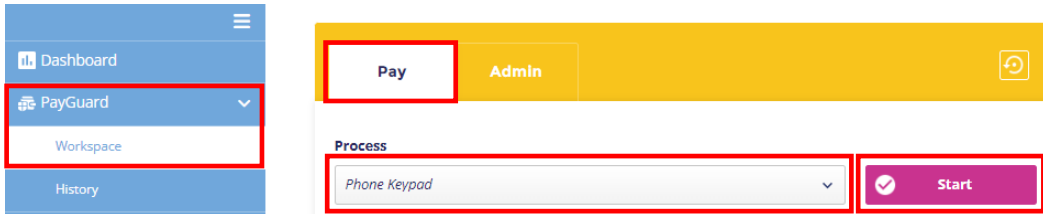


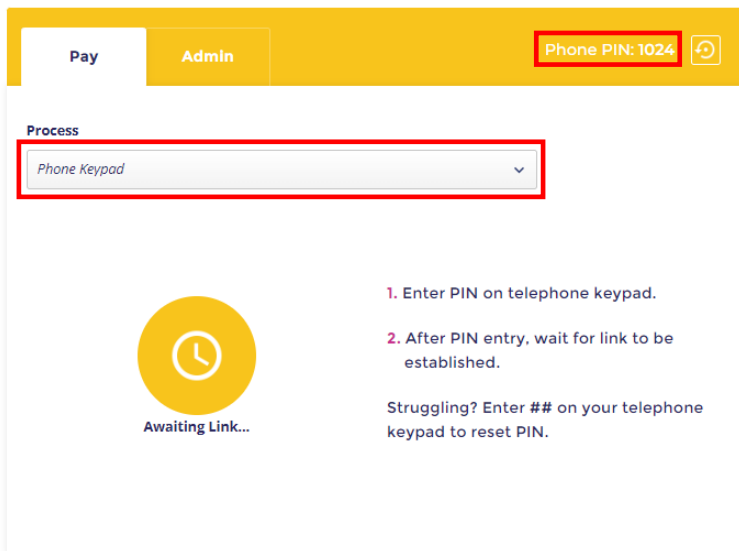
PayGuard Transaction Process

Taking a Payment Over the Phone

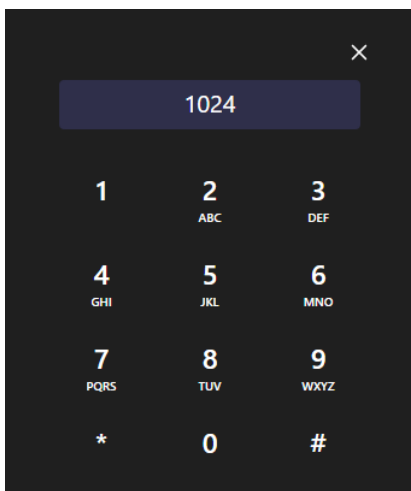
- An inbound call is made.
- Verify with the caller whether they are looking to make a payment.
- PayGuard > Workspace > Pay > from the 'Process' dropdown select 'Phone Keypad' > 'Start'



- From the 'Process' dropdown select 'Phone Keypad'.



- Enter your PIN in to your phone/Teams/Zoom keypad.



- **Amount** – Value of the Transaction

- **Date** – Today’s Date
- **Reference** – See Departmental Process Documentation
- **Method** – Select Payment Gateway
- **Name** – Payers Name

Pay
Admin
↻

Process

Phone Keypad ✔ Linked

Amount	Date	Reference
£100.00	25/10/2023	Test Reference

+ Add Payment

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

Method

Training Gateway

Name

Mark Testing

Card

Card Number (PAN) 0 digits Expiry Date Security Code

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

- Request that the payer enters their credit/debit card number on their phone keypad followed by the # key.
 - If a mistake is made then they can press ** to clear the field and start again.
- Request that the payer enters their credit/debit card expiry date on their phone keypad followed by the # key.
 - If a mistake is made then they can press ** to clear the field and start again.
- Request that the payer enters their credit/debit card security code on their phone keypad followed by the # key.
 - If a mistake is made then they can press ** to clear the field and start again.
- ‘Confirm’

