Elavon Converge

Payment

for Magento 2

User Guide

Version 1.0

Table of Contents

I) Introduction

Magento 2 Elavon Converge Payment lets you collect payments securely and quickly via the Elavon Converge gateway integrated into your Magento 2 store. It will keep sensitive customer data completely safe as the data never touches your server.

- Support various payment types
- Complete payment details right on checkout page
- Support 2 payment actions
- Save cards for future use
- Allow subscription & installment payments

# II) Where to Find Extension

After installing the extension, go to **Stores > Configuration > Sales > Payment Methods**.

On the right-hand panel, under the OTHER PAYMENT METHODS section, you can find the **Converge Gateway by Magezon** configuration panel. The configuration panel contains three sections:

- Converge Gateway by Magezon
- Basic Converge Payment Settings
- Advanced Converge Payment Settings
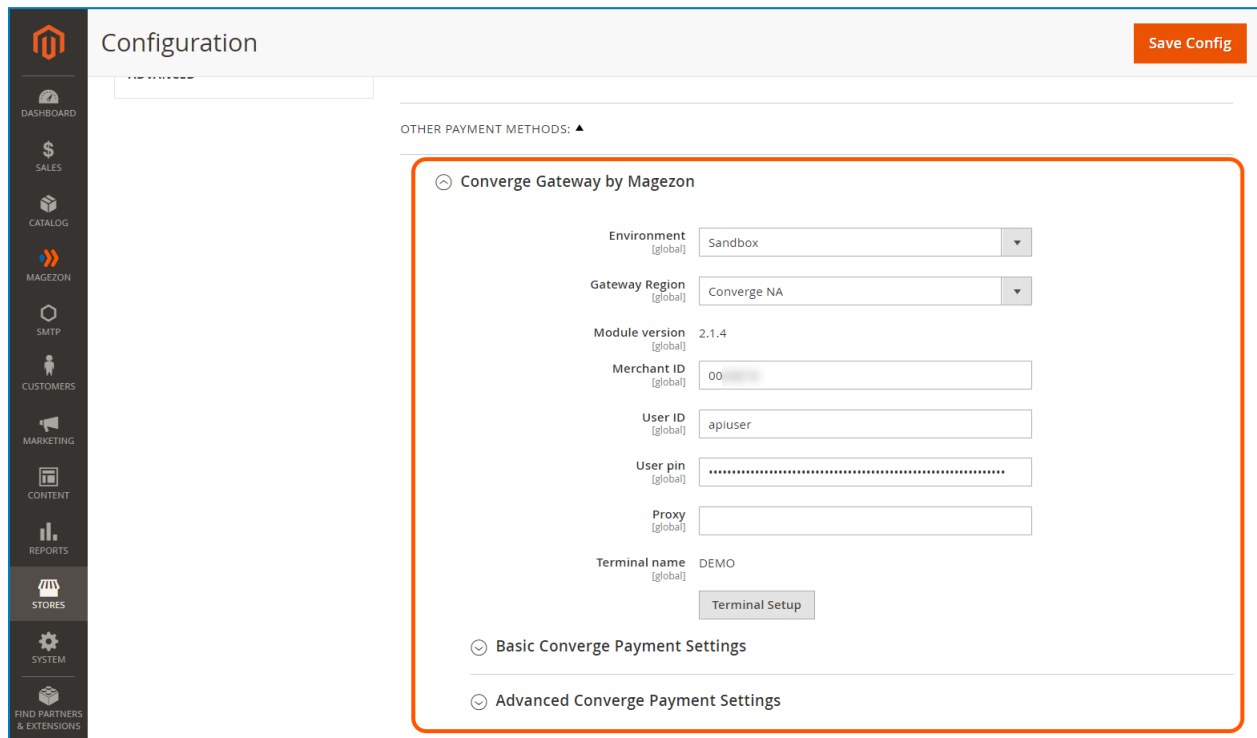
1. Converge Gateway by Magezon

This section is displayed under the title of the payment method. It contains the following fields:

- **Environment**: allow you to switch between Sandbox and Production environment. Select **Sandbox** to send transactions to a Converge demo account for testing the payment method. Choose **Production** to send transactions to a Converge live account.

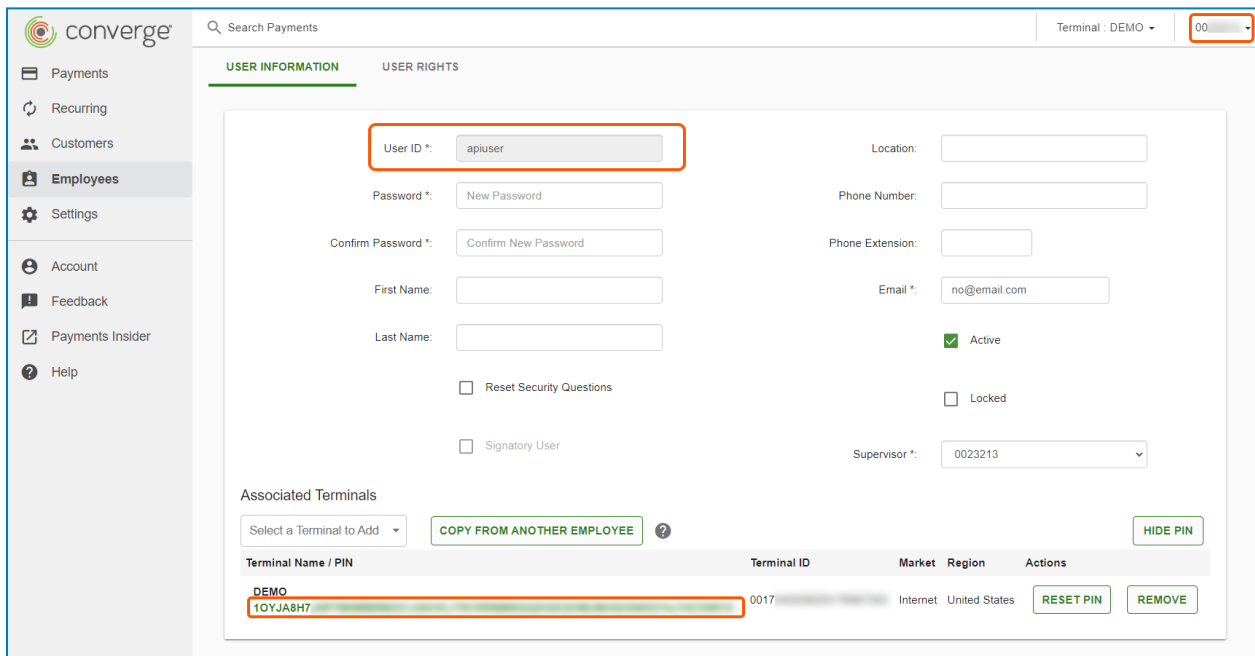 * **Note**: Use test cards when testing the integration.

