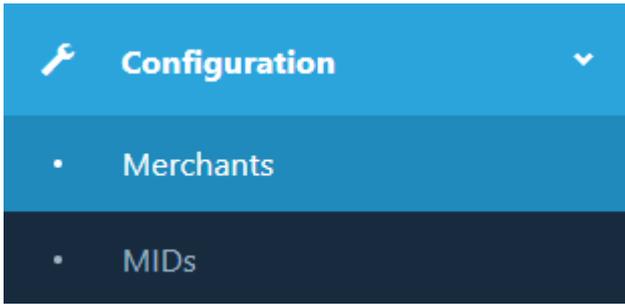


The 'Analysis' section provides the option to run the following types of reports:

- Custom Chart – you can chose the date range and terminals included in the chart.
- All Terminals Report – generates a report showing processing from all terminals combined, and you can view reports by predefined periods or choose a custom date range.
- Stats – showing per terminal and MID stats like 'total volume', 'total count', 'volume approved', 'volume declined', and much more.
- Invoice – here you can generate invoices by Terminal, by MID or by Merchant.

All Analysis reports can be exported in CSV and Excel file formats.

2.3. Configuration

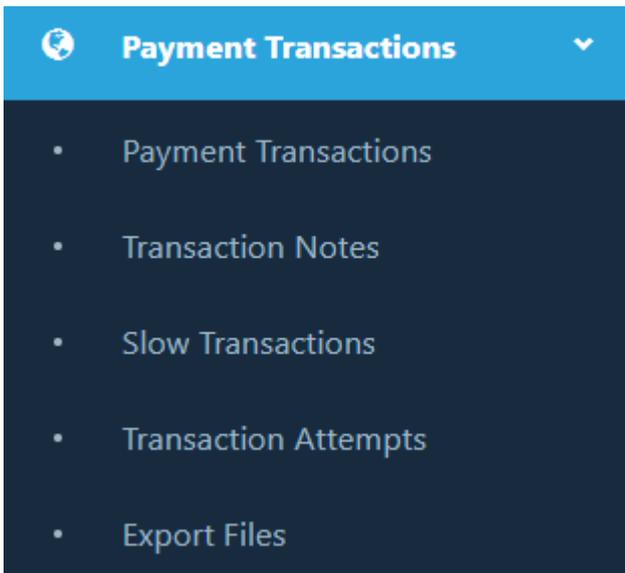


This section allows you to see your Merchant account and / or MIDs details, like supported features, terminals, etc.

In 'Configuration' – 'Merchants' you can customise your hosted payment page / WPF. You can upload:

- Logo – your company logo
- Terms & Policies – where applicable
- Terms & conditions
- Privacy policy
- Custom WPF CSS
- Custom footer text / disclaimer

2.4. Payment transactions



In 'Payment Transactions' section you can search for particular transaction or a group of transactions by using different search criteria, such as:

- Transaction ID
- Merchant
- Date range - by year, month, days, hours, minutes and seconds.

2.5. Card present



If you're processing Card Present transactions in this section you can see the acquirer you're boarded with (Elavon or ECP/E-comprocessing).

You can search for transactions that were processed and export the results into CSV and Excel files. Once you request an export from the search console, the file will appear in the 'Export files' section.

Note: for more information and details please refer to the full user guide, which can be downloaded from the 'Downloads' section in the user interface, bottom left of the page.

2.6. Hosted payment page / Web payment form (WPF)

This section opens a list of all processed transactions through your assigned hosted payment pages / WPFs.

Particular WPF transactions can be found through the search console within this section.

Q Search

Date range

By payment days

Merchant

Status

2.7. Consumers

In this section you can find a list of all consumers that have processed transactions on your Merchant account. By clicking on the action button of a consumer you can review their consumer details – ID, email, billing address, etc. Under the specific consumer profile you can see all Payment transactions performed by them.

You can search for consumers by date range, by merchant name and also filter by Consumer ID, email and Status.

