

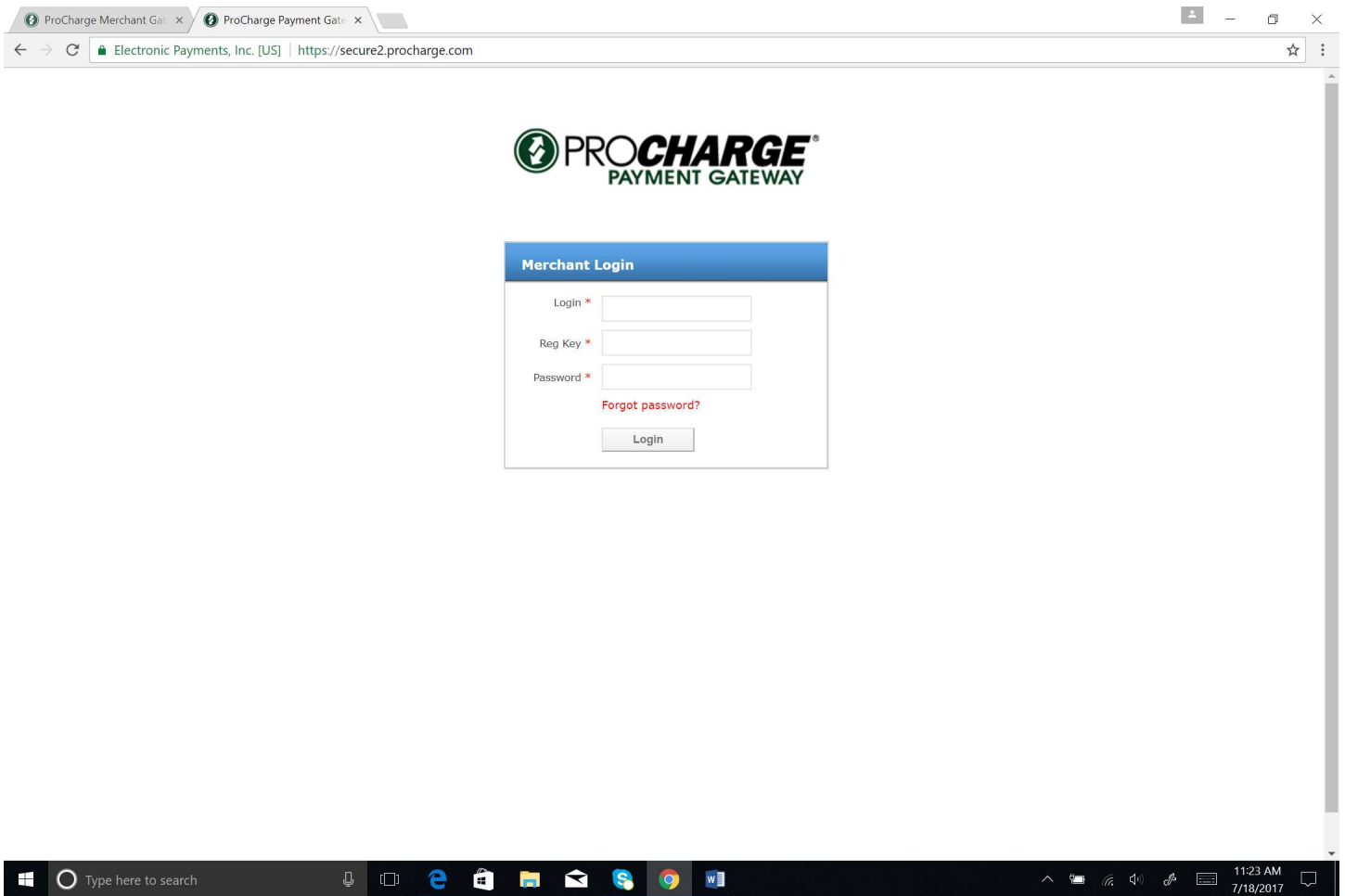
PROCHARGE PAYMENT GATEWAY

QUICK REFERENCE GUIDE

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SIGN INTO PROCHARGE GATEWAY



1. Go to login site:
<https://secure2.procharge.com>
2. Log in with your Login ID, Reg Key, and Password. **Remember, caps sensitive
(The Login ID is usually your email address. The REG KEY would have been emailed to you along with a temporary password to login and you will need to change it and use that new password from that point forward)

ProCharge Merchant Gateway | ProCharge Payment Gateway | Electronic Payments INC [US] | https://dev3.procharge.com/Merchant/MerchantHome.aspx?Menu=Home

Welcome, **ProCharge Test Demo**
 Last Login: 7/18/2017 10:57:29 AM
 Logged in as: Merchant
[Connect to QBO](#)

Home | Virtual Terminal | Customer | Invoice | Messages | Reports | Profiles | Custom Checkout | QBO Sync | Logout

Statistics

	Total Open Invoices	Total Closed Invoice
Current Month (Jul 2017)	\$100.00	\$0.00
Previous Month (Jun 2017)	\$0.00	\$0.00
Current Year (2017)	\$100.00	\$0.00
Previous Year (2016)	\$0.00	\$0.00
Since Beginning	\$100.00	\$0.00

Transaction Details
 No records are present.

