

PCI – Processing a Payment

PCI – Processing a Payment

1.

Login to the Fusion portal
<https://innovation.fusiontelecom.co/login/>

innovation.fusiontelecom.co/login/#/

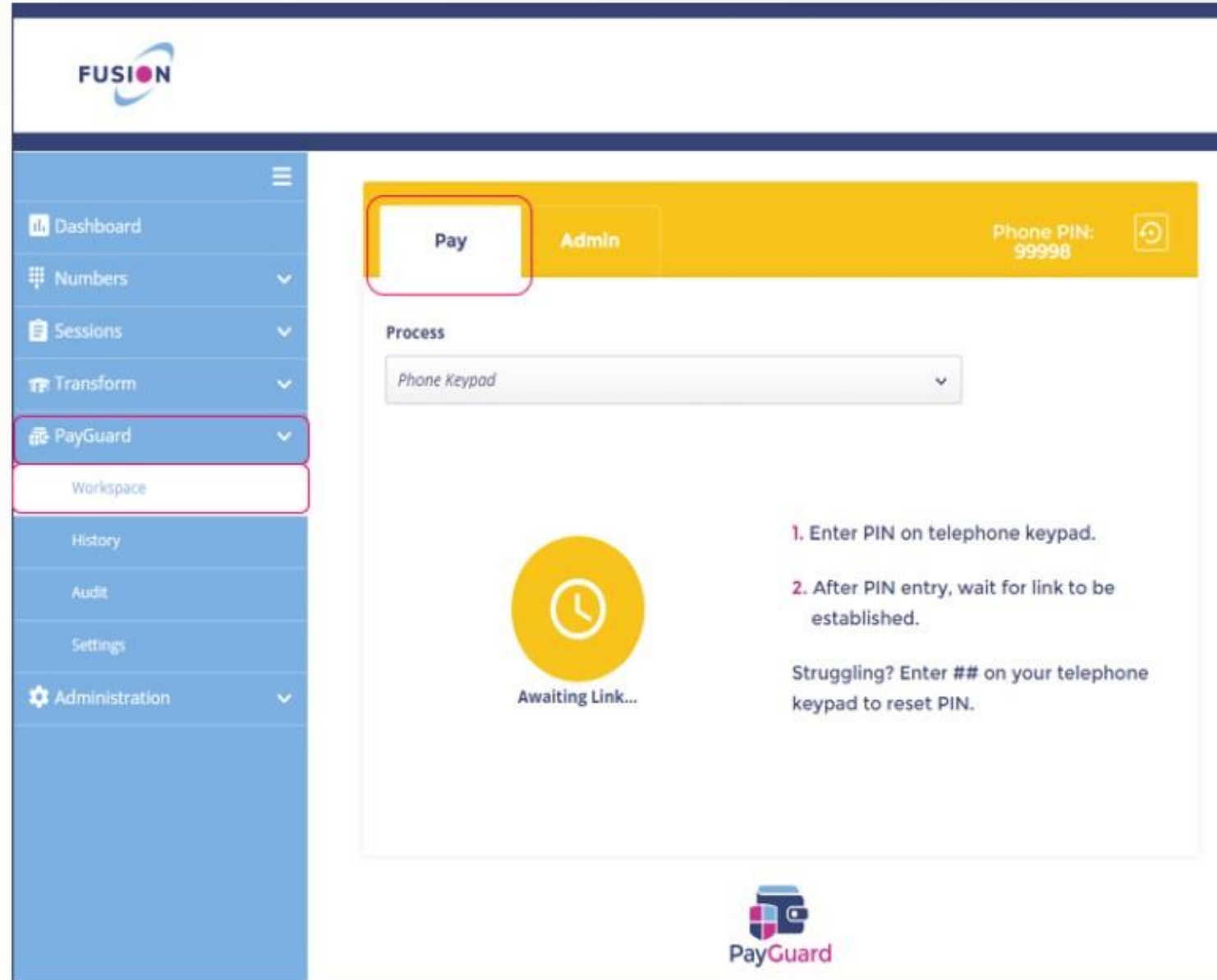
Hint

To change your password, select the settings cog in the top right of the screen and select 'Profile'
 Scroll to the bottom of the page and select 'Change Password'

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2.

