



Payment Express® Payline® User Guide

1 OVERVIEW

Payline® is a web-based payment manager that can be used to process credit card transactions manually, process refunds, set up recurring payments, view transactions in real-time and generate reports to name a few of its functions. All transactions processed via any Payment Express API can be found on Payline®.

Payline® access is included with all Payment Express® E-Commence accounts.

It is most commonly used by organizations that require a cost effective, quick, simple process for accepting credit card payments.

Payline® can also be scaled for call centres or for organizations that require the ability to accept credit card payments in a card-not-present environment.

Payline® is popular with business that have traditionally telephoned or faxed credit card details to the bank for processing, and are now at the stage where real-time, processing and next-day settlement of funds is required.

Each individual Payline® user can be configured with privileges to meet their required needs.

Key Benefits

- Recurring Billing
- Set and forget payments
- Ability to view transactions in real-time
- Ability to process manual transactions (Purchase/Refund/Auth/Complete/Void).
- Downloadable reports that allows for quick, easy reconciliation
- Billing Vault - Secure storage of credit cards
- Process Mail Order / Telephone Orders
- Scalable – Perfect for call centres
- Secure – Payline® is hosted within Payment Express' level 1 PCI-DSS compliant environment.○
Multiple logins with different privileges

Please contact the Payment Express Team if you have any questions:

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2 LOGGING INTO PAYLINE®

You can logon to Payline® though our website at <https://www.paymentexpress.com> using the username and password provided with your account. Click “**Client Logon**”, at the top right hand corner of the website.

Direct Login URL: <https://sec.paymentexpress.com/pxmi3/logon>

paymentexpress

PAYMENT MANAGER

Welcome to Payline, your online payment management system.

Please logon to access your account.

Username:

Password:

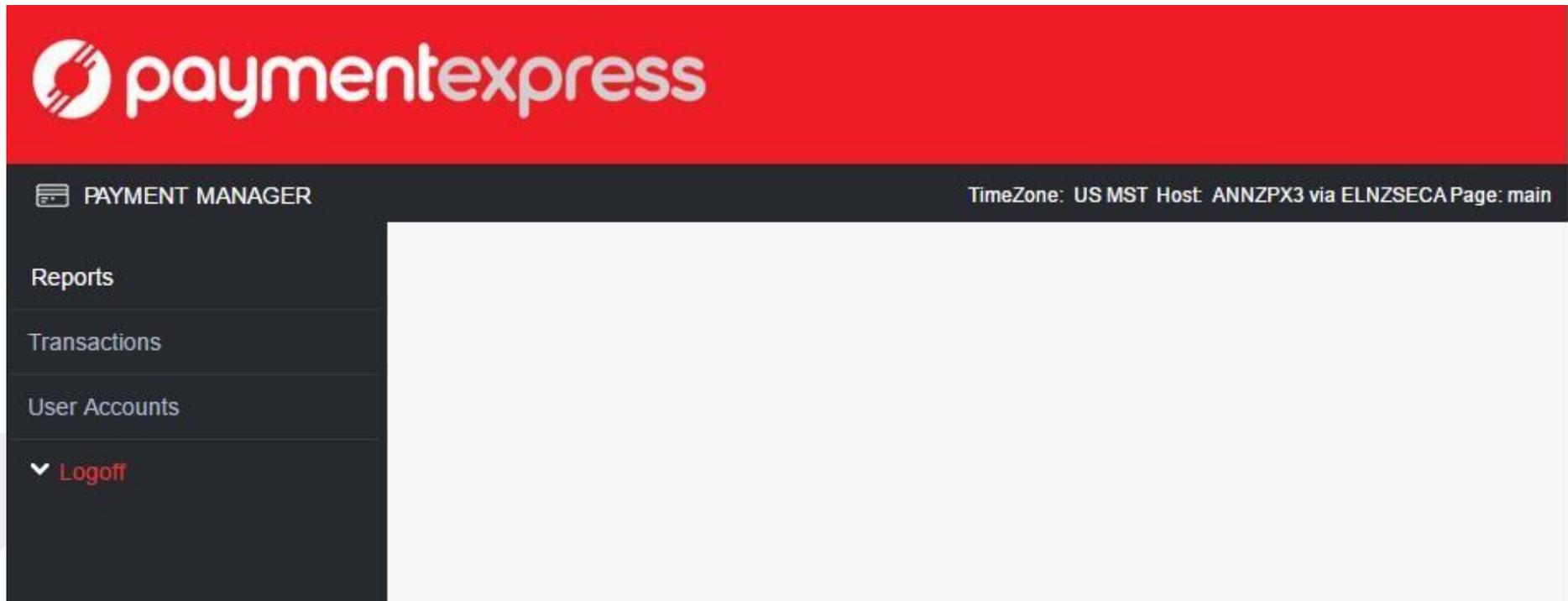
Logon **Forgot Password..**

Don't have an account? [Click here](#) to apply now.

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Once you log in successfully, you will be presented with the main screen. All available privileges assigned to the Payline® user will be displayed in the navigation menu on the left. More information about privileges can be found in Section 11.



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2.1 LOGIN ISSUES

If an incorrect username or password is entered, the message “**Incorrect Credentials, Please contact our help desk**” will be displayed.

You will also be presented with the option to reset your password via the Self-Service Password Reset service (Section 2.2.1). You can access this by clicking on the **Forgot Password** button.

Welcome to Payline, your online payment management system.

Please logon to access your account.

