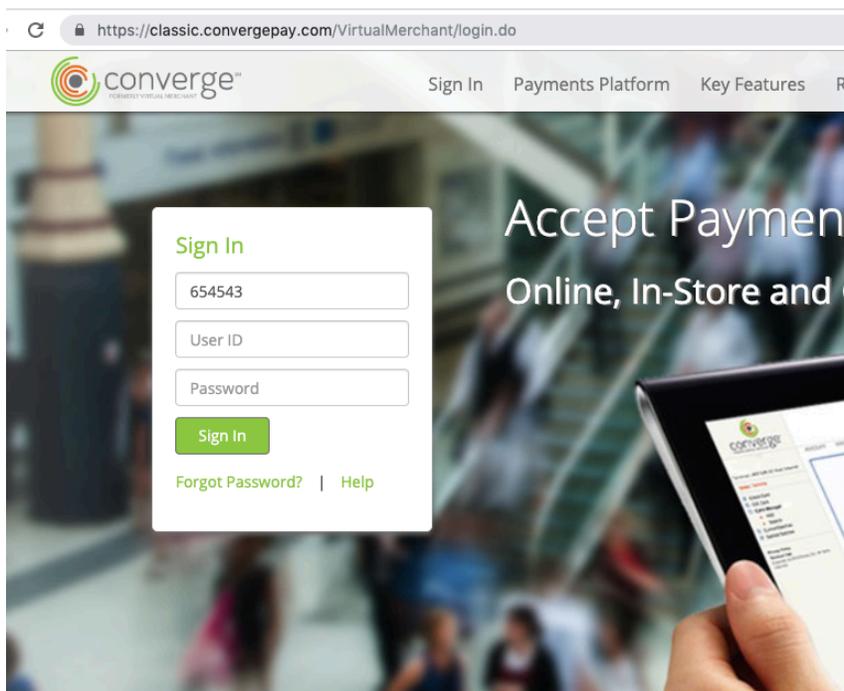


HOW TO REPORT CONVERGE PAYMENTS

created: 6/11/2019

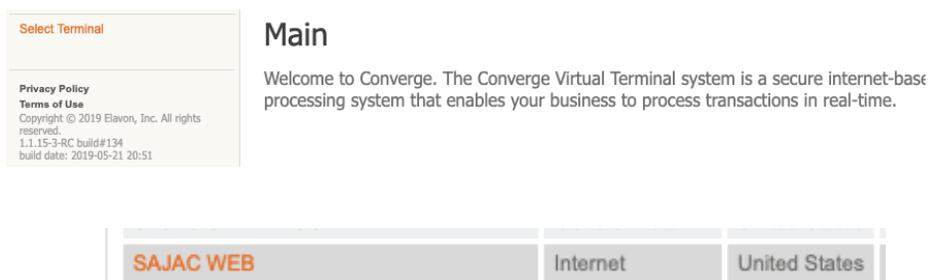
- 1) Login to CONVERGE <https://classic.convergepay.com/VirtualMerchant/login.do> with the username and password provided to you.



Enter the ACCOUNT ID
USER ID
PASSWORD

Used to access the
admin section.

- 2) On the left select **SELECT TERMINAL** → SAJAC WEB



TRANSACTIONS RAN AND IT IS STILL THE SAME DAY:

- IF the transaction was ran today and you wanted to see the transaction from today, click on the + plus sign to the left of **CURRENT BATCHES** --> then the + plus sign next to **MAIN** --> then click on the link called **CREDIT CARD**.

You will then see a list of the current batches for the day on the right. Once the day ends, the amounts here will BATCH and SETTLE (meaning the money will get processed to go into your bank account) - If you do not see any transactions here, it means that there weren't any charges for the day.

Select Terminal

- Credit Card
- Current Batches
 - Error
 - Fraud
 - Auth Only
 - Main
 - Credit Card
 - Imported Batches
- Settled Batches

Privacy Policy
Terms of Use
 Copyright © 2019 Elavon, Inc. All rights reserved.
 1.1.15-3-RC build#134
 build date: 2019-05-21 20:51

Current Batches: Credit Card

Select a transaction to review the authorization details.

Search | Filter: All

- no entries

User ID	Tran Status	Tran Type	Tran Date	Tran Time	First Name	Last Name	Card Data	Entry Type	AVS Code	CVV2 Code	Total Amount
No items in list!											

