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Part One: Bluefin Support

OVERVIEW

Bluefin’s support department consists of seven full-time employees located in Chicago; a Director of Support, a Lead Support Rep, and five Customer Service Reps whose primary responsibility is to take calls out of a queue and respond to emails. The average years of industry experience is 4.5. We believe that our excellent customer service is one of Bluefin’s key differentiators. We strongly encourage anyone who has a negative experience with Bluefin’s support department to notify us via the escalation email below.

CONTACT INFO

PHONE: 800-675-6573 Option 2

EMAIL: service@bluefin.com

ESCALATION EMAIL: servicemanagers@bluefin.com

Escalation email goes to Director of Support, VP of Operations, and Lead Support Rep, so even if one person is out of the office, someone else will be able to respond.

RESPONSE TIMES

PHONE: Average hold time- under two minutes

VOICEMAIL: Call back within four hours during business hours

EMAIL: Response within 24 hours

HOURS

Monday – Friday: 8:00 am – 6:00 pm Central

Saturday: 8:00 am – 4:30 pm Central
LOGGING IN

You will receive a welcome email that contains your account ID, login name, and temporary password.

1) Navigate to https://secure.payconex.net/
2) Enter the information and then click “Login”
INTEGRATING WITH SOFTWARE

To integrate your PayConex account with your software, you will need two pieces of information- your account ID and API Access Key.

1) Click on “Settings” and then “Manage Settings”
2) Your Account ID will be in the top right corner
3) Your API Access Key is found at the bottom of the Basic Information section
4) Enter these numbers where indicated in your software or give them to your web developer to integrate into your website
PART FOUR: PROCESSING

PROCESSING A TRANSACTION

Please note: if you are processing through integrated software, transactions should be run within the software. These instructions are for processing transactions directly in PayConex.

SWIPE TRANSACTIONS

1) Click on the “swiped” tab
2) Enter the amount
3) Put cursor in “Swipe” field and swipe card in card reader, the card information will populate
4) For reporting purposes only, you can fill in the additional fields such as email address and phone number
5) Click “PROCESS TRANSACTION”
Part Four: Processing

KEYED TRANSACTIONS

To reissue an existing transaction for any amount, please see page 8.

1) Click on the “keyed” tab
2) Enter the amount
3) Key in card number and expiration (if you are using an encrypted swiper, you must type in the card number to the swiper itself)
4) For reporting purposes only, you can fill in the additional fields such as email address and phone number
5) Click “PROCESS TRANSACTION”
REFUNDING A TRANSACTION

To summarize – the process for refunding a transaction is as simple as navigating to the transaction and clicking “refund”. There are multiple ways to navigate to a transaction, here is just one way that it can be done.

1) Click on the “tools” tab and then “TRANSACTION SEARCH”
2) Enter search criteria and click “Search”
3) Once the transaction is pulled up, click the red “X” to the far right of it
4) On the next screen, click “REFUND TRANSACTION”
   For a partial refund; change the amount to what you want to refund

VOIDING A TRANSACTION

It is only possible to void a transaction when it has not yet batched out. PayConex will automatically void transactions that are refunded before the batch is settled. To void a transaction, just follow the instructions above for a refund and it will run as a void if it has not been batched out yet.
REISSUING A TRANSACTION

The process for reissuing a transaction, or running another transaction on a card that has been used before, is as simple as navigating to the transaction and clicking “reissue”. There are multiple ways to navigate to a transaction, here is just one way that it can be done.

1) Click on the “tools” tab and then “TRANSACTION SEARCH”
2) Enter search criteria and click “Search”
3) Once the transaction is pulled up, click the icon that contains a green arrow next to the transaction
4) At the next screen, edit the amount or any other fields that you need to and click “PROCESS TRANSACTION”
Part Four: Processing

RECURRING TRANSACTIONS

Many software companies that are integrated with PayConex do recurring billing by storing the recurring schedule within their software and reissuing it to PayConex as if it’s a new sale each time it’s scheduled. The instructions below are for initiating and processing recurring transactions directly within PayConex, which will not show up in a third party software system.

1 of 2: SETTING UP A RECURRING TRANSACTION ON A PREVIOUSLY USED CARD

1) Locate a previous record of the card being run (See page 8)
2) Click the magnifying glass next to the transaction
3) Click “CREATE RECURRING”
4) The card number will already be populated, just enter the amount and frequency etc.

2 of 2: SETTING UP A RECURRING TRANSACTION ON A NEW CARD

1) Go to the “tools” tab and then click “RECURRING”
2) Click “Add Customer”
3) Enter in the amount, start date, frequency, card data, and customer info and click “ADD CUSTOMER”
REPORT OF ALL TRANSACTION IN DATE RANGE

Below are instructions for exporting a report of all transactions within a date range. Please note this includes all attempted transactions, including declines and refunds. Depending on what you are trying to accomplish, you may want to filter out some of these transactions from Excel. A key for understanding the column headings can be found on the next page.