Select '6', followed by 'Workspace', and then 'Pay'

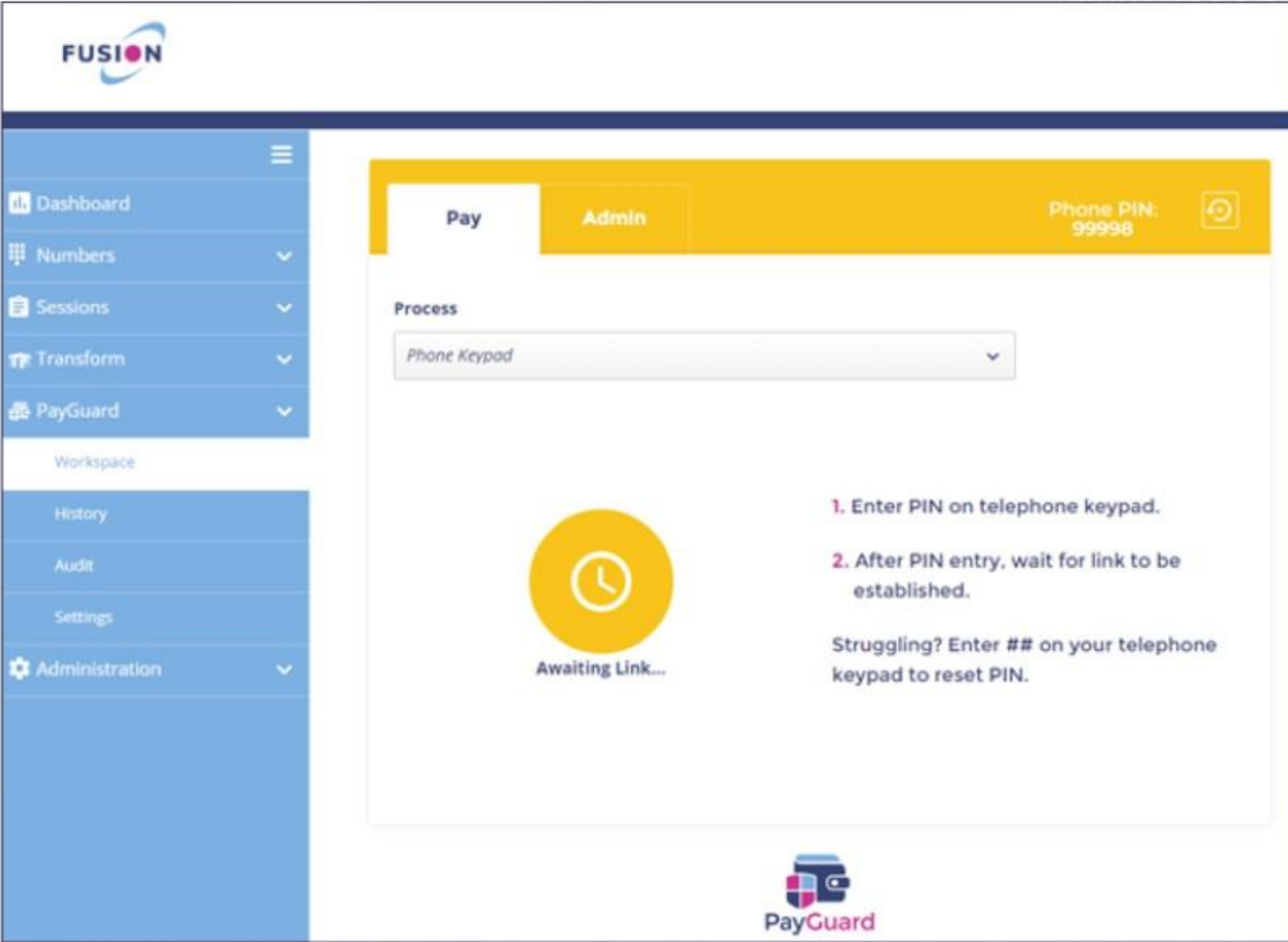


The screenshot displays the Fusion PayGuard interface. On the left is a blue sidebar menu with the following items: Dashboard, Numbers, Sessions, Transform, PayGuard (highlighted with a red box), Workspace (highlighted with a red box), History, Audit, Settings, and Administration. The main content area has a yellow header with 'Pay' and 'Admin' tabs, and 'Phone PIN: 99998' with a refresh icon. Below the header is a 'Process' section with a dropdown menu set to 'Phone Keypad'. A large yellow clock icon is centered with the text 'Awaiting Link...'. To the right of the icon are two numbered instructions: '1. Enter PIN on telephone keypad.' and '2. After PIN entry, wait for link to be established.' Below these instructions is the text 'Struggling? Enter ## on your telephone keypad to reset PIN.' The PayGuard logo is at the bottom center.

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3. When ready to activate a payment link, enter the phone pin into your handset (your pin will always stay the same)

The screen will change to blue (as shown on the next slide)



FUSION

Dashboard Numbers Sessions Transform PayGuard

Workspace

History Audit Settings Administration

Pay Admin Phone PIN: 99998

Process

Phone Keypad

Awaiting Link...

1. Enter PIN on telephone keypad.
2. After PIN entry, wait for link to be established.

Struggling? Enter ## on your telephone keypad to reset PIN.

PayGuard

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4.
The screen will change to blue to indicate the payment link has been initiated

The screenshot displays the Fusion Pay interface. On the left is a navigation menu with options: Dashboard, Numbers, Sessions, Transform, PayGuard, Workspace, History, Audit, Settings, and Administration. The main content area has a blue header with 'Pay' and 'Admin' tabs. A red box highlights this header. Below the header, the 'Process' section shows a dropdown menu set to 'Phone Keypad' and a green checkmark icon labeled 'Linked'. A table below has columns: Amount (with a currency