Transaction Count: 0 Net Amount: \$ 0.00

Display: 25

RUN A REPORT

- Click on the + plus sign next to **SETTLED BATCHES** - If you click on the link called **SETTLED BATCHES**, you will get a graph, so click on the + sign to the left of it then select the link called **MAIN**

Settled Activity

Select the batch to review

Download | Reports | Reports Plus | Search

- 18 Items

Batch#	Batch Response	Settled Date	Net Count	Net Amount	Number Purchases/Forces	Number Returns	Number Voids
018	GBOK 01806102108	2019-06-10 21:08:50	1	1.00	1	0	0
017	GBOK 01706092108	2019-06-09 21:08:07	1	15.00	1	0	0
016	GBOK 01606082108	2019-06-08 21:08:06	1	40.00	1	0	0
015	GBOK 01506072108	2019-06-07 21:08:51	1	76.00	1	0	0
014	GBOK 01405272107	2019-05-27 21:07:47	1	180.00	1	0	0
013	GBOK 01305212108	2019-05-21 21:08:38	2	45.00	2	0	0
012	GBOK 01205202108	2019-05-20 21:08:59	1	15.00	1	0	0
011	GBOK 01105032109	2019-05-03 21:09:33	1	76.00	1	0	0
010	GBOK 01004252109	2019-04-25 21:09:03	1	1.00	1	0	0
009	GBOK 00904242108	2019-04-24 21:08:57	1	50.00	1	0	0
008	GBOK 00804192109	2019-04-19 21:09:05	1	40.00	1	0	0
007	GBOK 00704162109	2019-04-16 21:09:05	1	30.00	1	0	0
006	GBOK 00604142108	2019-04-14 21:08:33	1	40.00	1	0	0
005	GBOK 00504112109	2019-04-11 21:09:09	2	80.00	2	0	0
004	GBOK 00404102109	2019-04-10 21:09:29	3	160.00	3	0	0
003	GBOK 00304072108	2019-04-07 21:08:41	1	100.00	1	0	0
002	GBOK 00204032109	2019-04-03 21:09:11	1	1.00	1	0	0
001	GB TEST DROPPED	2019-04-01 20:00:34	1	1.44	1	0	0

Batch Count: 17 Net Amount: \$950.00

Display: 25

You will now see all of the BATCHES and the SETTLED DATES.

If you click on the ORANGE Settled Date link, it will take you to that particular days charges. Meaning, if there were 2 charges on this day, then you would see both customer charges here.

- 5) If you just want to **RUN A REPORT**, you can click either **REPORTS** or **REPORTS PLUS** at the top right of the screen.

Batched Batch Activity							Download Reports Reports Plus Search
18 items							
Batch#	Batch Response	Settled Date	Net Count	Net Amount	Number	Number Returns	Number Voids

- 6) Click on **REPORTS** and you will get this screen: Enter your dates and **GENERATE REPORT**

Reporting

Select the date range, the Sort on criteria, report type and the View As option to generate the desired report. Please note that a report of only 3 months range or 50000 transactions is allowed at one time.

Reporting Options

Search Criteria

Date From(MM/DD/YYYY format)

Date To(MM/DD/YYYY format)

Sort On:

Report Type:

View As:

Main Batch for SAJAC WEB: Detail report sorted by User ID															
Profile Name	User ID	Batch Response	Batch Number	Transaction	Tran Type	Tran Date	Tran Time	Settle Date	Settle Time	First Name	Last Name	Account Data	Card Type	Card Desc	Appr Code
SAJAC WEB	Afterdark5	GBOK 01205202108	012	200519E3E-26543DAA-C823-4DE0-A15B-EF219A1860DE	Sale	05/20/2019	15:11	05/20/2019	21:08	Shirley	Efron	44*****0579	Credit Card	VISA	0568
SAJAC WEB	Afterdark5	GBOK 01305212108	013	210519A43-E8349DD8-A6C4-480B-9F28-3CBA87B765E7	Sale	05/21/2019	09:08	05/21/2019	21:08	Jennifer	Josephson	37*****5026	Credit Card	AMEX	2891
SAJAC WEB	Afterdark5	GBOK 01305212108	013	210519E3E-A8DD04FF-BA9F-477B-9B5A-5C87B2BDDDD6F	Sale	05/21/2019	14:27	05/21/2019	21:08	Tamara	Moch	54*****7845	Credit Card	MC	6721
SAJAC WEB	Afterdark5	GBOK 01405272107	014	270519E3E-A266E1D8-E044-498E-BA9A-643F4AAF5968	Sale	05/27/2019	15:08	05/27/2019	21:07	Susan	Abramson	48*****2071	Credit Card	VISA	0271
SAJAC WEB	Afterdark5	GBOK 01506072108	015	070619A44-B903CC78-CE1F-4F31-81ED-2585A8F0BE44	Sale	06/07/2019	12:07	06/07/2019	21:08	Gail	Greene	42*****0591	Credit Card	VISA	0141
SAJAC WEB	Afterdark5	GBOK 01606082108	016	070619A44-77FD7989-A7CD-4AB4-BBF7-07C05B1FAA41	Sale	06/07/2019	18:25	06/08/2019	21:08	Hayley	Saks	37*****7016	Credit Card	AMEX	265
SAJAC WEB	Afterdark5	GBOK 01706092108	017	090619E3C-0E96FBD3-7100-44E4-A061-1812DF03D364	Sale	06/09/2019	12:26	06/09/2019	21:08	Jean	Gaylis	37*****3001	Credit Card	AMEX	295
SAJAC WEB	Afterdark5	GBOK 01806102108	018	100619A44-C3697275-BDAB-4B03-A601-10986563A4E3	Sale	06/10/2019	12:45	06/10/2019	21:08	James	Byrne	44*****9834	Credit Card	VISA	010
Overall Totals		Count= 8		Amount= \$372.00											

- 7) Click on **REPORTS PLUS** gives you more detailed options to select for the report data. Select options then select **GENERATE REPORT**

Reporting Plus

Select the date range, the Sort on criteria, report type and the View As option to generate the desired report. You can select which System fields you like to see in your report by checking the fields in System Fields Selection section.

Import note: A report of only 1 month or 50000 transactions is allowed at one time.

Reporting Options

Search Criteria

Date From(MM/DD/YYYY format) 05/12/2019

Date To(MM/DD/YYYY format) 06/12/2019

Sort On:

Report Type:

View As:

System Fields Selection

<input checked="" type="checkbox"/>	AVS Response	<input checked="" type="checkbox"/>	Account Data/MICR Data	<input checked="" type="checkbox"/>	Amount	<input checked="" type="checkbox"/>	Approval Code	<input checked="" type="checkbox"/>	Auth Message
<input checked="" type="checkbox"/>	Batch Number	<input checked="" type="checkbox"/>	Batch Response	<input checked="" type="checkbox"/>	Batch SEQ Number	<input checked="" type="checkbox"/>	Card Description	<input checked="" type="checkbox"/>	Card Present
<input checked="" type="checkbox"/>	Card Type	<input checked="" type="checkbox"/>	Completion Date(MM/DD/YYYY)	<input checked="" type="checkbox"/>	Customer Code	<input type="checkbox"/>	Customer Full Name	<input checked="" type="checkbox"/>	Cvv2 Response
<input checked="" type="checkbox"/>	Departure Date(MM/DD/YYYY)	<input checked="" type="checkbox"/>	Description	<input checked="" type="checkbox"/>	Entry Type	<input checked="" type="checkbox"/>	Expiration Date(MMY)	<input checked="" type="checkbox"/>	First Name
<input checked="" type="checkbox"/>	Invoice Number	<input checked="" type="checkbox"/>	Last name	<input checked="" type="checkbox"/>	Original Amount	<input checked="" type="checkbox"/>	Original Date(MMDDYY)	<input checked="" type="checkbox"/>	Original Time(HHMMSS)
<input checked="" type="checkbox"/>	Original Transaction Type	<input checked="" type="checkbox"/>	Profile Name	<input checked="" type="checkbox"/>	Record Number	<input checked="" type="checkbox"/>	Sales Tax	<input checked="" type="checkbox"/>	Settle Date
<input checked="" type="checkbox"/>	Settle Time	<input checked="" type="checkbox"/>	Transaction Date	<input checked="" type="checkbox"/>	Transaction ID	<input checked="" type="checkbox"/>	Transaction Status	<input checked="" type="checkbox"/>	Transaction Time
<input checked="" type="checkbox"/>	Transaction Type	<input checked="" type="checkbox"/>	User ID	<input checked="" type="checkbox"/>	eCommerce Indicator				

- 8) When finished, it is a good idea to **LOGOUT**.