

BlackstonePAY Gateway



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## **Revision History**

Version	Date	Author	Description of Change
1.0	7/17/2013	Nitza McDermott	Document Created
1.1	8/20/2013	Nitza McDermott	Added new Invoicing functionality and revised all modified web pages
2.0	7/05/2018	Catalina Tellez	Added new dashboard view, new payment and customers report, new virtual terminal transactions, changes to the recurring billing, and new business settings.

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## LOGIN

For best results, it is recommended that you login to the **Blackstone Mobile Merchant** website using a modern web browser, such as Internet Explorer 9 or higher, Google Chrome, Mozilla Firefox or Safari.

1. Go to <u>www.blackstonemerchant.com</u> and click Login on the top right corner.



- 2. Enter your Username and Password, as provided in our welcome message.
- 3. Click Submit.
- 4. The **Dashboard** page is displayed. In the dashboard you can select what information you want to see, for example: This month, This week, Last week, Last Month, Last 3 Months. You can also select a specific cashier you want to see information on.

Home / Dashboard				
Dashboard				
This Month				•
	\$1,259.80 Total Amount	3 Total Transactions	3 Transactions Approved	0 Transactions Denied
WEEKLY SALES last 3 m	nonths	MONTHLY SALE	ES Last 3 months	
WEEKLY SALES last 3 m All Cashiers	nonths	MONTHLY SALE     All Cashiers	ES Last 3 months	•
All Cashiers	nordhs	MONTHLY SALE     All Cashiers     3000	ES Last 3 months	٠
WEEKLY SALES last 3 m All Cashiers	nonda	MONTHLY SALE     All Cashiers     Some     2500	E Les 3 montes	•
WEEKLY SALES lest 3 m All Cashiers	norda	MONTHLY SALE     All Cashiers     200	IS Les 3 months	•
WEEKLY SALES         last 3 m           All Cashiers         2500           2000         1500	nonta	MONTH'S SALE     All Cashers     Zono     Zono     Tono     T	15 Las I months	
WEEKLY SALES lest 3 m All Cashiers 2000 1000		MONTHI'S SALE     Al California     200     200     100     100	15 Las I months	
WEERLY SALES         Isst 3 m           All Cashiers         2500           2000         1000           1000         500		Al Cashers	B Les I month	
WEERLY SALES         Istal 3 m           All Cathlers         2500           2000         1000           1000         000           500         000		MONTH'S SALE     Al Calter	B Les I months	

# **CHANGE YOUR PASSWORD**

It is recommended that you change your password the first time you login to the Blackstone Mobile Merchant website. After that, you can change your password at your own discretion.

To change your password:

1. Click the User Settings tab.

BLACKSTONE	Dashboard	Reports	Make Payments	Invoicing	Cashiers	Gift Cards	Business Setti	ngs User Settings
me / Dashboard								
ashboard								
This Month								
	5	\$1,259.8 Total Ame	80 <sub>Dunt</sub>			Total Transact	3 ions	
							мо	NTHLY SALES Last 3 mor
NEEKLY SALES last	8 months							

2. The **User Settings** page is displayed.

User Settings	User Settings	
Change Password		
Other options	Primary Information	ation
	Name	
	Test Owner	
	Email	
	Testowner@email.com	
	Current Password	
	Type your password here	
	New Password	Confirm New Password
	Retype your password here	
	Save	

- 3. Enter the requested information, where:
  - a. Name is the name of your business.
  - b. Email is your business email address.
  - c. **Current Password** is your current password.
- 4. In the **New Password** field, enter the new password you wish to use.
- 5. Re-enter your new password in the **Confirm New Password** field.
- 6. Click **Save** to submit.



# MANAGE CASHIERS

The **Cashiers** option allows you to view, add, edit and delete cashiers.

a. Click the **Cashiers** tab.

Home / Dashboard Dashboard This Month \$0,00 Total Amount Total Amount	BLACISTONE	Dashboard	Reports	Make Payments	Invoicing	Cashiers	Gift Cards	Business	Settings	User Settings
Home / Dashboard Dashboard This Month \$0,00 Total Amount Total Amount										
Dashboard This Month  \$0.00 Total Amount Total Amount Total Transactions	Home / Dashboard									
This Month \$0,00 Total Amount Total Transactions	Dashboard									
\$0.00 Total Amount	This Month									
			\$0.C Total Amo	)O unt	1		• •	O ons		т
WEEKLY SALES last 3 months MONTHLY SALES last 3 months III Cruhitra	WEEKLY SALES last 3	months							MONTHL	Y SALES Last 3 months

b. All cashiers associated with your account are displayed.





### Add a Cashier

1. Click **Add Cashier** on the left panel of the **My Cashiers** page.



- 2. Enter the required information.
- 3. Assign a **Username** and **Password**. Checkmark the box if you want to allow this cashier to make refunds
- 4. *Optional*: Click **Browse** to upload an image of the cashier. The image must exist in your file system.