Incorrect credentials. Please try again or follow link below to reset your password.

Username:

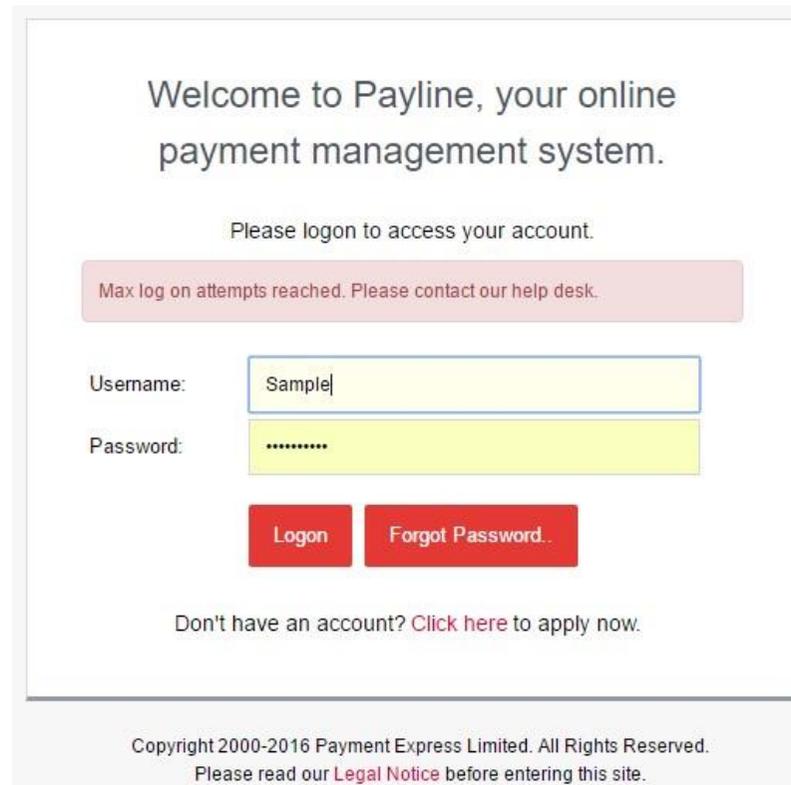
Password:

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If the username is correct but the password is incorrect, on the third failed attempt the message “**Max log on attempts reached. Please contact our help desk**” will be displayed.

The **Forgot Password** button is still available and can be used to access the Self-Service Password Reset service (Section 2.2.1).



Welcome to Payline, your online payment management system.

Please logon to access your account.

Max log on attempts reached. Please contact our help desk.

Username:

Password:

Don't have an account? [Click here](#) to apply now.

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2.2 RESET PAYLINE® ACCESS

2.2.1 Self-Service Password Reset via Registered Email

You can access this service by clicking on the link made available during a login failure message or visit directly using the URL <https://sec.paymentexpress.com/pxmi3/forgotpassword>

Please note that a valid email address must be provided during Payline® user setup for this to work.

Forgotten Password

You can reset your password yourself using this form. We will send you an email containing a link to allow you to reset your password.

Enter your user name along with the email address for the user:

Username:

Email Address:

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Once you have filled in your username and email, click submit and a confirmation page will be displayed to advise you that the email has been sent.

Check your email!

We have sent an email to the below address, please access your email to continue.

Email: paymentexpress@paymentexpress.com

The email will be sent from NoReply@paymentexpress.com and will contain a link to a secure session for the password reset. Simply enter your new password twice and click submit to complete the process. You will be logged into Payline® once complete.

Reset Forgotten Password

New Password:

Confirm:

↻ OK

2.2.2 Payment Express Support

If you still experience issues logging into Payline® please contact the Payment Express support team via email at support@paymentexpress.com or call directly (contact details in Section 12).

3 VIEW/SEARCH TRANSACTIONS

The transaction search feature allows you to search for all transaction types you have processed. All information is available in real-time.

To search for a transaction, click on 'Transactions' then 'Transaction Search' option from the navigation menu. Payment Express recommends using the 'Merchant Reference' field or 'DpsTxnRef' to search for a specific transaction. You can also choose to view transactions based on a particular date range and various other filters shown in the image below. The filters are defined further in the table below.

Tips:

- You can change the ordering of the transaction list to descending or ascending (by date) by selecting the DateTime toggle.
- You can reset your sort order by selecting the "Reset Sort Order" button on the right hand side of your screen.
- You can also choose how many transactions are listed on the single page by editing the value in the 'Max Rows' drop down menu.
- Copy and paste your 'DpsTxnRef' into the corresponding field and hit 'Enter' to navigate directly to your specific transaction.
- By selecting a specific transaction you will be able to "drill" down into the transaction specifics.

Search Parameter	Definition
Group Account	The specific account that a transaction was processed against
Card Holder	Name of the cardholder

Merchant Ref	Free text to appear on transaction reports. The merchant reference allows users to easily find and identify the transaction in Payline transaction query and PAYMENT EXPRESS reports. The merchant reference is returned in the transaction response, which can be used interpreted by the merchant website. Common uses for the merchant reference field are invoice and order numbers. This is an optional field.
Card Number:	The card number used for the transaction. The full credit card number isn't shown, however the bin range is given (first 6 characters) depending on masking pattern set.
Card Partial 6-4	The partial card number, first 6 and last 4 digits of the card number used to process the transaction
Card Partial 4	The partial card number, last 4 digits of the card number used to process the transaction
Card Number2	A token generated by Payment Express when adding a card for recurring billing. CardNumber2 is a 16 digit number which conforms to a Luhn 'mod 10' algorithm and has a 1-to-1 relationship with the actual card number used.
DeviceId	Merchant defined POS Device ID. Should be set according to Payment Express® Host configuration. No default value.
CA Device	Card acceptor device serial number.
CA Station	Card acceptor station name assigned to a specific card acceptor device serial number. Commonly is the same as the card acceptor device serial number.