Windows Taskbar: 11:27 AM 7/18/2017

3. Once you get logged in, you will see the main home screen with tabs across the top

END OF SECTION

INVOICING A NEW CUSTOMER

The screenshot displays the ProCharge Payment Gateway web application. The browser address bar shows the URL: <https://dev3.procharge.com/Merchant/ManageInvoice.aspx?Menu=Invoice&ReturnFromDetails=8NkDogbzg4Hay4ANpzhfgA%3d%3d>. The ProCharge logo is visible in the top left corner. In the top right corner, a welcome message reads: "Welcome, ProCharge Test Demo", "Last Login 7/18/2017 10:57:29 AM", and "Logged in as Merchant". A green button labeled "Connect to QBO" is located below the login information. A navigation menu at the top includes tabs for Home, Virtual Terminal, Customer, Invoice (which is currently selected), Messages, Reports, Profiles, Custom Checkout, QBO Sync, and Logout. Below the navigation menu, there is a search bar with the text "Name, Invoice Number" and a dropdown menu with three options: "Declined.", "No Card.", and "Added By Admin.". To the right of the search bar are three buttons: "Add", "Color code Search", and "Bulk Insert". A message box at the bottom of the search area states "No records are present!". The Windows taskbar at the bottom of the screen shows the time as 11:29 AM on 7/18/2017.

1. Click invoice tab
2. Click ADD button the right side of screen inside the Invoice Tab

The screenshot displays the ProCharge Payment Gateway interface. At the top, there are two browser tabs: "ProCharge Merchant Gateway" and "ProCharge Payment Gateway". The address bar shows the URL: "https://dev3.procharge.com/Merchant/invoiceDetails.aspx?Menu=Invoice&inv_id=V1aWG9DBVNPAoTyUXQxVQw%3d%3d&Action=S2oF5ZR2%2bhpRcZTycy%2fetA%3". The ProCharge logo is on the left, and a welcome message is on the right: "Welcome, ProCharge Test Demo. Last Login: 7/18/2017 10:57:29 AM. Logged in as Merchant. Connect to QBO".

The main navigation menu includes: Home, Virtual Terminal, Customer, Invoice (highlighted), Messages, Reports, Profiles, Custom Checkout, QBO Sync, and Logout. There are also buttons for "YouPay Payment URL" and "List".

The central form contains the following fields and options:

- Customer Name * (empty text box)
- Invoice Number * (text box containing "13595-757")
- Amount (\$) * (empty text box) with a checked "Tax" checkbox
- QBOTax Rates (text box containing "(NYState)")
- Tax (%) * (text box containing "8.625" with a note "(Tax set at ProCharge)")
- Total Amount * (empty text box)
- Due Date * (empty text box)
- Description (empty text box)
- Company Name (empty text box)
- Company Address (empty text box)
- Invoice Number (empty text box)
- Recurring Invoice Auto Billing

At the bottom right of the form area, there are three buttons: "Add Invoice", "Pay Invoice", and "Cancel".

The Windows taskbar at the bottom shows the search bar, task view, and several application icons (Edge, File Explorer, Mail, Skype, Chrome, Word). The system tray on the right shows the time as 12:45 PM on 7/18/2017.

3. Type customer name and when you go to next line it will ask you if you want to ADD this customer. Say YES.
4. At customer adding screen make sure you enter the email address so that the invoice knows where to send it.
5. When done, click Submit
6. Back at the invoice screen, finish filling in the RED asterisks and when done click on ADD INVOICE located at bottom right of page

Once the invoice is completed it will return you to the invoice tab. The email will be sent automatically as soon as you ADD the invoice for the customer.

INVOICING AN EXISTING CUSTOMER

The screenshot shows the ProCharge Merchant Gateway interface. The browser address bar displays "Electronic Payments INC [US] | https://dev3.procharge.com/Merchant/manageCustomer.aspx?Menu=Customer". The ProCharge logo is visible in the top left. A welcome message in the top right reads: "Welcome, ProCharge Test Demo. Last Login: 7/18/2017 10:57:29 AM. Logged in as Merchant. Connect to QBO".

The main navigation menu includes: Home, Virtual Terminal, **Customer**, Invoice, Messages, Reports, Profiles, Custom Checkout, QBO Sync, and Logout. Below the menu is a search bar with the text "Search Name, Login ID, Reg Key,Email" and a "Page Size" dropdown menu.