Browse your file system for the desired image and double click it.

5. When done, click Create Cashier.

**Note:** You will receive notification from Blackstone Merchant Services once your request is executed.

6 Click **Back to List** to return to the **My Cashiers** page.

My Cashiers	Add Cashier	
Add Cashier	Cashier	
	First Name	
	Type your first name here	
	Last Name	
	Type your last name here	
	Description	
	Add a bird decention of the cashier Thaw Mill allow you to easily recognize the cashier in the Phymerita section.	
	Username	
	Type your username here V The Username field is required.	
	Password	
	Type your password here The Password field is required.	
	Picture: Choose File No file chosen	
	Create Cashier	

BLACKSTONE Dashboard Reports Make Payments Invoicing Cashiers Gift Cards Business Settings User Settings



#### **Edit a Cashier**

 Click the Edit button associated with the cashier you wish to edit.



- 2. Enter the information you wish to edit.
- 3. *Optional*: Click **Browse** to upload an image of the cashier. The image must exist in your file system.
- 4. When done, click Save Changes.

Edit C	ashier
	First Name
	BLACKSTONE
	Last Name
	MERCHANT SERVICE
	Username
	bms2
	New Password
	Type your password here
	Retype Password
	Retype your password here
	AllowsRefund
	Description
	Cashier1
	Change Picture: Choose File No file chosen
	Save Changes

5. The message **Recently Updated** displays on the **My Cashiers** page indicating the cashier's profile was recently updated.





### **Delete a Cashier**

1. Click the **Delete** button associated with the cashier you wish to delete.

	AD	<b>G</b> 'Edit
X.	Username: test1	× Delete
	Added On: May 16, 2013	
All Pr	Alexandra Duran	<b>G</b> Edit
S.	Alexandra Duran Usemame: aduran	☑Edit

2. A confirmation message is displayed.





# REPORTS

The **Reports** option allows you to view summary and detailed transaction activity as well as a customer report for all those customers who have made payments.

### **Payments Report**

1. Click the **Reports** tab. Click **Payments** to view detailed transaction information.

BLACKSTONE	Dashboard	Reports	Make Payments	Invoicing	Cashiers	Gift Cards	Business Settings	User Settings
		Paymen	ts ers					
Home / Dashboard								
Dashboard								
This Month								
		\$1,259. Total Arr	80 Iount			Total Transacti	3 ons	

- 2. Select the time frame you wish to view.
- 3. You have the option to:
  - a. Click **ALL CASHIERS** to view transactions processed by all cashiers, or choose a specific cashier.
  - b. Search by amount, authorization #, last 4 digits of card, customer name, client ID, etc.

**Note**: You can print or export the report to Excel.

BLACIDIONE	(	Dashboard	Reports	Make Payments	Invoicing	Cashiers	Gift Cards	Business Settings	User Setti
avments									
Filters			Ŷ	J			Ŷ		
CASHIER		FROM		то		CREDIT CAP	D LAST FOUR D	IGITS	
All Cashiers	Ŧ	Jun 28, 2018		Jul 5, 2018	E C				
			-						
Search In: AUTHOR	IZED, AMOUN	I, AUTH#							
Credit Cards Info Gif	t Cards Info	Check Info							
Print Export to Excel									
		\$231.30	1 Denied Tra	nsactions 0 Refunde	d Transactions	0 Voided Tr	ansactions		
<ul> <li>Thu, Jul 05, 2018</li> </ul>	1 payments						anouctions		
<ul> <li>Thu, Jul 05, 2018</li> <li>Tue, Jul 03, 2018</li> </ul>	2 payments	\$1,028.50	0 Denied Tr	ansactions 0 Refund	led Transactions	0 Voided	ransactions		
<ul> <li>Thu, Jul 05, 2018</li> <li>Tue, Jul 03, 2018</li> <li>Fri, Jun 29, 2018</li> </ul>	2 payments 2 payments	\$1,028.50 \$80.23	0 Denied Tr 0 Denied Trans	ansactions 0 Refund	led Transactions Transactions	0 Voided 1 0 Voided Tran	ransactions		
<ul> <li>Thu, Jul 05, 2018</li> <li>Tue, Jul 03, 2018</li> <li>Fri, Jun 29, 2018</li> </ul>	2 payments 2 payments 2 payments	\$1,028.50 \$80.23	0 Denied Tr 0 Denied Trans	ansactions 0 Refund	led Transactions Transactions	0 Voided 1 0 Voided Tran	ransactions		
<ul> <li>Thu, Jul 05, 2018</li> <li>Tue, Jul 03, 2018</li> <li>Fri, Jun 29, 2018</li> </ul>	2 payments 2 payments 2 payments	\$1,028.50 \$80.23	0 Denied Tr 0 Denied Trans	ansactions 0 Refund actions 0 Refunded	led Transactions Transactions	0 Voided 1	ransactions		
<ul> <li>Thu, Jul 05, 2018</li> <li>Tue, Jul 03, 2018</li> <li>Fri, Jun 29, 2018</li> <li>Print Export to Excel</li> </ul>	2 payments 2 payments 2 payments	\$1,028.50 \$80.23	0 Denied Tr 0 Denied Trans	ansactions 0 Refunded	led Transactions Transactions	0 Voided 1	ransactions		