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AuthCode	Authorisation code returned for approved transactions from the acquirer.
TxnRef	Contains a unique, merchant application generated value that uniquely identifies the transaction
User	The user defined in the request initiated against the Payment Express host to process a transaction/s.
DpsBillingId	When output, contains the Payment Express generated BillingId. Only returned for transactions that are requested by the application with the EnableAddBillCard value is set to true indicating a token billing entry should be created.
DpsTxnRef	Returned for every transaction. If the transaction was approved, DpsTxnRef can be used as input to a Refund transaction. Used to specify a transaction for refund without supplying the original card number and expiry date.

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TRANSACTION SEARCH OVERVIEW

DpsTxnRef:

Transaction Search

Group Acc:

Merchant Ref:

Card Partial 6-4:

Card Number2:

CA Device:

AuthCode:

User:

BillingId:

Card Holder:

Card Number:

Card Partial 4:

DeviceId:

CA Station:

TxnRef:

DpsBillingId:

Start Date (US MST): 01 MAR 2000 00 00 End Date (US MST): 05 MAR 2016 00 00

Transaction Results

Authorized	DateTime	Response	ReCo	Grp Acc	CardNumber	Brand	Cur	Brand	Amount	Card Holder	Merchant Ref	TxnRef	DeviceId	TxnType	DpsTxnRef	Void
✓	04/03/2016 22:49:02	APPROVED	00	Sample	411111....11	Visa	NZD	Visa	334.67	Sample	350	ID56da733d9db06		Prch	0000000319feeb88	✗
✓	04/03/2016 22:47:41	APPROVED	00	Sample	411111....11	Visa	NZD	Visa	12.30	Sample	349	ID56da72e2c70ab		Prch	0000000319fee80d	✗
✓	04/03/2016 22:38:40	APPROVED	00	Sample	411111....11	Visa	NZD	Visa	12.84	Sample	348	ID56da709cd92e4		Prch	0000000319fed12a	✗

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SEARCH FILTERS

Use Dps TxnRef to navigate directly to a specific transactions

DpsTxnRef:

Transaction Search

Group Acc:	<input type="text"/>	Card Holder:	<input type="text"/>
Merchant Ref:	<input type="text"/>	Card Number:	<input type="text"/>
Card Partial 6-4:	<input type="text"/>	Card Partial 4:	<input type="text"/>
Card Number2:	<input type="text"/>	DeviceId:	<input type="text"/>
CA Device:	<input type="text"/>	CA Station:	<input type="text"/>
AuthCode:	<input type="text"/>	TxnRef:	<input type="text"/>
User:	<input type="text"/>	DpsBillingId:	<input type="text"/>
BillingId:	<input type="text"/>		

Start Date (US MST): 01 ▼ MAR ▼ 2000 ▼ 00 ▼ 00 ▼ End Date (US MST): 05 ▼ MAR ▼ 2016 ▼ 00 ▼ 00 ▼

Reset transaction sort order and clear transaction filters

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TRANSACTION SEARCH RESULTS

Date Time Toggle to sort descending/ascending

Transaction Results

Authorized	DateTime	Response	ReCo	Grp Acc	CardNumber	Brand	Cur	Brand	Amount	Card Holder	Merchant Ref	TxnRef	DeviceId	TxnType	DpsTxnRef	Void
------------	----------	----------	------	---------	------------	-------	-----	-------	--------	-------------	--------------	--------	----------	---------	-----------	------

Go to row: Max rows: 20
0.000 seconds

Max Rows drop down menu

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TRANSACTION SPECIFIC SCREENS

Please note that no sensitive information is made available on any of these screens.

TxnInfo

TxnInfo	Credit Card Information	Account	Acquirer	Stats	3DSecure	Travel	Additional Options
Authorized:	1			AuthCode:	184902		
ReCo:	00			ResponseText:	APPROVED		
Currency:	NZD			Amount:	\$ 334.67 (NZD)		
Amount (Cash):	\$ 0.00 (NZD)			Amount (Tip):	\$ 0.00 (NZD)		
Amount Surcharge:	\$ 0.00 (NZD)			Transaction Date (US MST):	04/03/2016 22:49:02		
DateSettlement (US MST):	05/03/2016			TxnType:	Prch		
MerchantReference:	350			Username:	Sample		
GroupName:	Sample			GroupAccountName:	Sample		
Stan:	562872			Rm Enabled:	0		
Rm Reason:				Risk Score:			
Risk Score Text:				PAN Entry Mode:	Manual		
Cvc2 Result Code:	NotUsed						

← Back ↻ Refresh

Provides general information about the details related to the specific transaction. Depending on your solution some of the data available in this screen will not be applicable.

Key information can be found here such as Authorized result (1 or 0), Amount, Currency, Response Text, Transaction Date/Time, Partial Card Number, Group, Group Account etc.