2.8. Virtual terminal

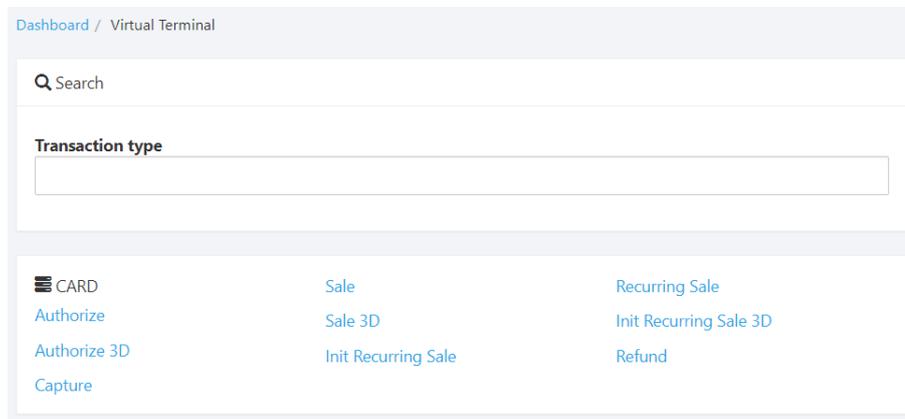
The virtual terminal is mainly used for processing MOTO transactions (Mail Order or Telephone Order).

Depending on your configuration, your merchant account may have different options for processing virtual terminal transactions and not all payments may be available to you. Check this with your dedicated account manager or risk analyst.

The main transactions supported by the virtual terminal are:

- Authorise, Authorise3d
- Capture
- Sale, Sale3d
- Initial recurring sale, recurring sale, initial recurring sale3d
- Account verification

For a full list of supported transactions and additional action details, please see Section 7 within the full gateway user manual (Version 3.5 – November 2018).



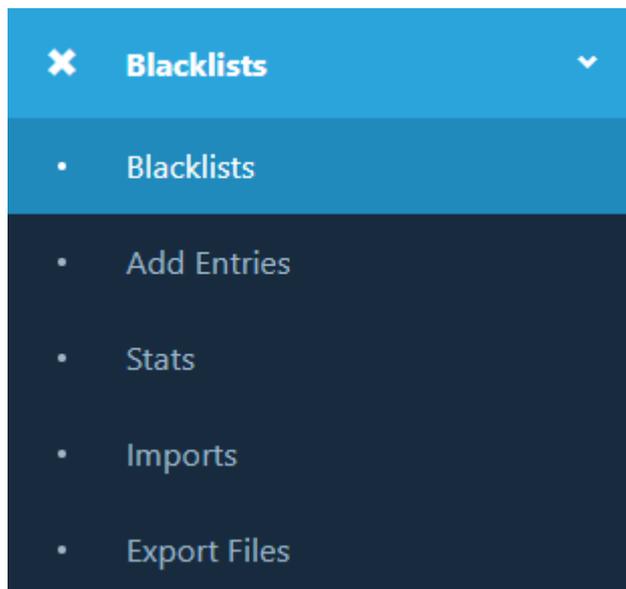
Dashboard / Virtual Terminal

Search

Transaction type

CARD	Sale	Recurring Sale
Authorize	Sale 3D	Init Recurring Sale 3D
Authorize 3D	Init Recurring Sale	Refund
Capture		

2.9. Blacklists



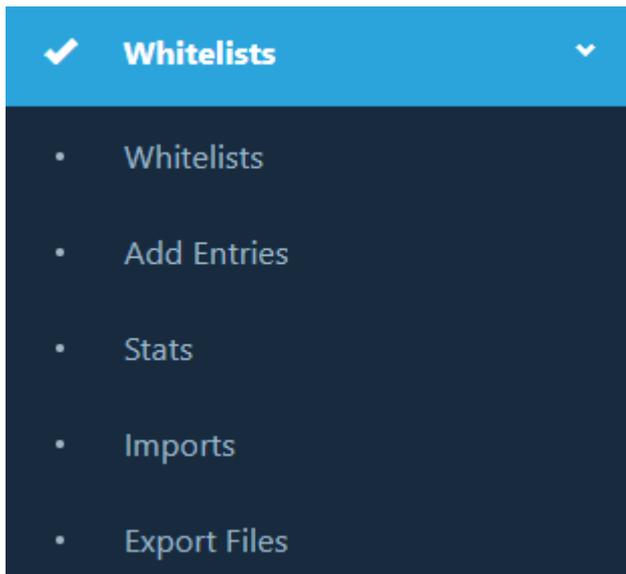
From the Blacklist page you can search for current entries in the database. When there is no 'Owner Class' and 'Name' this means that it is a global blacklist entry.

Entries in the Blacklist can be edited through the Action button.

You can also manually add new entries or import Blacklists. The required information for a new Blacklist entry is Name, Value, Blacklist.