4. The **Detailed Info** panel displays totals by date.

9	Mon, Jul 09, 2018	1 payments	\$137.78	0 Denied Transactions	0 Refunded Transactions	0 Voided Transactions
•	Fri, Jul 06, 2018	4 payments	\$117.26	0 Denied Transactions	0 Refunded Transactions	0 Voided Transactions
•	Thu, Jul 05, 2018	2 payments	\$0.10	0 Denied Transactions	0 Refunded Transactions	0 Voided Transactions
•	Tue, Jul 03, 2018	6 payments	\$0.37	1 Denied Transactions	0 Refunded Transactions	0 Voided Transactions

6. Click the 👩 button to expand the transaction details for a selected date.

ARD TYPE	HOUR	CARD NUMBER	AUTHORIZED	SWIPED	AMOUNT	AUT#	AVS	CV	MESSAGE	REFUNDED AMOUNT	VOIDED AMOUNT	
ISA	06:00 PM	6240	REFUNDED		\$0.01	077995			SUCCESS	\$0.01	\$0.00	🔊 Refund
ISA	06:00 PM	6240	AUTH	¥	\$0.01	060574			SUCCESS	\$0.00	\$0.00	
ISA	06:00 PM	6240	AUTH		\$0.01	064395			SUCCESS	\$0.00	\$0.00	
ISA	10:16 AM	6240	REFUNDED	¥	\$0.03	072607			SUCCESS	\$0.03	\$0.00	🔊 Rdun
ISA	10:10 AM	6240	VOIDED		\$0.05	083228			SUCCESS	\$0.05	\$0.00	🔊 Refun
ISA	10:05 AM	6240	REFUNDED	¥	\$0.03	005952			SUCCESS	\$0.01	\$0.00	🔊 Rolur
ISA	09:42 AM	6240	AUTH		\$0.02	071950	STREET	GOOD	APPROVED 071950	\$0.00	\$0.00	
ISA	09:40 AM	6240	REFUNDED		\$0.06	007627	STREET	GOOD	APPROVED 007627	\$0.03	\$0.00	Refur

7. Click a transaction on the **Detailed Info** panel. A pop-up window displays the details for the selected transaction.

Note: If you do not see the "Process Refund" option, please check if the user that is logged in has permission to do refunds (see Cashier configuration, page 3)





# Reports

The **Reports** option allows you to view summary and detailed transaction activity as well as a customer report for all those customers who have made payments.

#### **Customers Report**

1. Click the Reports tab. Click Customers to view your customers report.

BLACKSTONE	Dashboard	Reports	Make Payments	Invoicing	Cashiers	Gift Cards	Business Settings	User Settings
		Payment	s					
Home / Dashboard								
Dashboard								
This Month								
	-	51,259. Total Am	80 ount				3 Ions	

### 2. View your customers report

С	ustomers										
	Customers Rej	oor	t								
	Client ID		First Name	Last Name	Email	Street	City	Zip :	Country :	Phone	
	07051		Mike	Thompson	mikethompson@test.com	11600 NW 34th Street	miami	33178	USA	7862226678	
	07033		Kaitlin	Telles	catalinatest@gmail.com	11600 NW 34th Street	miami	33178	USA	3054265595	
	H H 1 2	÷								11 - 14 of 14 items	Ċ



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## **BUSINESS SETTINGS**

This option allows you to view and request changes to your bank account and transactions settlement settings.



#### **Bank Account**

To view your bank account information:

- 1. Click Business Settings.
- 2. The **Bank Account** page is automatically displayed. Your current bank account information is displayed on the top panel.

Bank Account	Daula Assaut		
Settlements	Bank Account		
Business Logo		A	
Oradit Card Varification		Account	
Credit Card Vernication	Bank: WACI	HOVIA BANK	
Labels & Reports Configuration	Routing Number: XXXX	X6432	
	Account Number: XXXX	XXXXX1331	
	Account Number: XXXX Change Account Account Type	int	
	Account Number: XXXX Change Account Account Type Checking	xxxxx1331	
	Account Number: XXXX Change Account Account Type Checking New Routing Number	* * *	
	Account Number: XXXX Change Account Account Type Checking New Routing Number A nine digits number	* * *	
	Account Number: XXXX Change Account Account Type Checking New Routing Number A nine digits number New Account Number	INT Confirm Account Nurr	ıber

#### Change Bank Account

To change your bank account:

 On the Bank Account page, click the Account Type drop-down button and select your new account type.



2. In the **New Routing Number** field, enter your Bank routing number. This is the 9digit number located at the bottom left corner of your checks, as illustrated on the screen.