A table lists customers with the following columns: Name, Email, Last transaction: Date and Time, Amount, Status, Cards on File, and Create Invoice. The table contains five rows of customer data.

Name	Email	Last transaction: Date and Time	Amount	Status	Cards on File	Create Invoice
joe_smith	joes@electronicpaymentsinc.com				Add	Create Invoice
john_smith					Add	Create Invoice
test_test	none@none.com				Add	Create Invoice
jhkjk					Add	Create Invoice
johhn					Add	Create Invoice

- a. Click on the customer tab
- b. Find the customer in the list, and click CREATE INVOICE on the right of that customer



[YouPay Payment URL](#) | [List](#)

Customer Name *

Invoice Number *

Amount (\$) * Tax

QBOTax Rates

Tax (%) * (Tax set at ProCharge)

Total Amount *

Due Date *

Description

Company Name

Company Address

Invoice Number

Recurring Invoice Auto Billing

[Add Invoice](#) | [Pay Invoice](#) | [Cancel](#)

- c. Enter dollar amount to invoice
- d. Select a due date
- e. Click ADD invoice
- f. It will return you to the invoice tab

ADDING A CUSTOMER

ProCharge Merchant Gateway | ProCharge Payment Gateway

Electronic Payments INC [US] | https://dev3.procharge.com/Merchant/manageCustomer.aspx?Menu=Customer

Welcome, ProCharge Test Demo
Last Login 7/18/2017 10:57:29 AM
Logged in as Merchant
[Connect to QBO](#)

Home Virtual Terminal **Customer** Invoice Messages Reports Profiles Custom Checkout QBO Sync Logout

Search Name, Login ID, Reg Key, Email Active Inactive Page Size

Name	Email	Last transaction: Date and Time	Amount	Status	Cards on File	Create Invoice
joe_smith	joes@electronicpaymentsinc.com				Add	<input type="button" value="Create Invoice"/>
john_smith					Add	<input type="button" value="Create Invoice"/>
test_test	none@none.com				Add	<input type="button" value="Create Invoice"/>
jhkjk					Add	<input type="button" value="Create Invoice"/>
johln					Add	<input type="button" value="Create Invoice"/>

Type here to search | 12:53 PM 7/18/2017

1. Click on the customer tab
2. Click ADD on the right side of screen
3. Fill out form
NOTE: Do not forget the Email address as it is needed to send an invoice
4. When done, click SUBMIT at the bottom of page

MANUALLY ENTERING A SALE/QUICK SALE

The screenshot shows the ProCharge Payment Gateway interface. At the top, there are two browser tabs: "ProCharge Merchant Gal" and "ProCharge Payment Gat". The address bar shows "Electronic Payments INC [US] | https://dev3.procharge.com/Merchant/Sale.aspx?Menu=VirtualTerminal". The ProCharge logo is on the left, and a welcome message is on the right: "Welcome, ProCharge Test Demo Last Login 7/18/2017 10:57:29 AM Logged in as Merchant Connect to QBO". A navigation bar contains tabs: Home, Virtual Terminal (selected), Customer, Invoice, Messages, Reports, Profiles, Custom Checkout, QBO Sync, and Logout. Below the navigation bar, there are radio buttons for "Sale" (selected) and "Refund", and a "Pay Now" button. The main content area is split into two panels: "Customer Details" and "Pay Details".

Customer Details:

- Customer Name: Existing Customer
- First Name: Save Customer
- Last Name: Save Card
- Email:
- Mobile: (e.g. (xxx)xxx-xxxx)
- Description:
- Company Name:
- Company Address:
- Invoice Number:

Pay Details:

- Amount (\$): Tax
- QBOTax Rates: (NYState)
- Tax (%): 8.625 (Tax set at ProCharge)
- Total Amount*:
- Entry Method:
- Pay Type*:
- Card Present*: Yes No
- Card No. *:
- Name On Card*:
- Expiration Date*:
- Address:
- Zip:
- CVV:

At the bottom of the screenshot is the Windows taskbar with the search bar and various application icons. The system tray shows the time as 12:32 PM on 7/18/2017.

1. Click on Virtual Terminal tab
2. You will see 2 windows. One is Customer Details and the other is Pay Details.
The customer details window IS NOT required. It is optional IF you want to include the customer information in that quick sale. It's really for your records.
If you want to use the Customer Details window, you can select Existing Customer and select a customer by starting to type out the name or fill it out completely and select Save Customer and it will save when you finish filling out both windows and card is charged.

For a quick sale/faster transaction:

You can just fill out the Pay Details window with sale and card information
When done Click Pay Now at the top right of screen. Card will be charged.