- **Gateway Region**: this option has currently only one value, Converge NA. Converge EU will be added once the functionalities are available.

- **Module version**: show the currently installed version of Converge plugin.

- Enter the **Merchant ID**, **User ID** and **User pin** to connect your site to your Elavon Converge account.

* **Note**: Follow the steps below to find the above credentials:

- [Login to your Converge account](#).

- Go to **Employees** and select an employee.
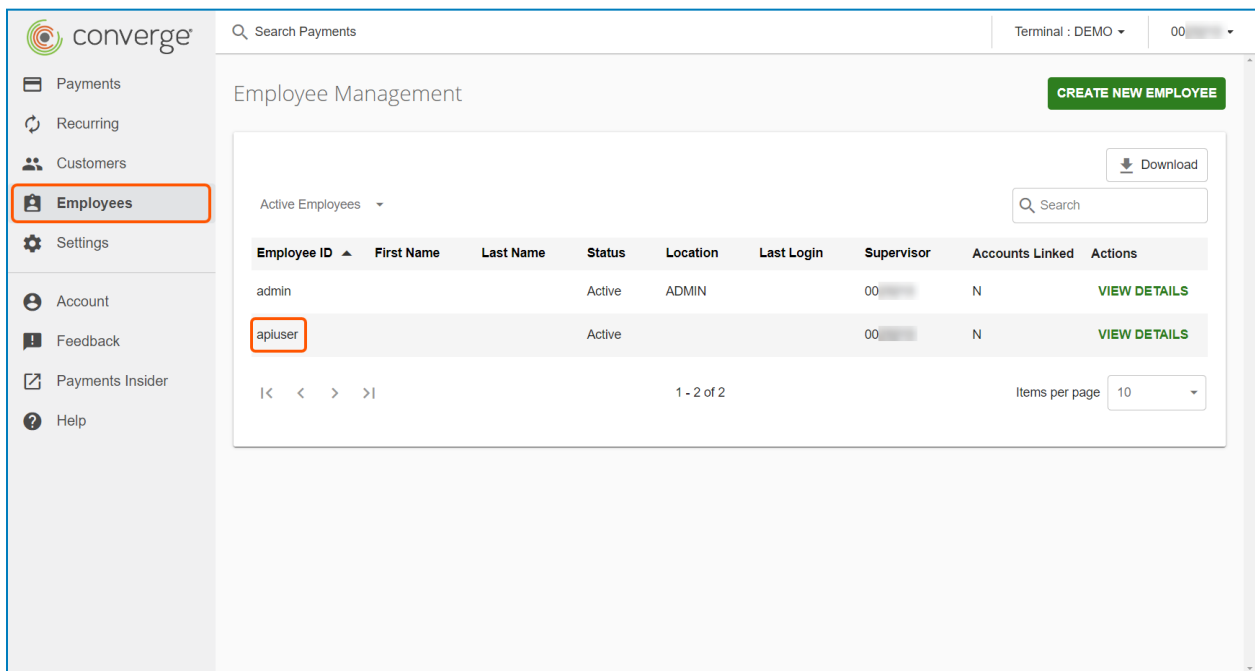
- On this page, you can find the **Merchant ID** (or Account ID) in the top-right corner, the **User ID** in the User Information section, and the **User pin** by clicking **Show PIN**.

- **Proxy**: this field should be filled with a string that is related to authentication and will be provided by contacting Elavon.

- **Terminal name**: this field represents the name of the Converge terminal you are connecting to. The value for this field is displayed after you click "Terminal Setup".

2. Basic Converge Payment Settings

- **Title**: enter a specific title of the payment method that is displayed on the frontend.

- **Enabled**: enable/disable this payment method on the checkout page.

- **Recurring/Installment Enabled**: the value for this field is determined based on the options supported by the terminal and cannot be edited. Also, the value for this field determines if the sections for subscriptions and installments from the product configuration are displayed or not.

- **Payment Action**: control how transactions are submitted to Converge.

❖ **Authorize**: the order amount will only be authorized on the credit card used for the transaction. And you will have to create an invoice from your Magento backend so that the credit card is charged.

❖ **Authorize and Capture**: the transaction will be authorized and the credit card is charged immediately. An invoice will be created automatically and no additional action is needed from your side for this transaction to be settled.

● **Integration Method**: there is only one available integration method option that is **Checkout.js (PCI SAQ A-EP)**. The payment data is collected right from your Magento 2 store's checkout page and sent to Converge for processing. Sensitive data won't touch your server allowing you to avoid the compliance burden for handling payment card information or personally identifying data.