/ Change Account		
Account Type	1	
Checking		
New Routing Number		
New Account Number	Confirm Account Number	



Save Chang

- 3. Enter your new bank account number in the New Account Number and the Confirm Account Number fields.
- 4. Enter your **Password** and click **Save Changes** to submit your request.

Account Type		
Checking	MEMO	-
New Routing Number	.:00000000:	
New Account Number	Confirm Account Number	
0		
Password		

5. A message displays notifying you that your request has been sent.

✓ Your request has been sent!
Your request may take a few days to take effect since it involves bank information processing.
Until these changes are executed, you will continue using your current bank information.

**Note:** Your request may take a few days to take effect since it involves bank information processing. Until these changes are executed, you will continue using your current bank information.

You will receive notification from Blackstone Merchant Services once your request is executed.



#### **Settlements**

This section displays your transactions settlement options and allows you to change your subscription from or to Automatic Settlements. Automatic Settlement means that your processed transactions will settle automatically (without manual intervention) every day at the specified time of settlement.

If you subscribe to Automatic Settlements, you have the option to choose the time of settlements. If you do not subscribe to Automatic Settlements, you have to find the **Settlements** option on the **BlackstonePAY Gateway** and tap the **Settlement** button every day to settle your transactions.

BLACISTONE	Dashboard Reports Make Payments Invoicing Cashiers Gift Cards Business Settings User Settings
Bank Account	Settlements
Business Logo Credit Card Verification Labels & Reports Configuration	In this section you can define whether or not you want your payments to be settled automatically, and at what hour of the day they will be settled If you decide to settle your transactions manually, then you have to find this option on <b>Blackstone Swiper Application</b> and tap the <b>Settlement I</b> You can also unsubscribe from automatic settlements if you are currently using this service.
	Tap the Settlement button for the money to be deposited in your bank account.
	You are currently enrolled in Automatic Settlements Your payments will be settled every day at 06:00 PM Change Time of Settlements Unsubscribe from Auto Settlements

Subscribe to Automatic Settlements& for an email with the Daily Settlement Report

To enroll in Automatic Settlements:

1. On the **Settlements** page, click the **Enroll Now** button.

Bank Account	Settlements
	In this section you can define whether or not you want your payments to be settled automatically, and all what hour of the day they will be settled. If you docide to settle your transactions manually, then you have to first this option on <b>Blackstone Swear Application</b> and tap the <b>Settlement</b> button for the memory to be adjusted in your balance.comt. You can also unsubscribe from automatic settlements if you are currently using this service.
	You are currently not enrolled in Automatic Settlements.

- 2. Click the hour drop-down button and select the hour of day you wish to settle.
- 3. Check off to receive an email with the Daily Settlement Report
  - Note: The report will be sent to the email registered with your account.

You are currently enrolled in Automatic Settlements
Your payments will be settled every day at 06:00 PM
Please select the new hour of the day at which you want your payments to be settled every day.
12:00 PM
Would you like to receive an email with the daily settlement report?
Submit Cancel



- 4. Click Submit.
- 5. A pop-up window is displayed to confirm your request. Click **Yes** to confirm.
- 6. Your **Automatic Settlements** enrollment options are displayed.

Enroll in Auton	natic Settlements ×
Are you sure you want your	payments to be settled every day at 5:00 PM?
	Yes No
You are currently Your payments will be set	enrolled in Automatic Settlements ttled every day at 05:00 PM
Change Time of Settlements	Unsubscribe from Auto Settlements

You are currently not enrolled in Automatic Settlements.

Please select the hour of the day at which you want your payments to be settled every day.

-

05:00 PM

Submit Cancel

#### Change Time of Settlements

This function is available only if you are enrolled in **Automatic Settlements**.

1. On the Settlements page, click the Change Time of Settlements button.

Your payments will be settled every day at 05:00 PM Change Time of Settlements Unsubscribe from Auto Settlements

You are currently enrolled in Automatic Settlements

2. Click the hour drop-down button.





3. Select the hour of day you wish to settle every day.



You are currently enrolled in Automatic Settlements

Please select the new hour of the day at which you want your payments to be settled every day.

Your payments will be settled every day at 05:00 PM

•

Submit

4. Click Submit.

- 5. A pop-up window is displayed to confirm your change request. Click **Yes** to confirm.
- Automatic Settlements Change Request Are you sure you want to change the time for automatic settlements from 5:00 PM to 9:00 PM?
- 6. Your **Automatic Settlements** enrollment options are displayed.

You are currently enrolled in Automatic Settlements

Your payments will be settled every day at 09:00 PM

Change Time of Settlements Unsubscribe from Auto Settlements

#### Unsubscribe from Automatic Settlements

This function is available only if you are enrolled in Automatic Settlements.

1. On the Settlements page, click the **Unsubscribe from Auto Settlements** button.

You are currently enrolled in Automatic Settlements Your payments will be settled every day at 05:00 PM Change Time of Settlements Unsubscribe from Auto Settlements 2. Read the displayed notice before you continue.