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Credit Card Information

TxnInfo	Credit Card Information	Account	Acquirer	Stats	3DSecure	Travel	Additional Options
Card Name:	Visa	Card Holder:	Sample				
Card Number:	411111....11	Card Number 2:	8880200000003560				
Date Expiry:	01 / 18						

← Back ↻ Refresh

Provides the credit card details related to the specific transaction. If a Card Number 2 token is generated a reference to this token can be found here.

Account

TxnInfo	Credit Card Information	Account	Acquirer	Stats	3DSecure	Travel	Additional Options
CustomerName:	Test	ProductName:					
DeviceId:		VoidReCo:					
VoidDateTime (US MST):	01/01/1990	AdviceReCo:					
AdviceDateTime (US MST):	01/01/1990						

← Back ↻ Refresh

Identifies specific information related to your account, if the transaction was voided or if it was processed through a device.

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Acquirer

TxnInfo	Credit Card Information	Account	Acquirer	Stats	3DSecure	Travel	Additional Options
LiabilityIndicatorName:	Standard	AcquirerName:	Undefined				
Caid:	10000000	Catid:	10000000				
AcquirerDateTime (US MST):	05/03/2016	HostId:	9997				
SlotId:	5510	AcquirerReCo:	00				
AcquirerHostName:	DPS Host Simulator	AcquirerResponseText:	APPROVED				

← Back ↻ Refresh

Identifies detailed acquirer specific information related to a single transaction.

Stats

TxnInfo	Credit Card Information	Account	Acquirer	Stats	3DSecure	Travel	Additional Options
AccountInfo:			AppletType:	PxAccess			
TransactionId:	436136840		PxHostId:	3			
ClientTypeName:	Internet		ClientType:	I			
CountryCode:	NZ		AppletVersion:	4769			
BillingId:			Cli:				
ClientInfo:	49.50.202.21		DpsBillingId:				
Exponent:	2		LocationName:				
MerchantTxnId:			PhoneNumber:				
ProductCode:			ReCoPreProc:				
ServerName:	ANAMI3		TxnData1:	19 Mahunga Drive Auckland			
TxnData2:	New Zealand		TxnData3:	340			
TxnRef:	ID56da733d9db06		DpsTxnRef:	0000000319feeb88			
PerimeterElapsedMs:			BrowserInfo:	Mozilla/5.0 (Windows NT 6.3; WOW64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/48.0.2564.116 Safari/537.36			

← Back ↻ Refresh

Provides general statistical transactional message information related to the financial record

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3DSecure

TxnInfo	Credit Card Information	Account	Acquirer	Stats	3DSecure	Travel	Additional Options
Xid:	Cavv:						
PaReq:	PaRes:						

← Back ↻ Refresh

If the transaction was process via an Ecommerce Platform enabled for the 3DSecure redirect, information related to the 3D Secure Authentication can be found here.

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Travel

TxnInfo	Credit Card Information	Account	Acquirer	Stats	3DSecure	Travel	Additional Options
PaxCarrier:		PaxCarrier2:					
PaxCarrier3:		PaxCarrier4:					
PaxDateDepart (US MST):	01/01/1990	PaxDate2 (US MST):	01/01/1990				
PaxDate3 (US MST):	01/01/1990	PaxDate4 (US MST):	01/01/1990				
PaxTime1:		PaxTime2:					
PaxTime3:		PaxTime4:					
PaxLeg1:		PaxLeg2:					
PaxLeg3:		PaxLeg4:					
PaxClass1:		PaxClass2:					
PaxClass3:		PaxClass4:					
PaxStopOverCode1:		PaxStopOverCode2:					
PaxStopOverCode3:		PaxStopOverCode4:					
PaxFareBasis1:		PaxFareBasis2:					
PaxFareBasis3:		PaxFareBasis4:					
PaxFlightNumber1:		PaxFlightNumber2:					
PaxFlightNumber3:		PaxFlightNumber4:					
PaxName:		PaxOrigin:					
PaxTicketNumber:		PaxTravelAgentInfo:					
PaxInfoTxnId:							

← Back ↻ Refresh

If the transaction request includes PAX data then the specific information related to the transaction will be displayed here

Additional Options

TxnInfo	Credit Card Information	Account	Acquirer	Stats	3DSecure	Travel	Additional Options	Refund Transactions
---------	-------------------------	---------	----------	-------	----------	--------	--------------------	---------------------

Email:

Comment: Reason:

Allows for receipts to be emailed directly to a specifiable email address, provides the option of adding a card to the Blocked List, and allows for a Refund to be made for the selected transaction.

Refund Transactions

TxnInfo	Credit Card Information	Account	Acquirer	Stats	3DSecure	Travel	Additional Options	Refund Transactions
RxDate	Amount	MerchantReference						
20161007140242	\$ 0.20 (NZD)	My Reference						
20161007140236	\$ 0.20 (NZD)	My Reference						
20161007140219	\$ 0.20 (NZD)	My Reference						
20161007140213	\$ 0.20 (NZD)	My Reference						
20161007140205	\$ 0.20 (NZD)	My Reference						

0.015 seconds

← Back ↻ Refresh

The Refund transactions tab provides information on refunds relating to this particular transaction. If a refund has been made against the viewed transaction, the Date, Amount, and MerchantReference of the refund will be populated in the table.

E.g. Initial transaction made and then has 5 partial refunds made against it.

4 REPORTING

Using Payline®, merchants can process 'on demand' reports. Most reports are available in both PDF/CSV formats and can be downloaded.

Merchants can also process reports specific to date ranges and transaction types.