● **License Code**: this value for this field is provided by Converge and should be sent with each transaction.

● **Doing Business As Name**: enter the DBA name that is provided by you with each transaction.

● **Save for later use message**: define a message that is displayed to the user when they are trying to save a card for later use.

● **Disclosure message for subscription/installment options**: define a message that is displayed to the user when he/she is trying to place an order with subscription/installment products. This message will be displayed to the customer next to the Place Order button.

3. Advanced Converge Payment Settings

- **Merchant Name**: this option is not editable and is loaded from Converge.

- **Region**: this option is not configurable and is loaded from Converge and used to limit the selection for other options like the **Language Translations**.

- **Payment Types Accepted**: this field is not configurable, and it displays the available options for the selected terminal. Besides the response from Converge Terminal, the options are influenced by the **Payment Action** type. If the Authorize option is selected, all options except Credit Card are removed.

  The possible values are: Credit Card, ACH, Gift Card. Please note that if the recurring functionality is enabled, gift cards will not be supported.

- **Credit Cards Accepted**: this field is not configurable, and it displays the available options for the selected terminal. The possible values are: VISA, Master Card, American Express, Discover, JCB (Japan Credit Bureau), CUP (China UnionPay).

- **Wallets enabled**: this field is not configurable, and it displays the available options for the selected terminal. The possible values are: Click to Pay, PayPal, Apple Pay. Please note that if the recurring functionality is enabled, wallets will be disabled. The wallets from this field will be hidden and replaced with the message "None - Recurring is enabled".

- **Currency Conversion**: the values for this option are loaded from Converge and used only to show the possible features in the future. The possible values are:
  - ❖ Multi-Currency Conversion – coming soon
  - ❖ Dynamic Currency Conversion – coming soon

- **Language Translations**: this field is a dropdown where the language options are displayed for a selected region. All the content in our Elavon Converge Payment extension will be translated.

- **Value Added Service**: values for this option are loaded from Converge, displayed to the user based on terminal settings. The possible values are:
  - ❖ **Recurring billing**: if this option is available for the terminal, you will be able to configure subscriptions for a product.
  - ❖ **Tokenization**: if the terminal allows tokenization, the customers will have the option to save cards for later use.
  - ❖ **Level 3 data**: this option allows sending additional data with each transaction based on the data provided by you as the merchant.
  - ❖ **3D Secure**: if this option is enabled for the terminal, the transactions will be authenticated using 3D Secure in case the card is enrolled in 3DS.

- **Log level**: this field allows you to define the level for the transaction processing issue logging. The options are Debug, Error, and Critical. These values indicate the severity, Debug being the lowest level and Critical being the highest one.

III) Payment via Converge Gateway

1. From Checkout Page

Customers have to access the checkout page to initiate a payment via Converge. After they populate *Shipping Address* (for products with weight) and click on the *Next* button, they will be presented with the *Review & Payments* page where they can select Converge Gateway as payment method.

Once a customer selects the Converge payment method, he/she will be presented with available payment types right on the checkout page. Based on each payment type, the customer should provide relevant details:

- Payment with a credit card includes **Credit Card Number**, **Expiration Date** and **Card Verification Number**.
- Payment with a gift card includes **Card number** and **Expiration Date**.
- Payment with Electronic Check (ACH) includes **Bank Routing/Transit Number**, **Bank Account Number**, **Check Number**, **Bank Account Type**, **First Name**, **Last Name** and to agree to the displayed message.

Payment Method

○ ◻ PayPal Express Checkout What is PayPal?

● Payment method (ConvergeGateway)

Michael Cao
556 Scranton Road
San Diego, California 92121
United States
0123456789

● Credit Card

MasterCard VISA AMERICAN EXPRESS JCB UnionPay DISCOVER

Credit Card Number *

```
**** **** **** ****
```

Expiration Date *

```
MM  /  YY
```

Card Verification Number *

```
****  (?)
```

☑ Save for later use. (?)

Order Summary

Cart Subtotal	$2,750.00
Shipping	$11.76
United Parcel Service - UPS Ground	

Order Total	**$2,761.76**

1 Item in Cart ⌄

Ship To: ✎

Michael Cao
556 Scranton Road
San Diego, California 92121
United States
0123456789
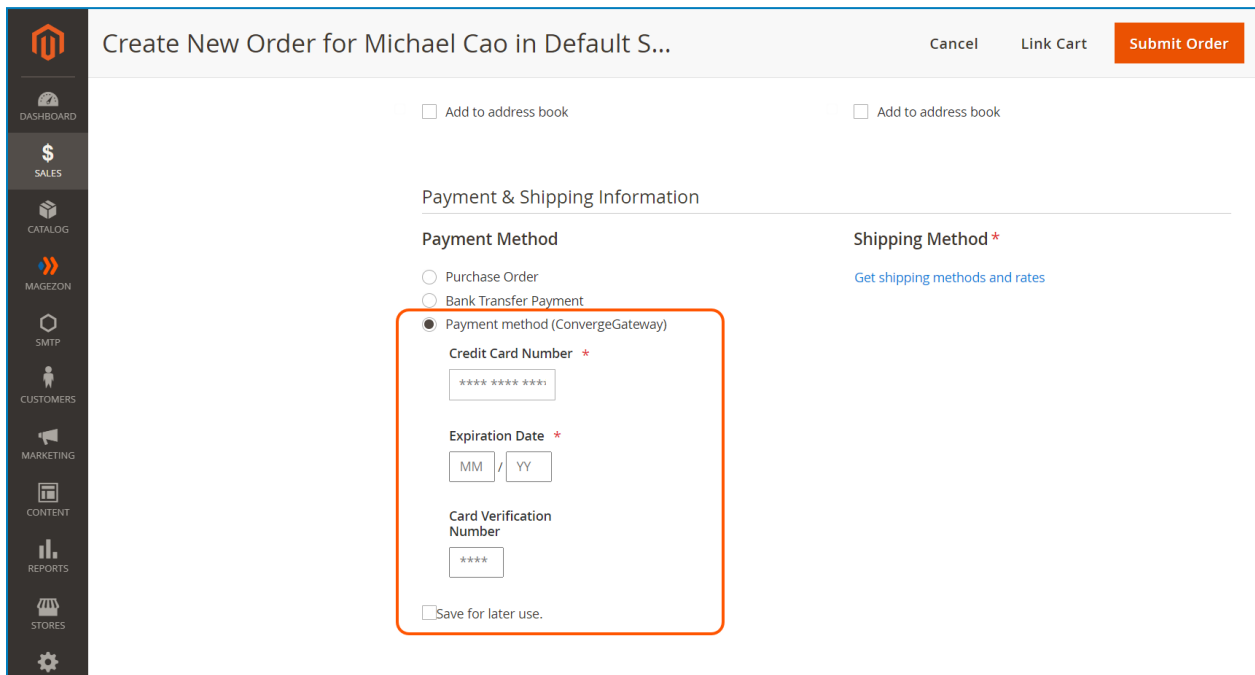
Shipping Method: ✎