1) Click on the “tools” tab and then “TRANSACTION SEARCH”
2) Enter “Start Date:” and “End Date:” fields
3) Check “Download CSV”
4) Click Search
5) A box will pop up asking you to open or save the file, choose an option and click “OK”
### Glossary of Columns

<table>
<thead>
<tr>
<th>Column Name</th>
<th>English</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>TRANS_ID</td>
<td>Transaction ID</td>
<td>Unique ID assigned to the transaction</td>
</tr>
<tr>
<td>ACCOUNT_ID</td>
<td>PayConex Account ID</td>
<td>Your PayConex account number that you use to login</td>
</tr>
<tr>
<td>PAY_TYPE</td>
<td>Payment Type</td>
<td>C for Credit, K for ACH</td>
</tr>
<tr>
<td>TRANS_TYPE</td>
<td>Transaction Type</td>
<td>S for Sale, X for Refund, A for Authorization, R for Sale that has been refunded</td>
</tr>
<tr>
<td>TERM_TYPE</td>
<td>Terminal Type</td>
<td>S for Swiped, K for Keyed</td>
</tr>
<tr>
<td>AMOUNT</td>
<td>Amount</td>
<td>Amount of transaction</td>
</tr>
<tr>
<td>NAME</td>
<td>Name</td>
<td>Name entered</td>
</tr>
<tr>
<td>BRAND</td>
<td>Card Brand</td>
<td>Indicates whether transaction is Visa, MasterCard etc.</td>
</tr>
<tr>
<td>LAST4</td>
<td>Last Four Digits</td>
<td>Last four digits of card number</td>
</tr>
<tr>
<td>EXPIRATION</td>
<td>Expiration Date</td>
<td>Indicates when the card expires in the format of MMYY</td>
</tr>
<tr>
<td>DESCRIPTION</td>
<td>Description</td>
<td>If the “description” field is filled in at the time the transaction is run the information is displayed here</td>
</tr>
<tr>
<td>USER_DATA</td>
<td>User Data</td>
<td>Some integrated software vendors populate data into this field</td>
</tr>
<tr>
<td>AUTH_MSG</td>
<td>Authorization Message</td>
<td>Indicates whether transaction is approved or declined</td>
</tr>
<tr>
<td>AUTH_CODE</td>
<td>Authorization Code</td>
<td>Approval code sent from card issuer authorizing funds</td>
</tr>
<tr>
<td>AVS_CODE</td>
<td>Address Verification</td>
<td>Indicates “Y” if address information matches and “N” if it does not. Remains blank if address verification was not attempted.</td>
</tr>
<tr>
<td>CVV2_CODE</td>
<td>CVV Code</td>
<td>If CVV code from back of card matches, “M” is displayed. If a match was not attempted, field is blank.</td>
</tr>
<tr>
<td>IP</td>
<td>IP Address</td>
<td>Displays the IP address of the computer the transaction was run on if transaction was either run directly in PayConex or if software sent over the IP address.</td>
</tr>
<tr>
<td>CASHIER</td>
<td>Person who ran the transaction</td>
<td>If transaction was run directly in PayConex, the login used will be displayed. If it was run in a separate software program, it will display as “QSAPI”.</td>
</tr>
<tr>
<td>EMAIL</td>
<td>Email address</td>
<td>Will display the email address associated with the transaction. If field is blank and transaction was run in a separate software program, the software did not send us the email data.</td>
</tr>
<tr>
<td>GROUP_TAG</td>
<td>Group Tag</td>
<td>If processing on multiple accounts using one agent login, the group tag indicates which account the transaction was sent to.</td>
</tr>
<tr>
<td>REFUND_ID</td>
<td>Refund Transaction ID</td>
<td>If the sale was eventually refunded, the transaction ID of the refund is listed here</td>
</tr>
<tr>
<td>CUSTOM_ID</td>
<td>Custom ID</td>
<td>Displays a custom identification number either determined by software or recurring billing record</td>
</tr>
</tbody>
</table>
Part Five: Reporting

BATCH REPORT

A batch is a group of transactions that are sent to the processing bank to be funded.

1) Click on the “tools” tab and then “Card Batch Report”
2) The individual batch totals that have been sent to the processing bank are displayed
   a. Click the magnifying glass to see a list of all transactions
   b. Click “CARD” to see a breakdown by card type (see screenshot below)
   c. Click “D/L” to export a CSV file of all transactions
Part Five: Reporting

DAILY TOTALS

Below are instructions for pulling totals per calendar day which may or may not correspond to batch totals, depending on your batch time.

