



PAYMENTLOCK 101

Thank you for purchasing paymentLOCK Enterprise Edition. The industries first secure Card-Not-Present solution that completely removes all sensitive card holder data from your environment all while managing your customers payments in real-time.

Key Information To Know About Your New Product:

Clover Payeezy Gateway: Once you have an established merchant account for processing payments your PaymentLOCK account will be created. Upon setup of paymentLOCK on the Payeezy payment gateway it is always good to login and familiarize yourself with this portal so you can easily access daily or weekly batches and set automatic timing of your batches. You will also be able to validate any transactional data with First Data. Security settings such as Address Verification and others are listed within this portal as well. Some settings are not set as default so it is a best practice to look at these settings and decide what is best for your business. Please keep in mind that Payeezy may take up to 48 hours to post your initial transactions within paymentLOCK as part of their new customer setup and account validation

Current URL: <https://globalgatewaye4.firstdata.com>

Login Credentials: This information will be provided to you by the paymentLOCK support team as a permanent User Name and Password for the Super Administrator. New users can be set up with unique User Names and Passwords. If you have a specific request for the Super Admin User Name and Password please request that from your paymentLOCK account manager otherwise one will be assigned to you.

User Name & Password – Login Credentials (Example)

User Name: Realestate101

Password: \$Myrealestate!!

paymentLOCK Support: To access the support portal please use your Super Admin email and Password. Login for more information on how to start using your new paymentLOCK account. There is plenty of updated “How To” material for you to review. Within the portal, you can review frequently asked questions and questions from other clients as well as open your own ticket for a support request. From your support tab at the top right of your screen you can also email support@paymentlock.com any time for a quick response. We recommend adding a support ticket and then browsing through the support portal for answers to your questions.

payment**LOCK** GUIDE

Dashboard

- **Daily, Weekly, Monthly & Yearly Information:**
 - The information on your dashboard is designed to give you a quick snapshot of your total volume, Card types, and your most recent authorizations, charges and log information. If you would like a detailed snapshot of a specific card type just click on the card and the list of those transactions will be displayed below.

Charge Payment Platform

- **paymentLOCK Payment Processing Platform** – This Software platform is designed to give you the ability to interact with your customers in real-time and accomplish all of the core functionalities of doing business with any customer.
 - **Validate Customer Card** – Make sure a customer has a valid card that you can charge services to. All cards are validated.
 - **Authorize Customer Card** – Make sure your customer has the funds available to charge for future services.
 - **Quick Charge** – Send the known dollar amount to your customer for immediate charge upon CC Form submission.
 - **Charge Customer Card** – Charge card in real-time.
 - **Refund Customer Card** – Refund card in real-time.

Charge

NEW AUTHORIZATION OR CHARGE

- **New Authorization** – New Customer – Estimated amount to charge at a later date.
- **Quick Charge** – New Customer with known billing amount. Automatically charges upon customer submission.
- **Customer Information** – This tab is used to capture and store customer data. Upon submission from the customer the card data will be validated and stored on your dashboard for authorization / Charge at a future date.
- **Send Link** – After clicking on the appropriate method of transaction for your customer, select the send link tab for email or an SMS text. Both links will send your customer the Credit Card app via a secure link that your customer will be prompted to open. Once your customer submits the form this customer will show up as authorized or declined under your Charge dashboard. If this was sent as a Quick Charge the customer will be immediately charged upon selecting the “Submit” button on the CC form.

Charge

- **Charge Tab -**
The charge tab gives you a complete snapshot of all authorizations, charges or customer info requests that have been received as a result of your customer clicking on the secure link that you provided and submitting their information back to you.
- **Pending Charge Tab**
The pending charge tab shows you every transaction that has been sent out to your customers. This tab allows you to validate the sent request to your customer. You will also see a “LINK” tab on this page as well. You can right click this link and copy or open the link and copy the url and send this link to your customer via email or any other method. Companies will often use this feature to personalize the request via their own email.

Payment



View Details Link

- Here you will find the customers details including cardholder data such as name, email, phone number and address.
- **Refund Full or Partially Charged Amount** – If you need to refund existing charges to your customer you would do that here at the bottom of the page where you will see the history of charges.
- **Charge History** – Each transaction for that customer is documented at the bottom of this page for reference. This is also a snapshot of what will be generated for your Invoice.
- **View / Send Invoice** – If you click on Send Invoice from this page you will be able to view it, edit it, save it, and download it to PDF.



New Order Link

- If you have already charged for services and would like to create a simple way to charge for additional services without requesting all new CC information you would fill out the New Order form and send to the desired email. The customer will be prompted to ACCEPT to view the new order, sign and submit for additional payment.



Send Invoice Link –

- When you are ready to send an invoice to your customers, simply add the email address to the recipient and click send.

Reports

- **Reports Tab** – The reports tab allows you to take all transactions from a specific time period and sort them via any of the tabs located on the top toolbar. For example: If you wanted to sort the last 30 days for card type or dollar amount you would enter the requested dates and then click the top toolbar to sort. You can then export the report via XLS or CSV. This is a great tool used for accounting purposes.

Settings

- **General Settings Tab** – The general settings tab is used to help create a unique custom feel for every person or business you work with.
 - **Header Logo** – This logo will be presented on the top bar within your software and at the top of your Credit Card processing form that goes out with your secure link to your customers.
 - **Background Image** – This background image shows up behind your credit card form that goes out with your secure link to your customers.
 - **Policy Field** – The policy field is designed to give you the ability to add your own Terms and Conditions to the last page of the Credit Card form which has to be checked prior to your customer signing and submitting the form. This helps give your business flexibility and added security.
 - **Venue management** – “show venues during checkout” – You have the ability to remove this from the front page of your CC form that you are sending out to your customers. If you don’t wish for them to see this you can click on “Do not show venues during checkout”
- **Venue Tab** – The venue tab allows you to add multiple locations and additional venues within that location. This will appear on your Credit Card form as a drop down menu for your customers to choose. This can help you decipher where your customers are rendering services from and provide another level of detail when reporting.
 - **View / Notify** – By checking these boxes within the Venue setup you will be notified when your customer submits their CC data and when they have been charged or authorized.

- **User Tab** – Create, Edit and Delete Users in this tab. Prior to creating a new User you will want to create a specific role for a user which will allow specific permissions for that user. When creating a new user you will select the role from the drop down menu and proceed to add a new user name and password which will be used to login on the paymentLOCK main page. access1.paymentlock.com
- **Profile** – The profile tab is a snapshot of the current user logged in. You can edit and save changes to this profile.
- **Role** – The role tab is designed to allow the Administrator to create new roles within the software. Start by labeling your role. For example; SALES. Then click SALES from the drop down menu and click on the permissions below that you would like a SALES role to have. For example; the SALES role can send secure links but cannot charge or refund customers.
- **Logs** – The logs tab is an extremely important tool for understanding what is happening within the software in real time and for historical data.
 - **System Log** – The system log gives you a snapshot into every function that is being applied within your paymentLOCK software. This log provides visibility into the time stamp of a function, who initiated the function and what the result was.
 - **Transaction Log** – The transaction tab provides even more details about the transaction for review. This information can be used to thwart potential chargebacks through IP address and additional details.