United Parcel Service - UPS Ground

Place Order

2. When Creating New Orders in Backend

When you create a new order for a customer from your Magento backend, you can capture payments with **Payment method (ConvergeGateway)**. Choose a payment type and complete payment details.

3. View Payment Information

After customers successfully place an order, they can go to their account dashboard, open the **My Orders** section and view the order with payment information.

On the order view page in the backend, you can view the payment information:

ORDER VIEW

- Information
- Invoices
- Credit Memos
- Shipments
- Comments History
- Transactions
- Installments

Order & Account Information

Order # 000000543 (The order confirmation email was sent)

Order Date	Jul 16, 2023, 8:39:19 PM
Order Status	Complete
Purchased From	Main Website Main Website Store Default Store View
Placed from IP	14.248.94.137

Account Information Edit Customer

Customer Name	Michael Cao
Email	
Customer Group	General

Address Information

Billing Address Edit

Michael Cao
556 Scranton Road
San Diego, California, 92121
United States
T: 0123456789

Shipping Address Edit

Michael Cao
556 Scranton Road
San Diego, California, 92121
United States
T: 0123456789

Payment & Shipping Method

Payment Information

Payment method (ConvergeGateway)

Payment Type:	CARDVERIFICATION
Credit Card Number:	40******6781
Transaction Type:	CARDVERIFICATION
AVS Postal Code Response Code:	Unknown
Processor Authorization Code:	N39002
Processor Response Code:	0
Processor Response Text:	APPROVAL
3DS Authentication Status:	Not Authenticated

The order was placed using USD.

Shipping & Handling Information

United Parcel Service - UPS Ground $11.76

IV) Save Cards for Later Use

1. Save Cards

Logged in customers can store a credit card to use for future payments without filling out the card details again and again. On the *Review & Payments* page during the checkout, tick the **Save for later use** checkbox. If you click on the question mark icon, a message will be displayed (This message is defined in the **Save for later use message** field in the configuration).

2. View Saved Cards From Customer Account Dashboard

Customers can view all stored cards from their account dashboard in the **Stored Payment Methods** section:

- Click **Delete** to delete a stored card and click **Edit** to edit the Expiration Date and the Card Verification Number for a stored card.
- Click the **Add New Card** button to add a new card.

My Account

Add New Credit Card

Personal Information

Credit Card Information

First Name *

Credit Card Number *

`**** **** **** ****`

Last Name *

Expiration Date *

| MM | / | YY |

Address *

Card Verification Number *

`****` ?

Zip Code *

Save Credit Card

My Account
My Orders
My Downloadable Products
My Wish List

Address Book
Account Information
Stored Payment Methods
My Product Subscriptions

Newsletter Subscriptions
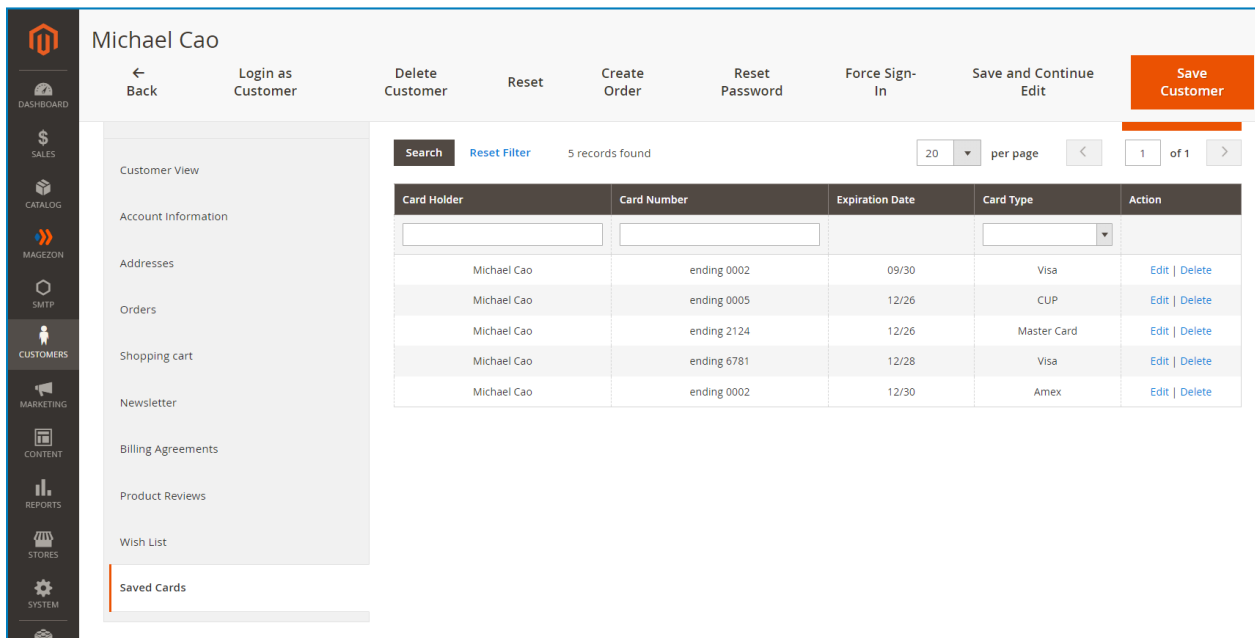My Subscriptions
My Installments