**Note:** If you unsubscribe from Automatic Settlements, you will have to execute the settlements manually in the **Blackstone Swiper Application** to have your payments deposited in your bank

- 3. Click the **Yes** button to confirm your request or **No** to cancel.
- 4. The **Settlements** page displays your selected options.



Unsubscribe from Automatic Settlements

Unsubscribing from Automatic Settlements means that you will have to execute the settlements manually in **Blackstone Swiper Application**. Please notice that your

Are you sure you want to unsubscribe from Automatic Settlements?

money will be deposited in your bank account only when a manual settlement is

#### **Business Logo**

This function allows you to update your business logo with will be displayed in your invoices.

performed.



1. Click Business Settings tab then click Business Logo

#### 2. Click Choose File

- 2. Choose the logo you wish to upload from your computer.
- 3. Click Submit Logo





#### **Credit Card Verification**

This function allows you to choose what type of credit card verifications (anti-fraud features) you want to process your transactions with for maximum security.

Bank Account	
Bank Account	Card Verification
Settlements	
Business Logo	Verify Address (Determines whether or not the cardholder's address will be validated when processing a payment) Verify Zip Code (Determines whether or not the cardholder's address will be validated when processing a payment)
Credit Card Verification	Verify Zip Code (Determines whether or not the Zip code will be validated when processing a payment) Verify CV/CW2 (Determines whether or not the CV/CV/2 will be validated when processing a payment)
abels & Reports Configuration	Require per-transactions auto-deny flag

- 1. Click Business Settings tab then click on Credit Card Verification
- 2. On the Credit Card Verification page select the options you wish to verify when processing a transaction.
- 3. Click Save Changes

#### Labels & Reports Configuration

This function allows you to customize your payment frame (if applicable) and allows you to custom name specific fields in your transactions and customer report as well as your recurring billings report. Also, you will be able to enable/disable specific columns from your transactions, customer, & recurring billings report.

Bank Account	Labels & Reports Configuration Pa	yment Types Configuration Colors Config	uration
Settlements			
Business Logo	Labels & Reports C	onfiguration	
Credit Card Verification			
bels & Reports Configuration	Change Labels		
	Header1		
	Make a Payment	Client Id	First Name
	Header 2	Client ID	<ul> <li>Disabled          Enabled     </li> </ul>
	Setup a Recurring Payment	Description	Last Name
	Label 1	Payment Type	<ul> <li>Disabled          Enabler     </li> </ul>
	Login to your account to make yo	Marital Status	Client Id
	Label 2	Disabled      OEnabled	<ul> <li>Disabled          Enable     </li> </ul>
	Type of Payment		Description
	Label 3		<ul> <li>Disabled          Enabled     </li> </ul>
	Do you wish to setup a recurring		

- 1. Click Business Settings then click on both Labels & Reports Configuration tabs
- 2. To change the payment frame labels (if applicable) simply click on the header you wish to edit and a help box will appear indicating where this label is in the payment frame. Then fill in the text box.
- 3. To change the report headers simply click on the Client ID or Description text box to change what the header will display.
- 4. To change what information you want to view in your reports, enable or disable the following: First Name, Last Name, Client ID, Description.
- 5 Click Change Labels when finished



### **Payment Types Configuration**

This function allows you to add different payment types you wish to process in the virtual terminal. By default in the virtual terminal there is a description box. If you add different payment types these will be shows as a drop down box in the virtual terminal and when adding a new recurring billing.

BLACKSTONE	ashboard Reports Make Payments Invoicing Cashiers Gift Cards Business Settings
Bank Account	Labels & Reports Configuration Payment Types Configuration
Settlements	
Business Logo	Payment Types Configuration
Credit Card Verification	Add Transaction
	Transaction Transaction
	Add

- 1. Click **Business Settings** then click **Labels & Reports Configuration** on the left side and then click **Payment Types Configuration**
- 2. If you wish to add different payment types to choose from when processing a transaction simply type in the payment type and click **add**

**Note**: The payment type information can be enabled/disabled in the transactions and recurring billings reports.



# VIRTUAL TERMINAL & BILLINGS

This option provides the following functions:

- Process payments using the Virtual Terminal
- Add Recurring Billing
- View Active Billings
- View Bill Payments History
- Exceptions List Lists any recurring billings that failed at the time of payment.

#### **Process Payment**

To process a payment using the Virtual Terminal function:

1. Click the **Make Payments** tab located at the top of the window.

BLACKSTONE	Dashboard	Reports	Make Payments	Invoicing

- 2. Select the transaction you wish to process.
  - Sale
  - Preauthorization
  - Force
  - Preauthorization Close



 Click the cashier drop-down button and select the cashier you will use to process the payment.