The reports screen can be accessed by clicking the **Reports** option in the navigation menu.

- All available report types will be displayed at the top under **Matching Reports**.
- Any reports that are ready for viewing/download can be found under **Ready Reports**. Simply click the report to view/download.
- Any reports that are currently being processed will be shown under **Pending Reports**.

Tip: The page does not dynamically update so use the **Refresh** button to refresh the page (e.g. if you are waiting for a report in the pending report list, hit the refresh button after sometime and if complete it will move to the ready report list).

Search Reports

Report:

Matching Reports - Click to Generate

Name	Description
Full Transactions	Full Transactions
Full Transactions Extended	Full Transactions Extended
Full Txns By Settlement	Full Txns By Settlement
Standard	Standard Report
Standard (Settlement Date)	Transactions by Settlement Date

0.031 seconds

Ready Reports

Name	Type	Date	OutputFormat
No results found.			

0.016 seconds

Batch Reports

Name	Date
No results found.	

0.015 seconds

Pending Reports

Name	Type	Queue Date-Time	Status
No results found.			

0.047 seconds

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To generate a report simply click on the report type you wish to create and you will be presented with the available options for that particular report. Fill in the required fields and click 'Add' to start generating the report. You will be redirected back to the main report screen automatically.

Generate Report

Title:	<input type="text"/>	Username:	Sample
Name:	Standard (Settlement Date)	Email:	<input type="text"/>
Email Report	<input type="checkbox"/>	Authorized:	All
Format:	PDF	Start Date (US MST):	04 AUG 2016 00 00
Group Account:	<input type="text"/>	End Date (US MST):	05 AUG 2016 00 00
Auth	<input checked="" type="checkbox"/>	Purch	<input checked="" type="checkbox"/>
Refund	<input checked="" type="checkbox"/>	Complete	<input checked="" type="checkbox"/>
F (AdviceEOV)	<input checked="" type="checkbox"/>	X (void)	<input checked="" type="checkbox"/>

+ Add

× Cancel

↻ Reset

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Dependent on the report type that you run there can be a number of different configurable parameters to define the specific data that you want to extract. The table below is and defines the general parameters you will see when you come to run a report.

Parameter	Definition
Title	Free text field to enter a meaningful report name or reference.
Name	Name of the report selected i.e. Standard, Standard (Settlement Date)
Username	Payline® username currently logged in.
Email Report	Tick if you wish to have the report emailed (otherwise you can simply download)
Email	Email address to email report to.
Start Date	The start date from which you would like to report on. Enter dates in DD/MM/YYYY format. You can also enter specific times you want to report on in the corresponding fields. By default, this is set to 00:00 (HH:MM).
End	The end date for which the report will be generated for. Enter dates in DD/MM/YYYY format. You can also enter specific times you want to report on in the corresponding fields. By default, this is set to 00:00 (HH:MM).
Group	The Group.
Account	The Group Account (leave blank if you wish to generate report for all Group Accounts under the Group).

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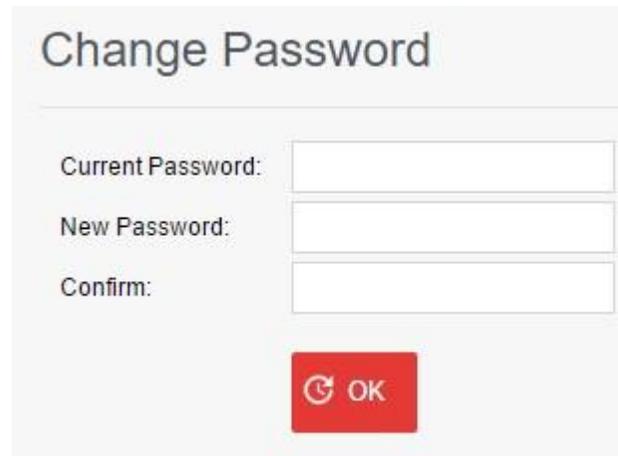
Purch Auth Complete Refund	Transaction types that you wish to have defined in your report
-------------------------------------	--

5 PASSWORD MANAGEMENT

PAYMENT EXPRESS recommend that you change your password periodically and that you do not store this in an easily accessible location.

To reset your password, click on '**Change Password**' on the navigation menu.

You will be prompted to enter your current (old) password and new password twice. Be aware that passwords are case sensitive and that your password must contain **at least 8 characters, with at least 1 being a numeral**.

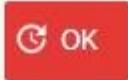


Change Password

Current Password:

New Password:

Confirm:



You will be prompted with the following message once the password reset has been completed.

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Change Password Result

Password change was successful.

Note: For security reasons, PAYMENT EXPRESS will force a password reset every 60 days. A similar screen will be displayed upon login if the password has not been reset after the 60 day period.

6 PROCESSING TRANSACTIONS

PROCESSING A PURCHASE

Click on the 'Transactions' then 'Purchase' menu item. Enter details of the credit card you would like to process the transaction for and click 'Submit'. Once you have clicked the Submit button, it will return a response. This response includes an authorisation code, which is unique for every transaction.