Compare Products

You have no items to compare.

Recently Ordered

3. View Saved Cards From Customer Information Page

Navigate to **Customers > All Customers** and open a Customer Information page in your Magento backend. There you can view stored cards of a customer.

In the left panel of the page, click the **Saved Cards** tab. All the saved cards are listed in a grid. You can delete or edit a saved card, or add a new card by clicking the **Add New Card** button.
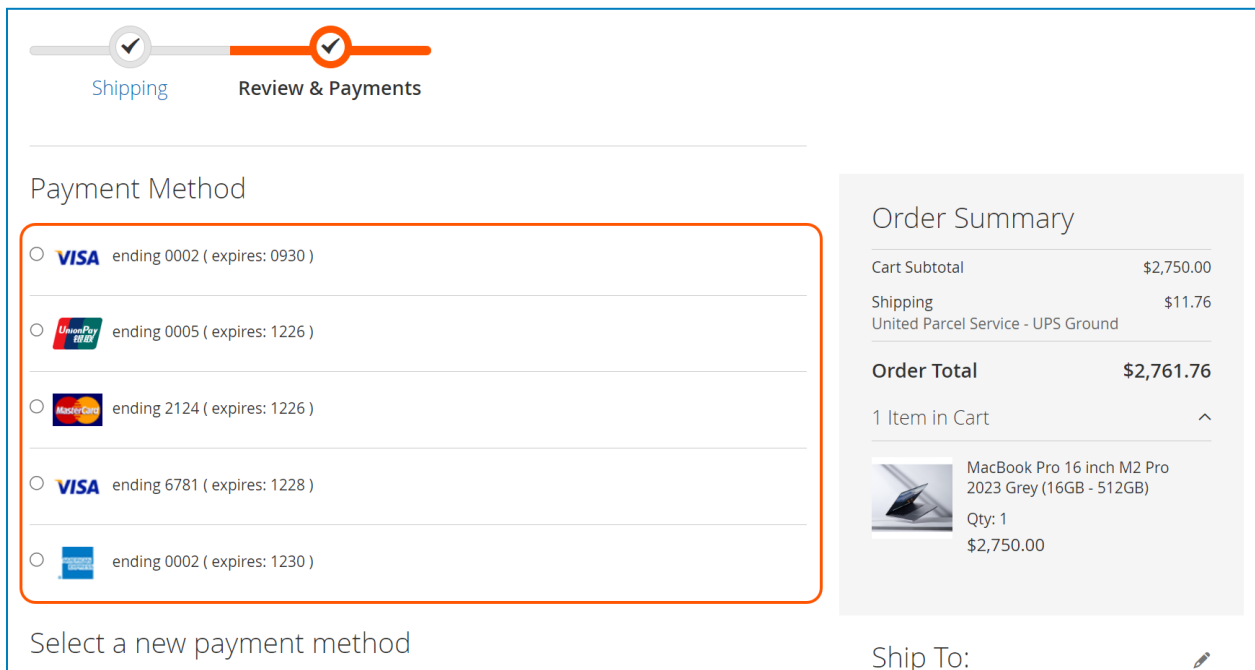
4. Pay With Stored Cards

Once the card is stored, customers can use it to initiate a payment. On the checkout page, the stored cards will be visible in the **Payment Method** section and customers can select one of them to pay for the next order.

When creating a new order from your Magento backend, you should select **Stored Cards (ConvergeGateway)** and choose one of the stored cards for payment.

Create New Order for Michael Cao in Default Stor...   Cancel   Link Cart   **Submit Order**

Payment & Shipping Information

Payment Method

○ Purchase Order
○ Bank Transfer Payment
● Stored Cards (ConvergeGateway)
   ● VISA ending 0002
   (expires: 0930)

   ○ MasterCard ending 2124
   (expires: 1226)

   ○ VISA ending 6781
   (expires: 1228)

   ○ ending 0002
   (expires: 1230)

○ Payment method (ConvergeGateway)

Shipping Method *

Get shipping methods and rates

Order Total

Order History

Order Comments

Order Totals

Subtotal $15.00

V) Payment With Subscription Products

1. Configure Subscriptions for a Product

With the recurring functionality enabled, you can configure subscriptions for a product. On the product edit page, you can see the **Subscription Options** and **Converge Subscription** tabs.

- In the **Converge Subscription** tab, set **Enable** to Yes so that the product can be purchased as a subscription. After that, customize the **Subscription Options**:

- **Billing Cycle**: this option represents the frequency of the recurring payments and can have one of the following values: Daily, Weekly, Biweekly, Semimonthly, Monthly, Bimonthly, Quarterly, Semester, Semiannually and Annually.
- **Bill on Half**: this option is available only if the Billing Cycle is Semimonthly. The values for this field are: 1st and the 15th of the month and 15th and the last day of the month.