4. Fill out the card information



5. Enter the customer's information.

**Note:** This section is not required to process a payment transaction but is recommended. The only fields mandatory are Zip Code & E-mail. A receipt is sent to your customer when the Email address is entered. The receipt will include the payment description entered in the **Payment Details**.

 Click the Process Payment button located at the bottom of the page to submit the payment.

### **Add Recurring Billing**

- 1. Click the **Make Payments** tab located at the top of the window.
- 2. Click Add Recurring Billing on the left panel.
- 3. The Add Recurring Billing page is displayed.

**Note**: There are two types of billings available:

- a. Recurring A predetermined payment amount is charged on each billing cycle.
- Installment The payment amount is calculated by dividing the total amount due by the installment count.









- 4. For **Recurring** payments:
  - a. Select Recurring.
  - b. Click the **Select Frequency** dropdown button and select the payment frequency.
  - c. Click the calendar button associated with the **Starts On** field and select the payments starting date.
  - d. Click the calendar button associated with the **Ends On** field and select the payments ending date.
  - e. In the **Description** field, enter a payment description. The description entered is included in the receipt that is sent to your customer when an email address is available.
- 5. For Installment payments:
  - a. Select Installment.
  - b. In the **Installment Count** field, enter the number of installment payments.
  - c. Click the **Select Frequency** dropdown button and select the payment frequency.
  - d. Click the calendar button associated with the **Starts On** field and select the payments starting date.
  - f. In the **Description** field, enter a payment description. The description entered is included in the receipt that is sent to your customer when an email address is available.
- 6. Enter the Payment Details.

**Note**: When you click a payment card field, a payment card image displays highlighting the location of the required information.



illings	🗘 Billing Details
History	
List	Select Type of Billing <ul> <li>Recurring Installment</li> <li>Installment Count *</li> </ul>
	Select Frequency Monthly
	Starts On * Aug 01, 2013
e	Description *





7. Enter the Client Details.

First Name *	Client Details	
Last Name *  Last Name *  Street *  City *  State *  Armed Forces - AA  Zip Code *  Phone *  Email *  [	First Name *	
Last Name *		
Street *  City *  State *  Armed Forces - AA  Zip Code *  Phone *  Email *  I	Last Name *	
Street *  City *  State *  Armed Forces - AA  Zip Code *  Phone *  Email *  I		
City * City * State * Armed Forces - AA C Zip Code * C Email *	Street *	
City *  State *  Armed Forces - AA  Zip Code *  Phone *  Email *		
State * Armed Forces - AA  Zip Code *  Phone *  Email *	City *	
State * Armed Forces - AA  Zip Code *  Phone *  Email *		
Armed Forces - AA	State *	
Zip Code *  Phone *  Email *	Armed Forces - AA	•
Phone *	Zip Code *	
Phone * Email *		
Email *	Phone *	
Email *		
	Email *	

8. Click Save Billing to submit.

### **Edit/Remove a Recurring Billing**

- 1. Click the Make Payments tab located at the top of the window.
- 2. Click View Active Billings on the left panel.



3. All your active recurring billings are displayed.

		Active	Billings									
		Billing Type	Amount	Collected	Card	Frequency	Added On	Last Payment Date	Next Payment Date	Client		
		Recurring	\$0.04 (Each cycle)	\$0.00	<b>VISA</b> 6240	Weekly	Jul 03, 2018 @ 09:47 AM	[NO PAYMENT YET]	Wed, Jul 04, 2018	Kaitlin Telles	Remove	Edit
		Recurring	\$0.04 (Each cycle)	\$0.00	VISA 6240	Weekly	Jun 28, 2018 @ 09:27 AM	[NO PAYMENT YET]	Fri, Jun 29, 2018	John Smith	Remove	Edit
4.	To edit a recur	ring bill	ing click	Edit.				Edit Bill	ing			
5.	To delete a rec	curring	billing cl	ick <b>Re</b>	emove	2		Amount:	0.04 Weekly		•	
								Recurrence Sta	art: 2018-07-04			
								Recurrence En	d: 2018-07-08			
								Submit				



# INVOICING

### **Send Invoice**

1. Click the **Invoicing** tab located at the top of the window.

BLACISTONE	Dashboard	Reports	Make Payments	Invoicing	Cashiers

2. The **Send Invoice** page is displayed.

The **FROM** field contains your merchant account name and address. If necessary, you can enter any changes by simply typing over the information.

- In the TO field, enter the Customer Name and Email address. These are required fields. The Customer Address is optional.
- 4. In the **Invoice #** field, enter an invoice number.
- 5. Click the **Invoice Date** field and select the invoice date from the dropdown calendar.