symbol '£'), Date (with a calendar icon and '25/07/2022'), Reference (with 'Reference' text and a calendar icon), and Reoccur (with 'No' text and a dropdown arrow). An 'Add Payment' button is located to the right of the table. The 'Method' section at the bottom has a dropdown menu set to 'Choose an Option'. The PayGuard logo is centered at the bottom of the interface.

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5.

Enter the required fields:

- Amount
- Date
- Reference

6.

Select the practice site from the 'Method' drop down , then select 'Confirm'

The screenshot shows the Fusion Pay interface. On the left is a navigation menu with options: Dashboard, Numbers, Sessions, Transform, PayGuard, Workspace, History, Audit, Settings, and Administration. The main area is titled 'Pay' and 'Admin'. It features a 'Process' dropdown set to 'Phone Keypad' with a 'Linked' status indicator. Below this is a table with columns for Amount, Date, Reference, and Reoccur. The table contains one entry: £100.00, 25/07/2022, PAYMENT, and No. A total summary shows 'Total for today: £100.00' and 'Total of all payments: £100.00'. At the bottom, there is a 'Method' dropdown set to 'Training Gateway' and a 'Confirm' button. The PayGuard logo is visible at the bottom center.

| Amount | Date | Reference | Reoccur |
|---------|------------|-----------|---------|
| £100.00 | 25/07/2022 | PAYMENT | No |

Total for today: £100.00
Total of all payments: £100.00

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7. Enter in the client's name and address details that the card is registered to

FUSION

Dashboard Numbers Sessions Transform PayGuard

Workspace History Audit Settings Administration

Pay Admin

Process
Phone Keypad ✔ Linked

| Amount | Date | Reference | Reoccur |
|---------|------------|-----------|---------|
| £100.00 | 25/07/2022 | PAYMENT | No |

Total for today: £100.00
Total of all payments: £100.00

Method
Training Gateway

Name
Example

Address
Address the card is registered to

City Region/State Postal Code GB (Great Britain)

+ Add Payment

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8.