- **End of Month**: this option is available only if the Billing Cycle is Monthly, Bi-Monthly, Quarterly, Semester or Semi-Annually, Annually. The values for this field are: Yes and No.
- **Price**: this option represents the value that will be added (if positive) or subtracted (if negative) to/from the product price. Please do not define a negative price higher than the product price.
- **Price Type**: this field has two options: "Fixed" and "Percent." The default value is "Fixed".
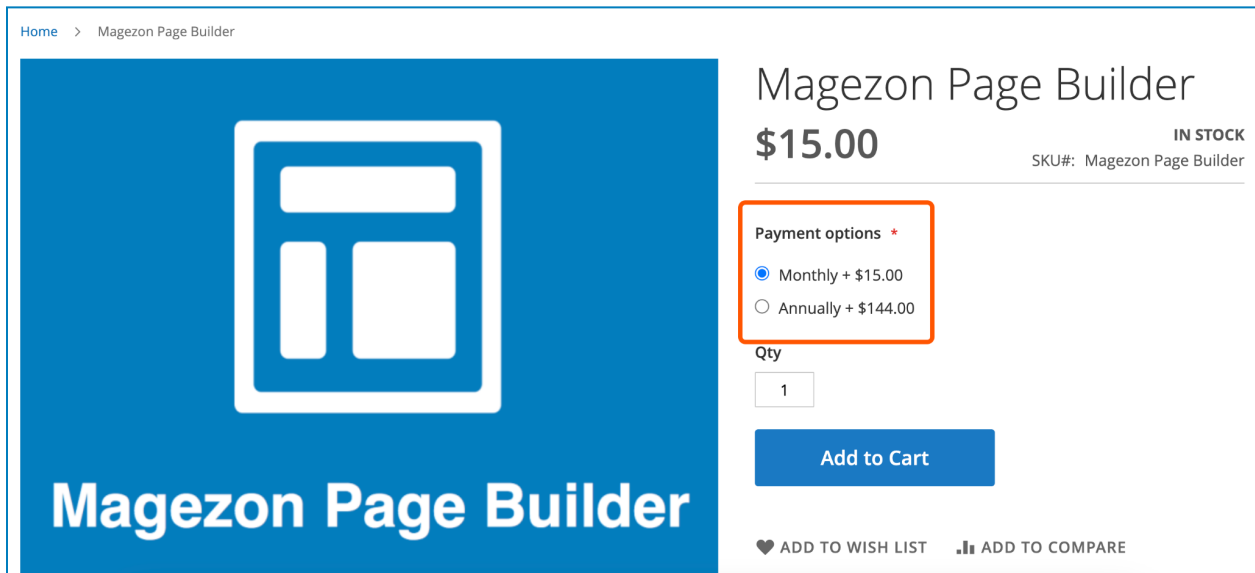

On the product page, customers can select their preferred subscription option in the **Payment options** section. After selecting an option, they will see the product price changing based on the price for the selected subscription.

- In the **Subscription Options** tab, you can enable the **Allow one-time purchase** option that lets customers make a one-time payment for the product instead of making recurring payments.

On the product page, the **One time purchase** option will be visible in the **Payment options** section.

Home > Magezon Page Builder

Magezon Page Builder

$0.00

IN STOCK
SKU#: Magezon Page Builder

Payment options *

○ One time purchase
○ Monthly + $15.00
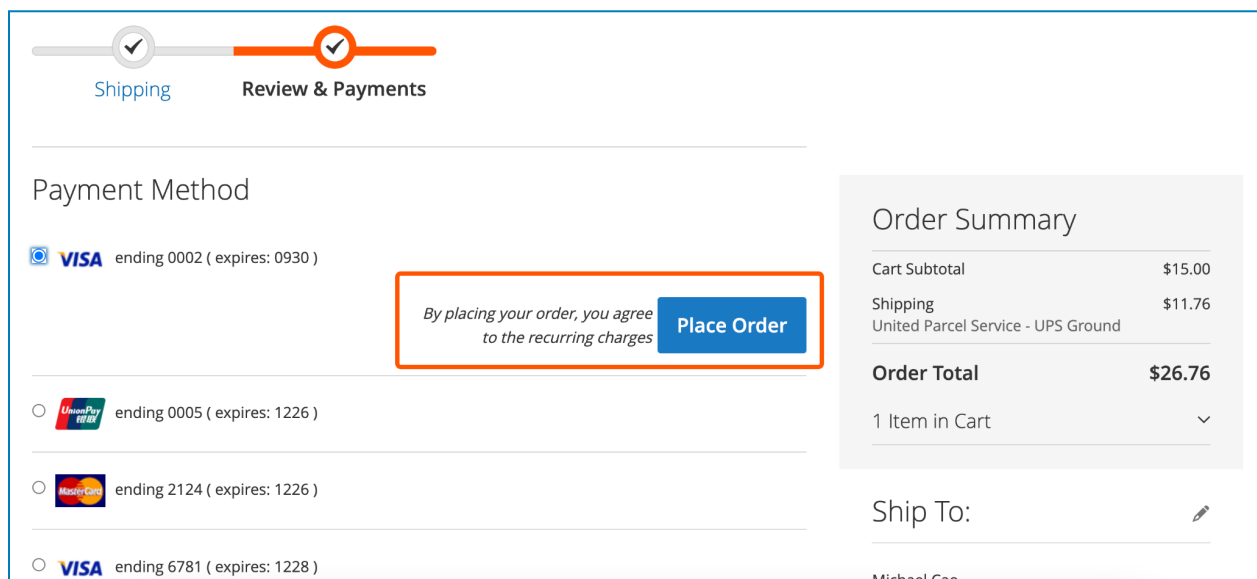○ Annually + $144.00

Qty

1

Add to Cart

♥ ADD TO WISH LIST   ▪▪ ADD TO COMPARE

2. Pay for Subscription Products

Customers will create an order with subscription products via Converge gateway as usual. When choosing to pay with an already saved card, a message is displayed next to the Place Order button (This message is defined in the **Disclosure message for subscription/installment options** field in the configuration).