Pay
Admin
↻

Process

Phone Keypad ✔ Linked

Amount	Date	Reference
£100.00	25/10/2023	Test Reference

+ Add Payment

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

Method

Training Gateway

Name

Mark Testing

Card

4242 - XXXX - XXXX - 4242 16 digits 10/25 XXX

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

✔ Confirm

- Verify that all of the details submitted are correct.
- 'Submit'

Confirm Payment
↻

Amount	Date	Reference
£100.00	Now	Test Reference

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

Method

Training Gateway

Name


Mark Testing

Card Number	Expiry Date	Security Code
4242 - 42XX - XXXX - 4242	10/25	XXX

✔ Submit
✎ Edit Payment

- **Post-Order Reference** – See Departmental Process Documentation
 - 'OK' to apply.
- **Send Confirmation** – Email Address/Mobile Number
 - 'Send' to send confirmation.
- **Notes** – See Departmental Process Documentation
 - 'Append' to apply.
- **Tags** – See Departmental Process Documentation
 - 'Apply Tag' after each tag to apply the tags individually.

Successful


£100.00
Received Successfully

£100.00
Token: pl_5054eV/CvubVLFMfn10I04sC

Post-Order Reference
Test PO Reference

Send Confirmation
mark.jeffery@it.ox.ac.uk

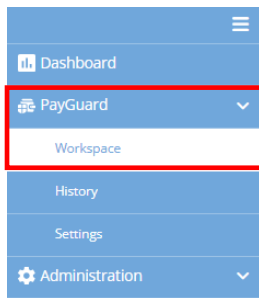
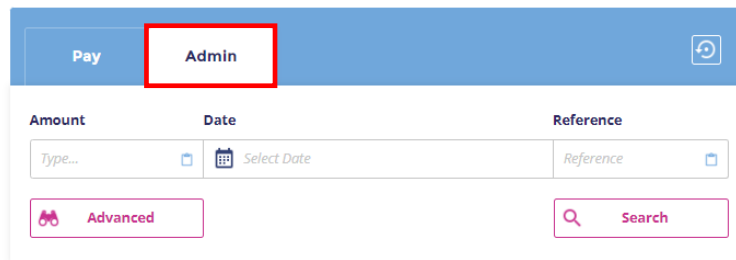
Notes
Test note

Tags
tag1 x tag2 x tag3 x

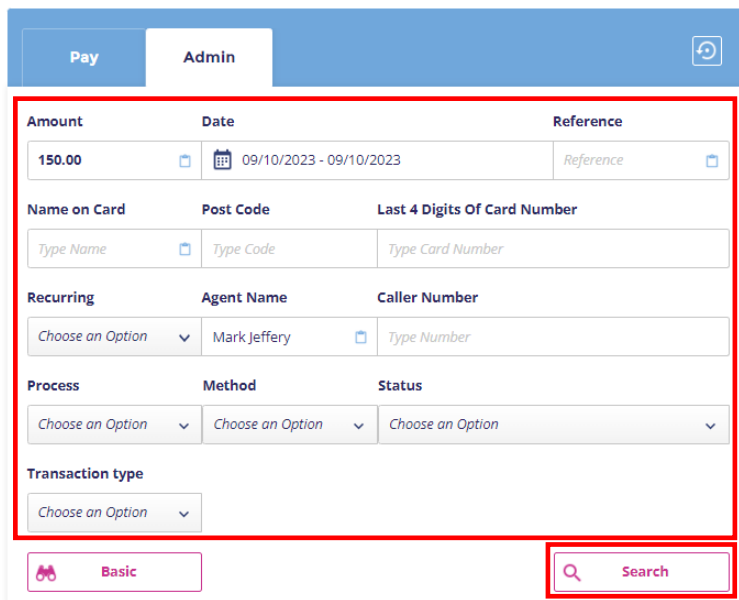
- To take another payment from the payer select 'Back to Start'. To end the transaction, end the call.