Ask the client to enter their card details on their device

Examples:

- *“Please enter your long card number, followed by the hash key”*
- *“Please enter the expiry date as a four-digit number, followed by the hash key, (January 2026 would be 0126)”*
- *“Please enter the three-digit security code shown on the back of the card, followed by the hash key”*

9.

Once complete, the card details will show on your computer screen along with the ‘Confirm’ button

Click ‘Confirm’ to proceed

The screenshot shows the PayGuard mobile application interface. On the left is a navigation menu with options: Transform, PayGuard, Workspace, History, Audit, Settings, and Administration. The main screen displays a payment summary table with columns for Amount, Date, Reference, and Reoccur. Below the table is a total for today of £100.00 and an 'Add Payment' button. The 'Method' is set to 'Training Gateway'. There are input fields for Name, Address, City, Region/State, Postal Code, and GB (Great Britain). The Card field shows a masked number '4242 - XXXX - XXXX - 4242', '16 digits', and '12/25'. A 'Confirm' button is at the bottom right. A note at the bottom says: 'Press ** to clear last field or *** to clear all fields'.

| Amount | Date | Reference | Reoccur |
|---------|------------|-----------|---------|
| £100.00 | 25/07/2022 | PAYMENT | No |

Total for today: £100.00
Total of all payments: £100.00

Method: Training Gateway

Name: Example

Address: Address the card is registered to

City: Region/State: Postal Code: GB (Great Britain)

Card: 4242 - XXXX - XXXX - 4242 (16 digits), 12/25

Confirm

Press ** to clear last field or *** to clear all fields

****PLEASE NOTE****

If the card details have been entered incorrectly, you can press the star key (*) twice on your telephone to clear the last field or three times to clear all fields

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10.

The final confirmation screen will show to allow you to review the payment details

If you need to make any changes, select the 'Edit Payment' button which will take you back to the previous screen (keeping the card and address details saved)

Click 'Submit' to complete the payment

FUSION

Confirm Payment

| Amount | Date | Reference |
|---------|------|-----------|
| £100.00 | Now | PAYMENT |

Total for today: £100.00
Total of all payments: £100.00

Method
Training Gateway

Name
[Empty field]

Address
Cambridge House, Westbury on Trym, BS9 3QG

| Card Number | Expiry Date | Security Code |
|---------------------------|-------------|---------------|
| 4242 - 42XX - XXXX - 4242 | 12/25 | XXX |