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Purchase

Merchant Reference:

Amount*:

Card Number*:

Cardholder Name*:

Expiry Date*:

Card Security Code:

Email:

TxnData1:

TxnData2:

TxnData3:

Parameter	Definition
Merchant Reference	Free text field. Enter any meaningful reference. Commonly used for transaction tracking and reconciliation. This field is only seen by you (the merchant), not your customer (the card holder).
Amount	The amount you wish to bill the card for.
Card Number	The credit card number of the card holder.
Cardholder Name	The name on the credit card.
Expiry Date	The expiry date of the credit card in MM / YY (month / year) format.
Card Security Code	The non-embossed 'securitynumber' (3 digits for Visa / MasterCard, 4 digits for American Express). Please check with your bank if they support this feature.
Email	Email address of the customer
TxnData1/2/3	The TxnData fields are free text fields that can be used to store information against a transaction.

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PURCHASE RESPONSE

Purchase Result

Merchant Date:	2016/08/05 04:10:54 UTC	User Date:	2016/08/04 22:10:54 US MST
Response:	APPROVED	ReCo:	00
Amount:	1.00 (USD)	Help Text:	Transaction Approved
Authorization Code:	161054		

Select to return to purchase screen to perform another transaction

PROCESSING A REFUND

Using tools provided by Payment Express, the merchant can process refunds to credit card holders without needing their customer's credit card information. Simply by searching for the initially approved transaction, the merchant can process refunds as many times as required, up to but no more than the original purchase amount. To process a refund, click on the **'transactions'** then **'refund'** menu item. You can search for the transaction either by searching date ranges, the merchant reference or full credit card number. To refund a transaction, click on the corresponding **'transaction'** you wish to refund. By selecting the transaction you will now be presented with the screen to enter your refund parameters.

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DpsTxnRef:

Transaction Refund Search

Card Number:

Start Date (US MST): 04 ▾ AUG ▾ 2016 ▾ 00 ▾ 00 ▾ End Date (US MST): 05 ▾ AUG ▾ 2016 ▾ 00 ▾ 00 ▾

Merchant Reference:

 Search

 Reset Sort Order

Clear Filters

Transaction Refund List

Select to enter refund screen

Date ▾	Group	Amount	Currency	Authorized	Card Number	Card Holder Name	Merchant Reference	Transaction Type
04/08/2016 22:10	Sample	1.00	USD	✓	411111.....11	SAMPLE	Sample	Prch

0.047 seconds

Enter your refund password. By default this is set as your original Payline password.

Enter a merchant reference and the amount you wish to process the refund for and click 'Submit'. The transaction will be processed and you will receive a response. This response also includes an authorisation code, which is unique to every transaction. If you are processing a refund for a credit card that is expired (where the card holder has retained the same credit card number), enter in the new expiry date in the 'Expiry Date' field.

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Important Notes:

Refund Result

Merchant Date: 2016/08/05 04:13:35 UTC
User Date: 2016/08/04 22:13:35 US MST
Response: APPROVED
ReCo: 00
Help Text: Transaction Approved
Authorization Code: 161335

← Back

Most banks also set a 'daily refund limit' for each merchant. If you are processing a relatively large refund and experience difficulties with them returning 'declined', contact your bank to find out what your daily refund limit is.

You can refund a transaction more than once. You can submit multiple refunds up until the value of the original transaction. For example, if a transaction is processed for \$90 you can submit any number of refunds up until the \$90 mark – this could equate to 3 \$30 refunds.

If you are processing a refund, and feel that you have entered all the fields above correctly, but continue to get a 'declined' transaction response, it may be that you are currently not configured by your bank for 'refund' transaction types. Contact the merchant services department at your bank to enable this function. Alternatively, please contact support@paymentexpress.com for more information.

Refund Result

Merchant Date: 2016/08/05 04:14:55 UTC
User Date: 2016/08/04 22:14:55 US MST
Response: ALREADY REFUNDED
ReCo: J5
Help Text: The transaction has already been fully refunded. A transaction cannot be refunded for more than the original amount.

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7 AUTHORISING TRANSACTIONS

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This option/section is only applicable to merchants that adopt the preauthorisation / completion model. Users can authorise transactions by clicking on the 'Transactions' then the 'Auth' menu item. Enter in the required information and click 'Submit'. The transaction will be processed and you will be presented with a response.

Authorization

Merchant Reference:

Amount*: USD .00

Card Number*:

CardHolder Name*:

Expiry Date*: 08 16

Card Security Code:

TxnData1:

TxnData2:

TxnData3:

Recent Transactions For Current User

-	Response	ReCo	DateTime	CardNumber	Brand	Cur
✓	APPROVED	00	04/08/2016 22:10	411111....11	Visa	USD

Parameter	Definition
Merchant Reference	Free text field. Enter any meaningful reference. Commonly used for transaction tracking and reconciliation. This field is only seen by you (the merchant), not your customer (the card holder).
Amount	The amount you wish to bill the card for.
Card Number	The credit card number of the card holder.
Cardholder Name	The name on the credit card.
Expiry Date	The expiry date of the credit card in MM / YY (month / year) format.
Card Security Code	The non-embossed 'security number' (3 digits for Visa / MasterCard, 4 digits for American Express). Please check with your bank if they support this feature.
Email	Email address of the customer

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TxnData1/2/3

The TxnData fields are free text fields that can be used to store information against a transaction.

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8 COMPLETING TRANSACTIONS

Users can complete transactions, by clicking on the 'Transactions' then 'Complete' menu item. Merchants can search for a previously authorised transaction either by merchant reference, card number, card holder name or by date range. Select the transaction you would like to process.