1) Click “tools” and then “Reports”
2) Click on “DAILY CARD TOTALS”
3) Totals per calendar day will be displayed
The transaction search feature allows completely customizable reports that can be exported. For more information on exported reports and how to read them, see glossary of columns page

1) Go to Tools, and then “TRANSACTION SEARCH”
2) Search by any parameters you choose and click “Search”; if you click “Download CSV” it will export a report
Part Six: Settings

SETTINGS MENU

The amount of customizable settings varies based on your access level. If you are missing functionality, please either contact the main user for your business to update your settings or contact Bluefin if you are the main user.

MANAGING USERS

Detailed instructions on following page

Enter username and email here to create a new user

Delete user

Change user contact info or access level
Part Six: Settings

CHANGE AN EXISTING USER’S PASSWORD

1) Click the third button to the right with the arrows next to their username
2) Enter their new password in both fields
   
   NOTE: This will NOT generate an email notification to the user

ADD A USER

1) In the first blank fields, enter a username and email address
2) Check the appropriate boxes depending on if you want them to have the ability to process transactions, refund transactions, or have admin privileges. Admin privileges will allow them to create additional users and update settings
   
   NOTE: If they have refund ability, they will only be able to refund existing sales
3) Click “ADD USER”
4) Create a password for them and click “ADD USER”
   
   A welcome email will be generated for them

EDIT THE EMAIL ADDRESS OR ACCESS LEVEL OF A USER

1) Click the first button under the “ACTION” heading next to their username
2) Edit the information that you need to and click “EDIT USER”

DELETE A USER

1) Click the red “X” under the “ACTION” heading next to their username
2) Confirm that you want to delete the user

BATCH TIMES

We optimize your batch time so that you get the fastest possible funding from the processing bank. In many cases, we are able to adjust batch time for merchants who find that the optimal batch time causes difficulty reconciling deposits. Delaying batch time causes deposits to be delayed a full business day. Please contact Bluefin if you would like to discuss adjusting your batch time.
RECEIPT EMAIL SETTINGS

1) Go to Settings and then “MANAGE SETTINGS”
2) Scroll down to the bottom and look under the “NOTIFICATION RULES” heading
3) Adjust when a receipt is emailed to you or to your customer and click “UPDATE SETTINGS”

If you’d like to have receipts emailed to customers, make sure that your software company is passing email data into PayConex. You can check this by looking at a transaction record and seeing if the email address is listed.

Default: Regular 8.5” x 11” paper
Narrow: Receipt printer/paper

RECEIPT EMAIL TEMPLATE

PayConex offers the option of customizing the receipt email that goes out to you and your customer

1) Go to the “tools” tab and click on “RECEIPT EMAIL”
2) Edit whatever you would like and click “Update”

These fields will populate whatever data is in that field, so if there is one that you routinely do not use, you may want to remove that field.
Part Seven: Receipts

PRINTING A RECEIPT

If you run a transaction directly in PayConex, you will have the option of printing the receipt directly after the transaction is run. These instructions are for printing a receipt for a past transaction.

1) Locate the transaction you are trying to print a receipt for (see transaction search instructions on page 14)
2) Click the “View Receipt” button
3) Click “Print”

Note: If you have a receipt printer or label printer with receipt paper, your receipt settings need to be adjusted to “narrow”. This can be done in the “settings” tab, see receipt settings section (page 17) for detailed instructions.
CREATING A PAYMENT PAGE

A Payment Page is a public page on the internet where your customers can submit payment to you. It is an ideal way to accept web payments for merchants who either accept donations, or only sell a few products. Below are instructions for setting up a payment page. If some of these options do not appear for you, please reach out to Bluefin’s Merchant Support department to make sure that you have payment pages enabled.

1) Go to the “tools” tab and click “PAYMENT PAGE”
2) Click “Create New”
3) Name the page and click “Add”
4) Fill in the fields and click “Update Form”
   
   *Detailed instructions in next few sections*
**Part Eight: Payment Pages**

**ADDING MULTIPLE PRODUCTS**

1) In the “Amount” field, select “Predefined Values” which will make additional fields appear
2) Enter the price and label for each product

![Screen Shot](image)

**ADDING CUSTOM FIELDS**

1) Towards the bottom of the form, under the “Custom Fields” section, click on “Click here to edit this section” which will make more fields appear
2) Enter the name of each field and whether or not it is visible or required

![Screen Shot](image)
CUSTOMIZING APPEARANCE

1) Click edit next to the form or while in edit mode of a new form, at the top under the “Appearance” heading click “Click here to edit this section”
2) You may choose a logo or alter any of the colors

Before... After!
CREATING A LINK OR BUTTON

Click the “BUTTON/LINK WIZARD” button next to your payment page.

TO CREATE A LINK

1) Check “Link”
2) In the “AMOUNT” field, leave blank unless you are accepting donations and want a link that already has a certain amount filled in
3) Click “GENERATE”

TO CREATE A BUTTON

1) Check “Button”
2) Label the button
3) A string of code will be produced, give to your web developer or enter onto your website to create a button