PayGuard

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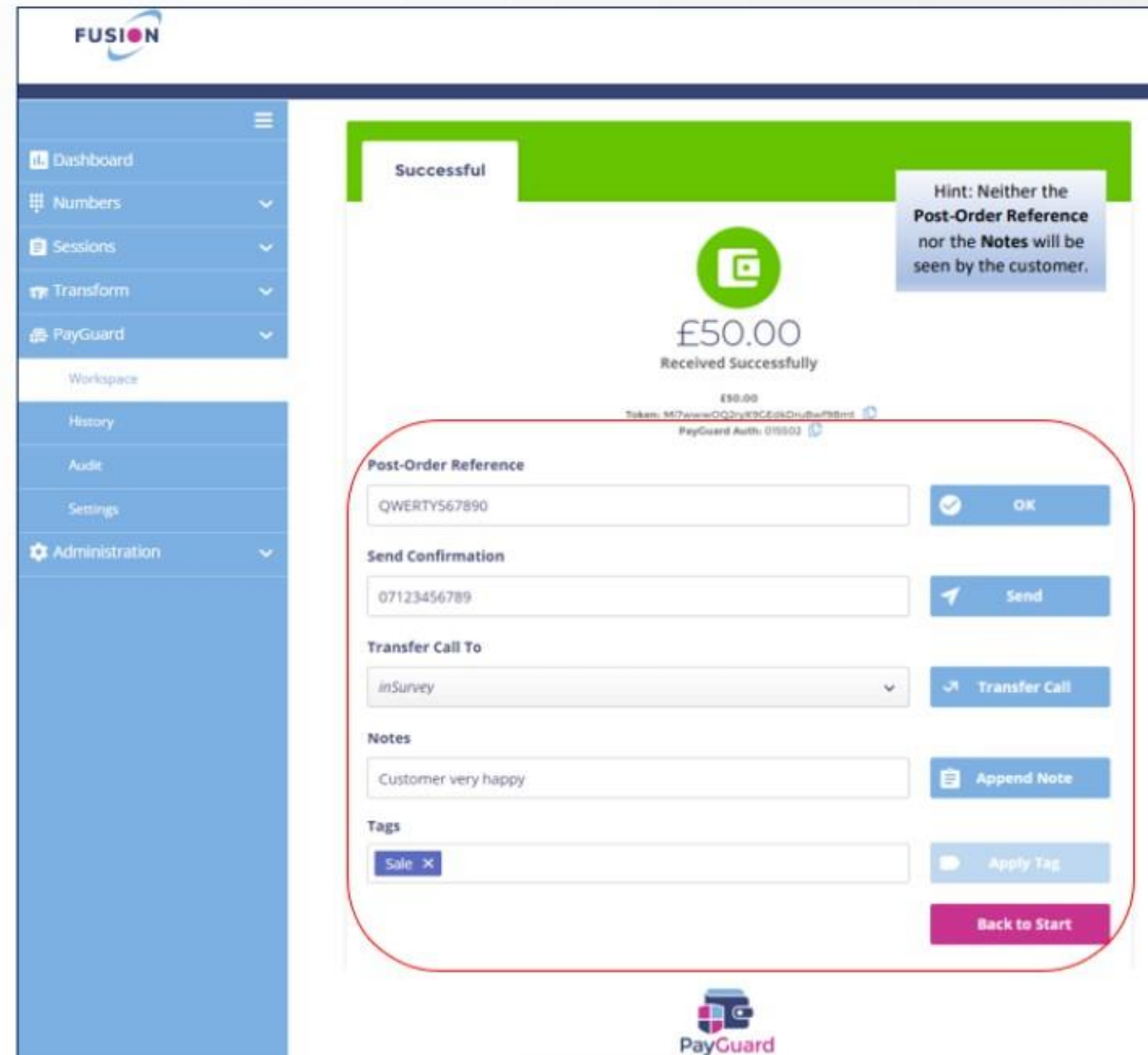
11.

If the payment is successful, this screen will show

You can send the customer a confirmation by email or SMS as well as notes and references

12.