Transaction Completion Search

Card Holder Name:

Card Number:

Merchant Reference:

Start Date (US MST): 04 ▾ AUG ▾ 2016 ▾ 00 ▾ 00 ▾ End Date (US MST): 05 ▾ AUG ▾ 2016 ▾ 00 ▾ 00 ▾

Transaction Completion List

Authorized?	Date ▾	Card Number	Curr	Amount	Type	DpsTxnRef
✓	04/08/2016 22:19	411111.....11		1.00	A	00000003226bbc1d

Go to row: Max rows: 20 ▾

0.046 seconds

Select to enter completion screen

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Enter a merchant reference, followed by the amount you would like to complete the transaction for, and click on 'Submit'. You will be presented with a response page once the transaction has been processed. This response includes a unique authorisation code.

Completion

Merchant Reference:*

Amount: \$. (USD)

Card Number: 411111....11

CardHolder Name: SAMPLE

Important: You can only complete a single transaction once for the value of or less than the original authorisation.

Last Result

Date (US MST):	05/08/2016 04:21:04	Response:	APPROVED
ReCo:	00	Amount:	1.00 (USD)
Help Text:	Transaction Approved	Authorization Code:	162104

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9 BATCHUPLOAD

The Batch Processor is an online automation client that allows merchants to process large volumes of credit cards quickly and easily simply by uploading a CSV (comma separated variable) file. For more information on configuring this CSV file, please refer to the Technical Resources pages on our website www.paymentexpress.com

Once you have set up this CSV file, click on 'Other' then 'Batch Upload' option from the menu item. Click on 'Choose File' to select the file you wish to upload and then on 'Upload Batch' to upload this file. Please note Payment Express provide a solution to automate this upload function, please contact Payment Express via email to discuss the Batch Processor on sales@paymentexpress.com

Once this file has been uploaded successfully, you will receive a confirmation message and a response batch file will appear under the 'Reports' tab.

Upload Payment Express Batch File

Batch File: No file chosen

Upload Payment Express Batch File

Batch File: sample.csv

Batch Reports

Name	Date
Sample	0.000 seconds

Select to download and view report

BATCH FILE SETTINGS

Under 'Batch Settings' you can modify the input/output file to suit your CSV file, request a Payment Express Billing ID, as well as setup the correct currency to charge in. A

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Billing ID is an identifier supplied to the merchant to identify a customer or billing entry and can be used instead of a card number and date expiry for substitute transactions.

To learn how to correctly set up your Batch File Settings please refer to the Technical Resources pages on our website www.paymentexpress.com

10 RECURRING BILLING

Payline allows merchants to automate recurring transactions quickly, simply and most importantly securely -eliminating the need to store sensitive credit card data. If this is not available on your account please contact sales@paymentexpress.com to enable this functionality.

ADDING CARDS

In order to establish automated billing on a card it needs to be added to the Payline Billing Vault. This is done by clicking on 'Billing' then 'Bill Cards' from the menu. To add a new card, click 'Add' you can find this near the bottom left.

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Bill Card Search

Billing Id:

Card Holder:

Merchant Reference:

 Search

Clear Filters

Bill Card Records

DpsBillingId	BillingId	Date/Time	CardHolder Name	Merchant Reference	Card #
0000010022474506		19/08/2013	CHOLDER	AABBCC	411111....11
0000010037950131	BillingId123xyz	25/02/2014	CHOLDER	merchantreference1	411111....11

0.313 seconds

First Prev > Next >| Last **+ Add**

Select to add a new billing card

Bill Card

Billing Id:

Card Number:*

Card Holder:*

Merchant Reference:

Enabled

Date Expiry (mmyy):*

Issue Number:

+ Add

X Cancel

↺ Reset

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Merchant Reference	Free text field. Enter any meaningful reference. Commonly used for transaction tracking and reconciliation
Billing ID	Billing ID that the first and subsequent transactions are referred to as
Card Number	The credit card number of the card holder
Cardholder Name	The embossed name on the credit card
Expiry Date	Expiry date of the credit card
Enabled	Check to make the billing card live
Issue Number	If card has an issue number it can be entered here

CHARGING A BILL CARDS

Once you have completed the steps outlined above to add the card, you can search for the card that you have just added by selecting the 'Billing Cards' option from the menu. You can search for transactions based on a variety of fields. Payment Express recommend you using the DpsBillingId. You can enter the DpsBillingId you wish to charge and press the "Enter" key on your keyboard to automatically locate your bill card.

You can also use merchant reference field and / or the billing ID of the transaction for this purpose. Once you have entered in this information, click 'Search'. Once you have found and /or selected the bill card you want to charge you can proceed to initiate a transaction by pressing the "Charge" button.

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Bill Card

DpsBillingId:	0000010002538572	Billing Id:	<input type="text" value="Sample"/>
Card Holder:*	<input type="text" value="Sample"/>	Merchant Reference:	<input type="text" value="Sample"/>
Enabled	<input checked="" type="checkbox"/>	Card #:	411111....11
Date Expiry (mmyy):*	<input type="text" value="12"/> <input type="text" value="15"/>	Issue Number:	<input type="text"/>

Charge

Refund

Charge Bill Card (one-off charge)

Make a Transaction

DpsBillingId:	0000010002538572	Merchant Reference:	<input type="text" value="Sample"/>
BillingId:	Sample	Amount:*	USD <input type="text" value="0"/> <input type="text" value="00"/>
Card #:	411111....11	Expiry Date:	12 / 15
Cardholder Name:	Sample		

+ Submit

+ Back to Card

You will be presented with a screen to specify the amount of the "one off charge". Once you have done this click "Submit" and a transaction will be initiated against the bill card and will be displayed in the "Transaction Search" menu.