Blacklists created by you can also be exported in CSV or Excel file formats.

2.10. Whitelists



You can whitelist a particular value for a merchant globally by making an 'Add entry'. By using the whitelist we can allow particular trusted cardholders to successfully pass through the Merchant Console and gateway while they are in the scope of a blacklist entry.

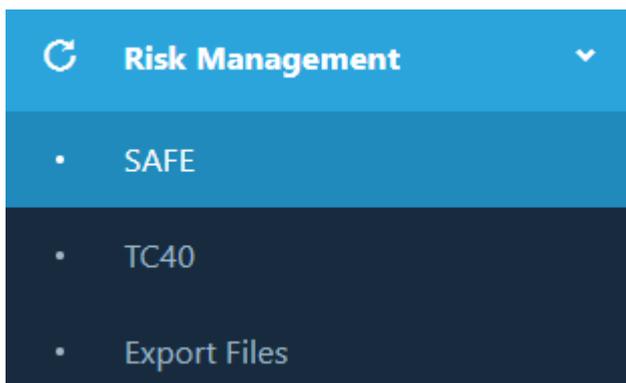
Another function of the "Whitelists" tool is to search in the whitelist database. From there, you can search for current entries in the database. When there is no 'Owner Class' and 'Name' this means that it is a global Whitelist entry.

You can also manually add new entries or import whitelists. The required information for a new whitelist entry is 'Name', 'Value', 'Whitelist owner'.

Whitelists created by you can also be exported in CSV or Excel file formats.

Note: for more information please refer to the full user guide, which can be downloaded from the 'Downloads' section in the user interface, on the bottom left of the page.

2.11. Risk management



In this section, there is a list of all transactions flagged as fraud – SAFE(for Mastercard) and TC40(for VISA). These are all fraud cases where the cardholder claims that a charge took place without his or her permission.

You can search and preview details for each SAFE and TC40 case. There is also an option to export reports for fraud cases. The reports can be found in the 'Export files' page under Risk Management.

2.12. Billing



The Billing section provides information regarding billing statements, billing transactions and paycommerce batches.

To view the billing transactions, export the statements or drill-down to separate transaction fees categories and discount types:

- View the billing transactions comprising a statement (through 'Actions' button)
- Export the statement in a PDF (through 'Actions' button)
- Drill-down to separate transaction fees categories and discount types (links in the statement details)

The user can:

- Go to the statement where the transaction is settled (Billing Statement column link)
- Go to the statement where the transaction fee is charged (corresponding column link)
- View the billing transactions comprising a statement (through 'Actions' button)
- Export the statement in a PDF (through 'Actions' button)
- Drill-down to separate transaction fees categories and discount types (link in the statement details)

For additional information, please check out the full Billing guide. You can get it from your account manager or relationship manager.

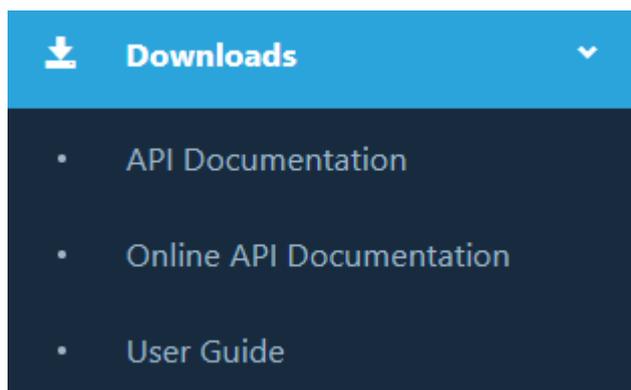
2.13. Users

The Users section shows all users who have access to the Merchant account. You can view all users' details and edit their accounts.

Genesis allows you to request different levels of access to the gateway depending on the particular role, i.e. Admin, Operations, IT support, Risk, Finance.

Role based access					
Role	Configuration	Analysis	Invoicing	Payment transactions	Virtual terminal
Merchant admin	✓	✓	✓	✓	✓
Merchant operations	✓	✓	✓	✓	✓
Merchant IT support	✗	✗	✗	✓	✓
Merchant risk admin	✓	✓	✓	✓	✓
Merchant finance	✗	✓	✓	✓	✓

2.14. Downloads



From the 'Downloads' section you can see the API Documentation, access the online API and download the full gateway user guide in PDF.

For more information or assistance please contact your account manager or relationship manager.



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