Click 'Back to Start' to return to the home page



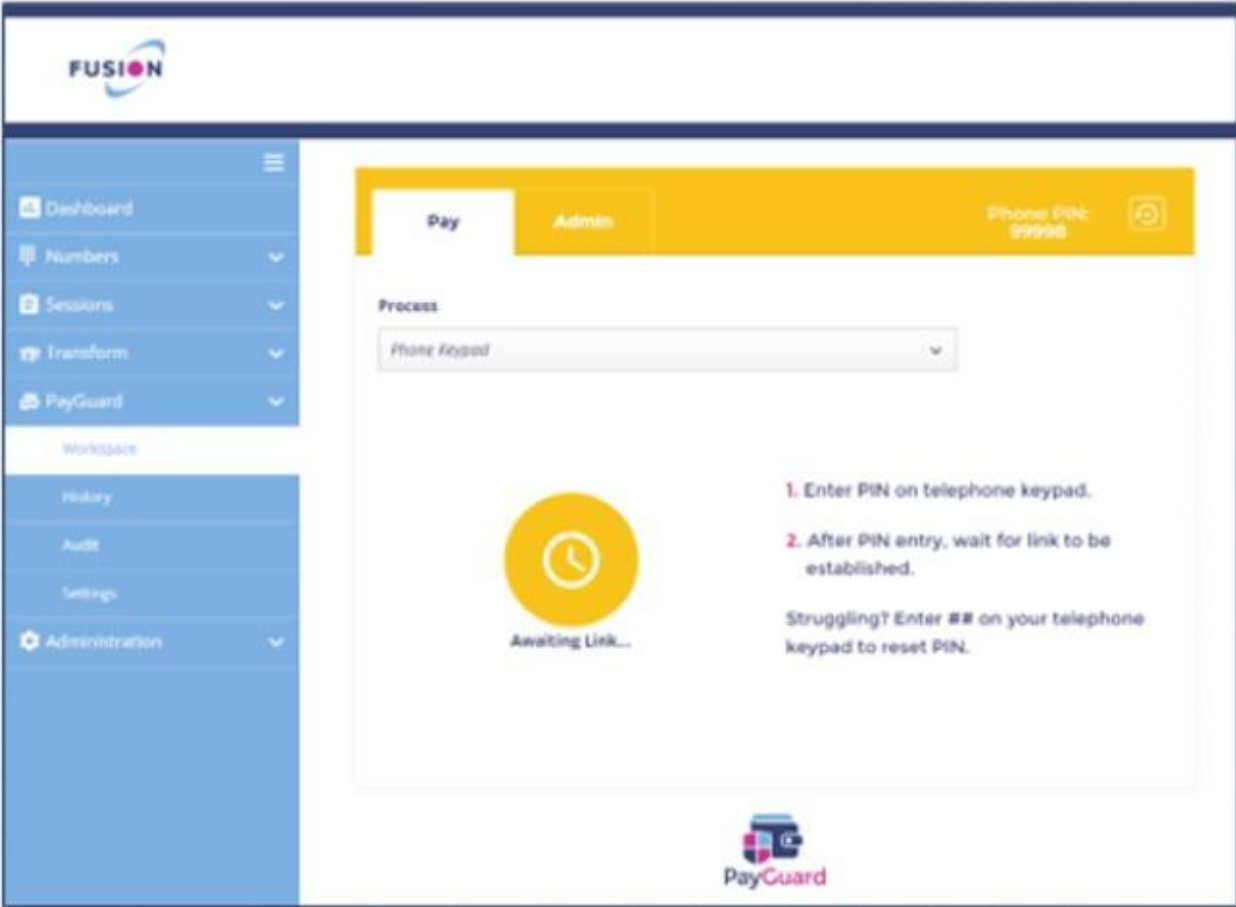