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Important Note: From the “BillCard” screen you can “**Edit**” and “**Delete**” an existing BillCard. If you are editing and there is not an existing BillingId you will be asked to provide one before any details can be updated.

SETTING UP RECURRING BILLING

Using the same process as above to search for and find a bill card, once you have found the card you can also set up recurring payments. This means you can automatically configure the bill card to be charged for a specific amount, for a specified frequency and for a specified duration among other configuration parameters explained below. To add recurring transactions select “Add” from the BillCard screen.

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Bill Card

DpsBillingId:	0000010002538572	Billing Id:	<input type="text" value="Sample"/>
Card Holder:*	<input type="text" value="Sample"/>	Merchant Reference:	<input type="text" value="Sample"/>
Enabled	<input checked="" type="checkbox"/>	Card #:	411111....11
Date Expiry (mmyy):*	<input type="text" value="12"/> <input type="text" value="15"/>	Issue Number:	<input type="text"/>

Charge

Refund

Update

Delete

Cancel

Reset

Associated Recurring Transactions

Group Account	Amount	Start Amount	Currency	Cycle	Recurring Count	Txn Count	Start Date	Next Cycle	Time Zone
<i>No results found.</i>									

0.000 seconds

+ Add

Select to add recurring billing to a bill card in the billing vault.

Recurring Transaction

Group Account:	<input type="text"/>	Billing
Card Holder:	Sample	Card N
Enabled	<input checked="" type="checkbox"/>	Amoun
Start Amount:	<input type="text" value="0"/> . <input type="text" value="00"/>	Curren
Cycle:	<input type="text" value=""/>	Recurri
Start Date (US MST):	<input type="text" value="04"/> <input type="text" value="AUG"/> <input type="text" value="2016"/>	TimeZc
Next Run Time (US MST):	<input type="text" value="04"/> <input type="text" value="AUG"/> <input type="text" value="2016"/>	Referen

Enabled	This checkbox must be ticked to enable recurring payments.
Amount	The amount to be re-billed
Start Amount	The merchant can bill an initial amount to the card (e.g. deposit amount). This payment will only be applicable for the first payment. Subsequent transactions will be billed based on the amount field above.

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Recurring Transaction

Group Account:

Card Holder: Sample

Enabled

Start Amount: .

Cycle:

- Annually
- Daily
- Every 2 Weeks
- Monthly
- Monthly 2nd Last CalendarDay
- Monthly 3rd Last CalendarDay
- Monthly Last CalendarDay
- Six Monthly
- Three Monthly
- Two Monthly
- Weekly

Start Date (US MST):

Next Run Time (US MST):

Currency	The currency you would like to bill the customer in (only applicable to customers that currently have multi-currency options enabled)
Cycle	The frequency of the recurring payments.
Recurring Count	The number of instances the card holder will be billed.
Start Date	The date from which the initial recurring payment will commence.
TimeZone	The time zone that you want the billing card to be charged in
Next Run Time	The date you want the first charge to initiate.
Reference	Free text field. Enter any meaningful reference. Commonly used for transaction tracking and reconciliation

Bill Card

DpsBillingId:	0000010002538572	Billing Id:	<input type="text" value="Sample"/>
Card Holder:*	<input type="text" value="Sample"/>	Merchant Reference:	<input type="text" value="Sample"/>
Enabled	<input checked="" type="checkbox"/>	Card #:	411111....11
Date Expiry (mmyy):*	<input type="text" value="12"/> <input type="text" value="15"/>	Issue Number:	<input type="text"/>

Associated Recurring Transactions

Group Account	Amount	Start Amount	Currency	Cycle	Recurring Count	Txn Count	Start Date	Next Cycle	Time Zone
Sample	1.00	1.00	USD	Monthly	10	0	10/08/2016	10/08/2016	US MST

0.016 seconds

11 PRIVILEGES

11.1 STANDARD PRIVILEGES

11.1.1 Customer Account Privileges

CRM Customer Invoices

Search, view and download invoices.

CRM Customer Payments

Search, view and download payments.

11.1.2 User Privileges

Change Password

Change password for current Payline® user ID.

User Management

Gives the Payline® user ID the ability to change the password for other Payline® user IDs within its Group.

11.1.3 Transaction Privileges

Purchase

Process "Purchase" type transactions manually via Payline®.

Auth

Process "Auth" type transactions manually via Payline®.

Complete

Process "Complete" type transactions manually via Payline®. Completes can only be processed on approved Auth transactions.

Refund

Process "Refund" type transactions manually via Payline®. Refunds can only be processed on approved Purchase and Complete transactions.

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Transaction Search

Search for transactions and view transaction details in real-time.

11.1.4 Token Billing Privileges

Billing Cards

Search and view tokens currently stored.

Add Billing Card

Manually add tokens.

Delete Billing Card

Manually remove tokens.

Charge Billing Card

Manually charge a token. Transaction type is Purchase. [Setup](#)

Recurring Billing

Setup a recurring transaction to be charged automatically.

11.1.5 Batch Privileges

Batch Upload

Allows access to upload batch transaction files for processing.

11.1.6 Hosted Payments Page Privileges Custom

Hosted

Allows access to customise and preview styling of hosted payments page.

http://www.paymentexpress.com/Downloads/DPSECOM_PXPay_2_0_IntegrationGuide.pdf

12 CONTACTS

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