6. Click the **Due Date** field and select the invoice due date from the dropdown calendar.

-	Send Invoice		
Paid Invoices	EDOM		
Unpaid Invoices	BLACKSTONE MERCHANT SERVICES INC	IN	VOICE
	11600 NW 34 ST DORAL FL 33178		
	TD Invoice	e# Inv	voice #
	New Customer • Invoice	e Date 7/1	10/2018 7 5
	First Name Due Da	te Du	ie Date  🔟
	Last Name		
	Client ID		
	Customer Email		
	Customer Address		
	Item Description Unit Price Quantity	Discount	Amount
	Reproduct V Capital Campaign V 0.00 0.00	0.00	0.00
	Otlew Item		
	s	ubtotal	0.00
	Invoice Notes If you need to add comments for this invoice, please do so here.	ax Rate	96 0.00
	Ta	ax	0.00
			0.00
	0	ther	3 0.00





7. If the invoice is for a service, click the Product dropdown button and select Service.

- 8. In the **Description** field, enter a brief description for the invoice item.
- Enter the Unit Price and Quantity for 9. the line
- 10. If applicable, enter the discounted amount in the **Discount** field.
- 11. The total amount for the line item is automatically calculated and displayed in the Amount field.
- 12. If you need to add more items, click the New Item button. A new line item is displayed. Repeat steps 7 to 11 to add the item.
- 13. To add a sales tax, enter your Tax Rate as a whole number.
- 14. In the **Other** field, you can enter any other charge amount.
- 15. In the Invoice Notes field you have the option to add comments.
- 16. Verify your contact information at the bottom of the invoice.

If you need to make any changes, you can edit the information by simply typing over it.





	Item	Description	Unit Price	Quantity	Discount	Amount
×	Product 💌	Samsung Galaxy SIV	599.00	1.00	0.00	599.00
×	Product 💌		0.00	0.00	0.00	0.00
C	New Item					





If you	have any q	uestion about this invoice, pleas	e contac	, (305) 191-9191	, testbms@bms.com
Pre	eview	Submit			

ne Unit Price and Quanti	l
e item.	



#### **BlackstonePAY Gateway**

Options

17. Click **Preview** to preview the invoice.



Firefox prevented this site from opening a pop-up window.

Note: If the message "Your browser prevented this site from opening a pop-up window." appears at the top of your window, click the displayed **Options** button and allow access.

18. A **Preview** of the invoice is displayed in a pop-up window.

Close the pop-up window to proceed.

bout: <b>blank</b>					
nis in	voice has been issued	by TEST E	3MS		
F <b>ROM</b> TEST BMS 11600 NW	/ 34th Street MIAMI, FL, 33131			INV	/OICE
<b>TO</b> ABC Comp nmcdermc	bany tt@blackstoneonline.com		Inv Inv Du	roice #: 2 roice Date: A e Date: S	:013456 ug 15, 2013 Sep 14, 2013
Item	Description	Unit Price	Quantity	Discount	Amount
Product	Samsung Galaxy SIV	599.00	1.00	0.00	599.00
Service	Activation	15.00	1.00	0.00	15.00
Invoice N	otes		s	ubtotal	614.00
Overnight :	shipping fee: \$10.00		т	ax Rate	7.00%
			т	ax	42.98
			0	ther	10.00

19. When done, click Submit.





BLACKSTONE	Payments Cashiers Virtual Terminal & Billings Invoicing Business Sottings User Settings Welcome, <b>LTEST BM</b>
Send Invoice	Success
Inpaid Invoices	
	Your invoice has been successfully sent!



#### **Customer Receives Invoice**

 Customer receives invoice via email. The customer is instructed to click the link to view and pay the invoice in the Blackstone Merchant website.



2. The Blackstone Merchant window opens displaying the invoice with the **Payment Details** in the lower panel.

3. The customer enters the payment information and submits the payment.

TESTBMS 11600 NW 348	h Street MIAMI, FL, 33131			IN	VOICE	
TO ABC Company nmcdermott@	blackstoneonline.com		Invo Invo Due	ice #: ice Date: Date:	2013456 Aug 15, 2013 Sep 14, 2013	
Item	Description	Unit Price	Quantity	Discount	Amount	
Service !	Samsung Galaxy SIV	599.00	1.00	0.00	599.00	
Service	lectivation	15.00	1.00	0.00	15.00	
Invoice Note	\$		Su	btotal	614.00	
Overnight ship	ping fee: \$10.00		Таз	Rate	7.00%	
			Tax		42.98	
			oth	ier	10.00	
	If you have any question about this invoice, please	contact TEST BMS, (305) :	91-9191, testbm	s@bms.com		
Paymen	t Details					
Amount	\$666.98					
Card Holde	r Name					
sana monue	Date					
Expiration						
Expiration Security Co	ode					

Payment Detail	s
Amount	\$666.98
Card Number	4275315603725493
Card Holder Name	John Doe
Expiration Date	Jan, 2019 🔛
Security Code	123
Zip Code	33156
	Submit Payment