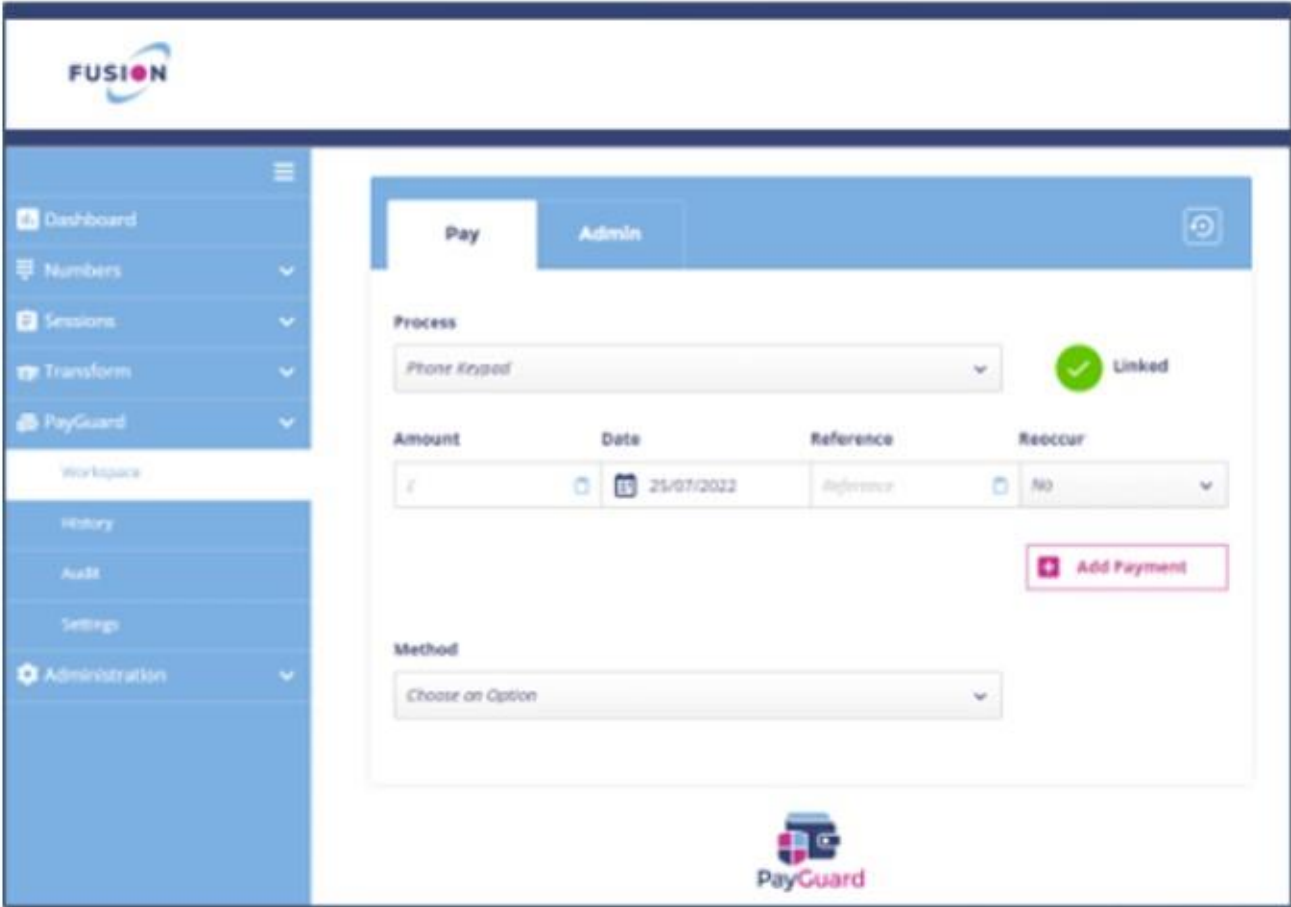
****PLEASE NOTE****