If paying with a new card via Converge gateway is selected, this message is also displayed next to the Place Order button:

Select a new payment method

○ [PayPal] PayPal Express Checkout What is PayPal?

● Payment method (ConvergeGateway)

Michael Cao
556 Scranton Road
San Diego, California 92121
United States
0123456789

● Credit Card

[MasterCard] [VISA] [AMERICAN EXPRESS] [JCB] [UnionPay 银联] [DISCOVER]

Credit Card Number *

```
**** **** **** ****
```

Expiration Date *

```
MM  /  YY
```

Card Verification Number *
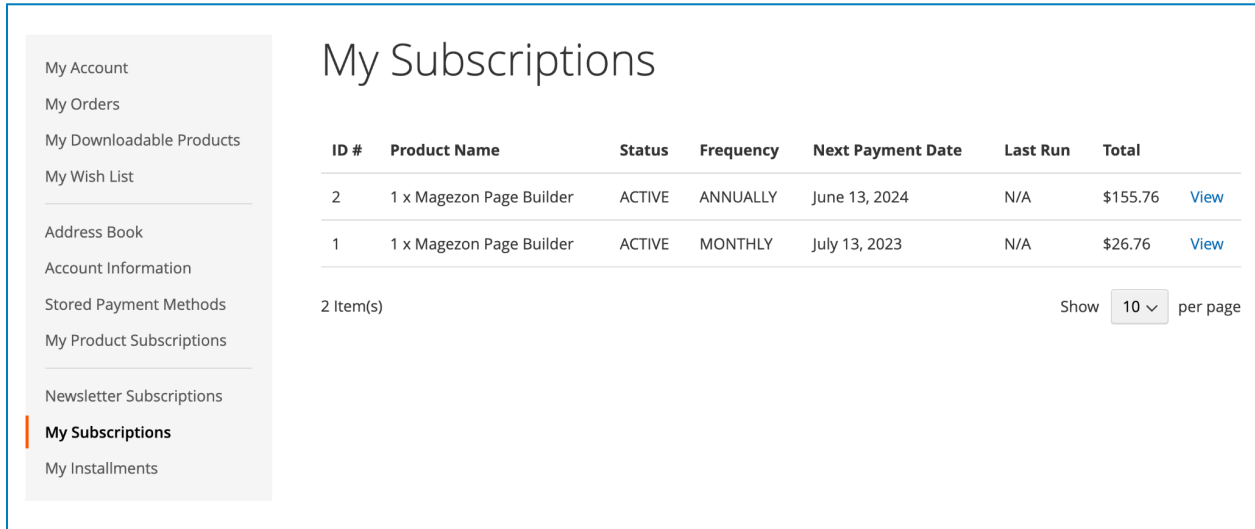
```
****
```  ?

☑ Save for later use. ?

By placing your order, you agree to recurring charges **Place Order**

556 Scranton Road
San Diego, California 92121
United States
0123456789

Shipping Method: ✎

United Parcel Service - UPS Ground

3. View Subscriptions

Customers can view their subscriptions by navigating to their account dashboard and opening the **My Subscriptions** section:

Click **View** to view the subscription details:

Subscription Details

ACTIVE

Item	Product Name	Price	Qty	Subtotal
	Magezon Page Builder	$144.00	1	$144.00

Shipping and Handling		$11.76
Discount		$0.00
Tax		$0.00
Grand Total		**$155.76**

Details

Billing Address:

Michael Cao
556 Scranton Road
San Diego, California, 92121
United States
T: 0123456789

Shipping Address:

Michael Cao
556 Scranton Road
San Diego, California, 92121
United States
T: 0123456789

Subscription

New subscription created

Frequency	MONTHLY
Start Payment Date:	July 13, 2023
Next Payment Date:	July 13, 2023
Last Run:	N/A

History

Date	Order	Description
June 13, 2023	#000000392	New subscription created

- From the backend, you can also navigate to **Sales > Subscriptions**…

…to view all subscriptions of your store:

VI) Payment With Installment Products

1. Configure Installments for a Product

With the installment functionality enabled, you can configure installments for a product. On the product edit page, you will see the **Installments Options** tab.

Set **Enable** to Yes to enable installment payments for the product. Fill the **Initial Payment Amount** that a customer should pay initially. Then customize the **Installments options**:

- **Billing Cycle**: this option represents the frequency of the installment payments and can have one of the following values: Daily, Weekly, Biweekly, Semimonthly, Monthly, Bimonthly, Quarterly, Semester, Semiannually and Annually.

- **Bill on Half**: this option is available only if the Billing Cycle is Semimonthly. The values for this field are: 1st and the 15th of the month and 15th and the last day of the month.

- **End of Month**: this option is available only if the Billing Cycle is Monthly, Bi-Monthly, Quarterly, Semester or Semi-Annually, Annually. The values for this field are: Yes and No.