### **Paid Invoices**

1. On the **Invoicing** page, select **Paid Invoices**.

C Invoice	× Invoice		× Invoice	×			
stonemerchant.com/app/	/Invoicing/PaidI	Invoices					2
Payments	Cashiers	Virtual Terr	minal & Billings	Invoicing	Business Settings	User Settings	Welcome, LTEST BMS -
Paid Invo	oices						
Invoice Number	Custome	er Name	Issued Date	Total	Paid On	Payment Card	Reference Number
2013456	ABC Com	npany	Aug 15, 2013	\$666.98	Aug 16, 2013	VISA 4566	GKJ392847H
	Dinvoice Invoice Payments Paid Invoc Invoice Number 2013456	Invoice      X     Invoice     Invoice     X     Invoice     Payments     Cashiers      Paid Invoices      Invoice Number     Custome     2013456     ABC Con	Invoice   Invoice  I	Invoice x Invoice x Invoice x Invoice to nemerchant.com/app/Invoicing/PaidInvoices     Payments Cashiers Virtual Terminal & Billings      Paid InvoiceS     Invoice Number Customer Name Issued Date     2013456 ABC Company Aug 15, 2013	Invoice x Invoice x Invoice x Invoice x Invoice x Invoice Payments Cashiers Virtual Terminal & Billings Invoicing Paid Invoices Invoice Number Customer Name Issued Date Total 2013456 ABC Company Aug 15, 2013 \$666,98	Invoice x Payments Cashiers Virtual Terminal & Billings Invoicing Business Settings Paid InvoiceS Invoice Number Customer Name Issued Date Total Paid On 2013456 ABC Company Aug 15, 2013 \$666.98 Aug 16, 2013	Invoice x Invoi

2. Select an invoice from the displayed list to view the invoice details.

A new window opens displaying the selected invoice.

C. and C.					Name of Street, or other			
Paidinvoices				× \ []	Invoice	×		- (A
	ackstonemercha	nt.com/app/invoicing/Getinvoice//8c	31/00-2/90-46/1-9094-53	45032D1C84				ਡ =
	This in	voice has been issu	ed by TESTB	MS				
							1	
	FROM TESTBMS				INV	/OICE		
	11600 NW	34th Street MIAMI, FL, 33131						
	TO ABC Comp	anv		Invo	oice #: 2 pice Date: A	013456 ug 15, 2013		
	example@	someemail.com		Due	Date: 9	ep 14, 2013		
	Item	Description	Unit Price	Quantity	Discount	Amount		
	Product	Samsung Galaxy SIV	599.00	1.00	0.00	599.00		
	Service	Activation	15.00	1.00	0.00	15.00		
	Invoice No	otes		Su	ıbtotal	614.00		
	Overnight s	shipping fee: \$10.00		Ta	x Rate	7.00%		
				Ta	x	42.98		
				Ot	her	10.00		
					OTAL	\$000.98		
		If you have any question about this invoice.	please contact TEST BMS, (305	) 191-9191, test	tbms@bms.co	m		1
					ALC: NO			
								2
							State Barris	
					Constant of the second			



### **Unpaid Invoices**

1. On the **Invoicing** page, select **Unpaid Invoices**.

PaidInvoices × $\leftarrow \Rightarrow C \triangleq https://blacks$	stonemerchant.com/app/Invoicing/LI	nnaidInvoices		
BLACISTONE	Payments Cashiers	Virtual Terminal & Billings	Invoicing Business Settings	User Settings Welcome, <b>L</b> TEST BMS -
Send Invoice Paid Invoices	Unpaid Invoice	es		
Unpaid Invoices	Invoice Number	Customer Name	Issued Date	Total
	ANG0002	Angel Paredes	Aug 24, 2013	\$1,156.06
	NIT132894	Nitza	Aug 22, 2013	\$801.43
	ANG3257	Angel Paredes	Aug 15, 2013	\$1,296.84
	INV034573G	Camilo Sanchez	Aug 13, 2013	\$439.87
	IN0934AH34	Ramon Ortega	Aug 13, 2013	\$500.00

2. Select an invoice from the displayed list to view the invoice details.

A new window opens displaying the selected invoice.

This inv	oice ha	as been issued b	Y TEST B	мѕ			
FROM TEST BMS 11600 NW 34	ith Street MIA	MI, FL, 33131			IN	VOICE	
TO ABC Company example@soi 123 Main Stre	y meemail.com set			Invo Invo Due	lice #: lice Date: Date:	NIT132894 Aug 22, 2013 Aug 30, 2013	
Item		Description	Unit Price	Quantity	Discount	Amount	
Product	iPhone		599.00	1.00	0.00	599.00	
Service	Pool Cleaning		200.00	1.00	50.00	150.00	
Invoice Note	5			Su	btotal	749.00	
This is a test	you have any r	weation about this invoice, please cont	ect TEST BMS, (305)	Tax Tax Ott 191-9191, test	k Rate k her DTAL bmsØbms.co	7.00% 52.43 0.00 \$801.43	
Paymen	it Detail	s					
Amount Card Num	her	\$801.43					
Card Hold	er Name	As it appears on your card					
Expiration	Date	Exp. Date					
Security C	ode						
Zip Code		Zip Code					
		Submit Payment					