Refunding a Payment

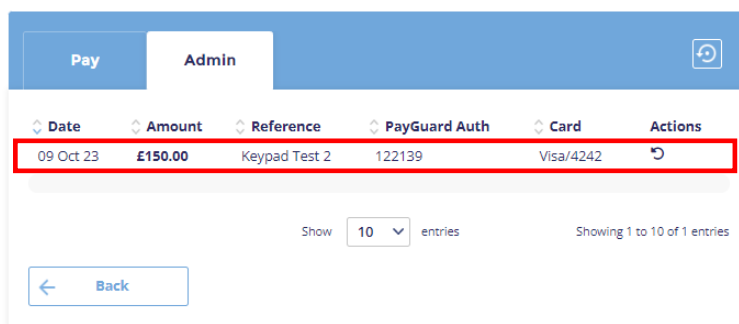
- A request is made for a refund/partial refund.
- PayGuard > Workspace > Admin

- Enter values in to the Amount/Date/Reference field(s) to find the transaction > 'Search'
- To expand the searchable fields, select 'Advanced'.



- Click on the transaction.



Date	Amount	Reference	PayGuard Auth	Card	Actions
09 Oct 23	£150.00	Keypad Test 2	122139	Visa/4242	

Show entries Showing 1 to 10 of 1 entries

[← Back](#)

- 'Refund'

Pay
Admin
↻

Date	Amount	Reference	PayGuard Auth	Card	Actions
09 Oct 23	£150.00	Keypad Test 2	122139	Visa/4242	↻

Show 10 entries Showing 1 to 10 of 1 entries

Payment Details

Date	Caller Number	Service Number
09 Oct 2023	07765771193	01865957513
Agent Name	Reference	Status
Mark Jeffery	Keypad Test 2	success
Name on Card	Card Number	Amount
Peter Testing	Visa/4242	£150.00
Refunded	Refunded Scheduled	Token
£0.00	£0.00	pi_3Nzj45CvubVLFMfn0DK77f28

← Back
↻ Refund

- Enter the 'Amount' or 'Percentage' that you want to refund.
- 'Confirm'

Pay
Admin
↻

Payment Details

Date	Caller Number	Service Number
09 Oct 2023	07765771193	01865957513
Agent Name	Reference	Status
Mark Jeffery	Keypad Test 2	success
Name on Card	Card Number	Amount
Peter Testing	Visa/4242	£150.00
Refunded	Refunded Scheduled	Token
£0.00	£0.00	pi_3Nzj45CvubVLFMfn0DK77f28

Amount	Percentage	Reference
£50.00	33.3	Reference

Method

Training Gateway


Name

Peter Testing

Card Number	Expiry Date	Security Code
4242 - 42XX - XXXX - 4242	05/25	XXX

← Back
✔ Confirm

- Verify that all of the details are correct.
- 'Submit'

Confirm Refund


Amount	Percentage	Date	Reference
£50.00	33.3%	Now	


Method


Training Gateway

Name


Peter Testing


Card Number	Expiry Date	Security Code
4242-XXXX-XXXX-4242	05/25	XXX


Submit


Edit Refund

- **Post-Order Reference** – See Departmental Process Documentation
 - ‘OK’ to apply.
- **Send Confirmation** – Email Address/Mobile Number
 - ‘Send’ to send confirmation.
- **Notes** – See Departmental Process Documentation
 - ‘Append’ to apply.
- **Tags** – See Departmental Process Documentation
 - ‘Apply Tag’ after each tag to apply the tags individually.


Successful




Your refund of
£50.00
has been completed successfully


Post-Order Reference

Test Refund


OK


Send Confirmation

mark.jeffery@it.ox.ac.uk


Send

Notes


Test Note


Append

Tags

tag1

tag2


Apply Tag

Back to Start

- ‘Back to Start’