- **Number of Payments**: this option defines the number of installments a customer should pay.
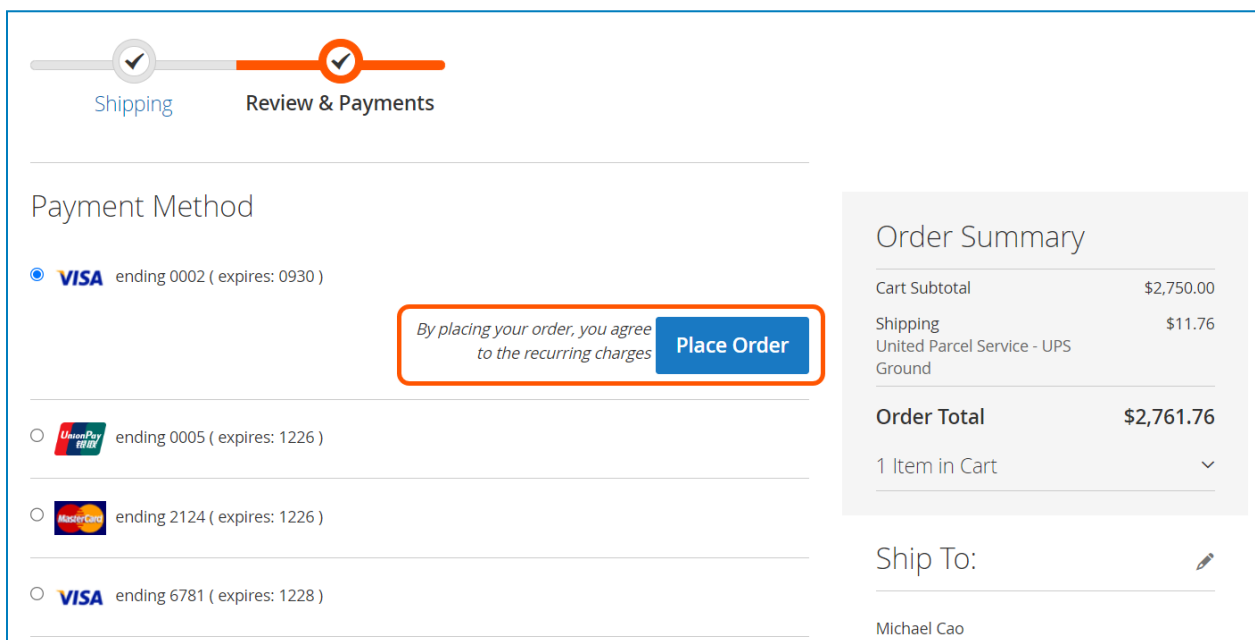
On the product page, customers can select an installments option for the product.

With installment products, customers will place an order as usual.

2. Pay for Installment Products

Customers will create an order with installment products via Converge gateway as usual. When choosing to pay with an already saved card, a message is displayed next to the Place Order button (This message is defined in the **Disclosure message for subscription/installment options** field in the configuration).

If paying with a new card is selected, this message is also displayed next to the Place Order button:

Select a new payment method

○ **PayPal** PayPal Express Checkout What is PayPal?

● Payment method (ConvergeGateway)

> Michael Cao
> 556 Scranton Road
> San Diego, California 92121
> United States
> 0123456789

⊙ Credit Card

Credit Card Number *

```
**** **** **** ****
```

Expiration Date *

```
MM  /  YY
```

Card Verification Number *

```
****  ⑦
```

☑ Save for later use. ⑦

556 Scranton Road
San Diego, California 92121
United States
0123456789

Shipping Method: ✎

United Parcel Service - UPS Ground

By placing your order, you agree to the recurring charges **Place Order**

3. View Installments

Customers can view their installments by navigating to their account dashboard and opening the **My Installments** section:

Click **View** to view installment details including Amount, Due Date, Paid Date, Order, and Status:

On the order view page in the backend, you can open the **Installments** tab to view installments of the order.

| #000000543 | | | ← Back | Login as Customer | Send Email | Credit Memo | Reorder |

ORDER VIEW

- Information
- Invoices
- Credit Memos
- Shipments
- Comments History
- Transactions
- **Installments**

1 records found | | | | | 20 ▾ | per page | ‹ | 1 | of 1 | › | | Filters

ID ↑	Customer Name	Product Name	Paid Amount	Due Amount	Paid Installments	Due Installments	Last Payment Date	Status	Action
69	Michael Cao	1 x MacBook Pro 16 inch M2 Pro 2023 Grey (16GB - 512GB)	$100.00	$2,661.76	0	4	Jul 16, 2023 11:39:19 PM	Pending	Edit

Click **Edit** in the **Action** column and you can edit the payment information by clicking the Modify Payment Information button.

Installment Details | **Modify Payment Information**

72	Michael Cao	0.0000	2024-04-17	N/A	Pending
71	Michael Cao	0.0000	2024-01-17	N/A	Pending
70	Michael Cao	0.0000	2023-10-17	N/A	Pending
69	Michael Cao	100.0000	N/A	2023-07-16 23:39:19	Paid

Payment Information

Card Details

| Card Number: | 40**********6781 |
| Expiration Date: | 12/28 |

Billing Address

First Name:	Michael
Last Name:	Cao
Street:	556 Scranton Road
City:	San Diego
Zip Code:	92121
Country:	United States

- You can also navigate to **Sales > Installments**…

…to view all installments of your store and **Edit** them:

ID ↑	Customer Name	Product Name	Paid Amount	Due Amount	Paid Installments	Due Installments	Last Payment Date	Status	Action
1	Michael Cao	1 x MacBook Pro 16 inch M2 Pro 2023 Grey (16GB - 512GB)	$100.00	$2,661.76	0	4	Jul 16, 2023 11:39:19 PM	Pending	Edit
2	Michael Cao	1 x MacBook Pro 16 inch M2 Pro 2023 Grey (16GB - 512GB)	$100.00	$2,661.76	0	6	Jul 16, 2023 11:38:02 PM	Pending	Edit

VII) Support

If you have any questions or need any support, feel free to contact us via the following ways. We will get back to you within 24 hours after you submit your support request.

- Submit contact form.
- Email us at support@magezon.com.
- Submit a ticket.
- Contact us through Skype: support@magezon.com.
- Contact us via live chat on our website.