The email confirmation is not a receipt, this is just a confirmation that the payment has been processed via 6

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You will be redirected to the payment page, ready to proceed with another payment

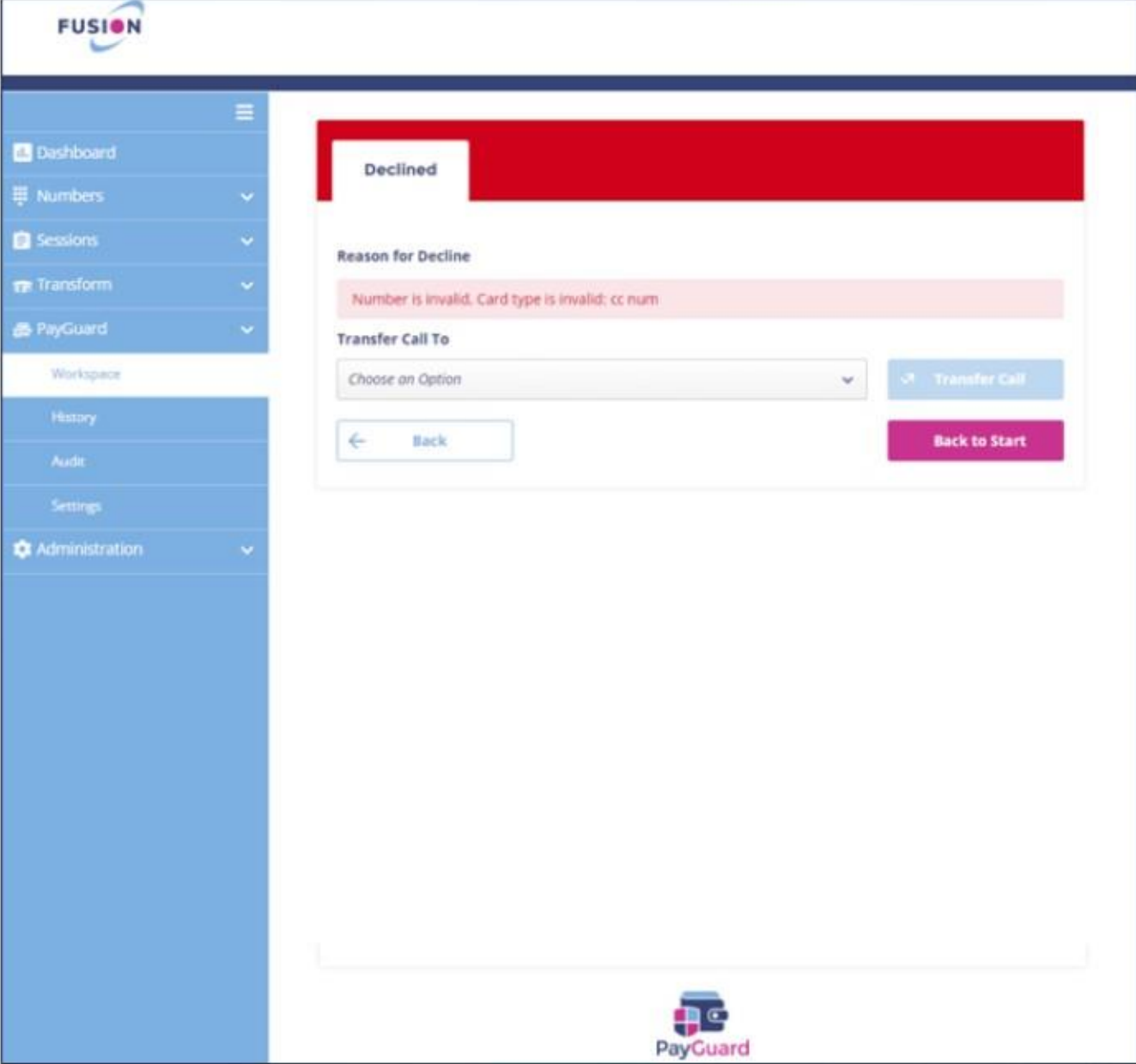
When you hang up the call, the screen will end the payment link and change it back to its idle state



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If the payment is declined, the system will confirm the reason

Click 'Back' to return to the previous screen to amend where necessary



The screenshot displays the Fusion PayGuard interface. On the left is a navigation menu with the following items: Dashboard, Numbers, Sessions, Transform, PayGuard, Workspace, History, Audit, Settings, and Administration. The main content area is titled 'Declined' and features a red header bar. Below the header, the 'Reason for Decline' is shown as 'Number is invalid, Card type is invalid; cc num'. The 'Transfer Call To' section includes a dropdown menu labeled 'Choose an Option' and a 'Transfer Call' button. At the bottom of the main area, there are two buttons: 'Back' and 'Back to Start'. The PayGuard logo is visible in the bottom right corner of the interface.

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Issues or questions? Contact us!

In Hours Support or Service Requests:

02036753399

cloudsupport@onecom.co.uk

onecom

www.onecom.co.uk