



icePay
User Manual
Version 4.3

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Welcome to icePay

As email and web-based communications become more common in today's business world, many call centers are evolving into **contact centers**. Contact centers interact with clients over the telephone, through email messages, and over the Internet.

ice is a powerful contact center solution that allows for the integrated handling of **contacts** (calls, email messages, chat requests, etc.) that are directed to your contact center.

icePay is a tool that allows you to handle purchase transactions in a PCI compliant method, manage payment authorizers, and view transaction history.

This manual is designed for administrators who contribute to the configuration and management of icePay in your contact center. An administrator is responsible for defining authorized users, and setting global parameters that impose corporate policy on transaction details and view permissions. An administrator is also able to create and modify the mandatory and optional fields required for transaction details. This application allows users to process payments, tokenize payment information and view the results of these transactions.

This manual will cover several topics:

- **Chapter 1: Getting Started** provides important information regarding icePay, common error and warning messages, and general settings.
- **Chapter 2: Purchase** describes the purchase page, including the input fields and buttons that agents use to identify transaction parameters in icePay.
- **Chapter 3: Transactions** describes how to manage and view transaction details in the transactions grid. This includes configuring the grid, viewing the details grid for individual transactions, and exporting the transaction details.
- **Chapter 4: Stores** describes how to manage and add the payment authorizers used to handle customer transactions

- **Chapter 5: Supported Deployment Scenarios** describes the various deployment options supported by icePay. This section details the step by step process of handling a transaction from an agent's perspective in each of the supported scenarios.
- The Appendix provides additional information on the status codes returned by ice in the transaction results.
 - Appendix A: Status Codes
 - Appendix B: Activity Codes
 - Appendix C: Agent States
 - Appendix D: Payment Provider Field Options

In discussing how this application works, this manual assumes that you have the following:

- A basic understanding of fundamental contact center terms such as inbound, outbound, user, IVR, and contact.
- Basic navigating skills for standard web-based Windows graphical user interfaces (GUIs). This includes the ability to right-click and left-click, select options from a right-click menu, re-size and minimize windows, and navigate and scroll with a mouse pointer.

The following conventions are used in this manual:

- **Notes** highlight important information.
- **Cautions** are used to bring attention to functions and features that can impact the information viewed.
- Words displayed in **bold** font are defined within the paragraph.
- *Italics* are used to indicate buttons found on the software interface.

Where you can activate a feature in more than one way (button, menu, icon, and so forth), the manual describes only one method.

This version of the manual is specific to icePay Release 4.3 and requires ice server version 14.



Chapter 1: Getting Started

The icePay application allows contact centers to collect credit card payments from customers in a PCI compliant method. Users can handle customer transactions and view the transaction results with this tool.

When an agent starts the transaction, a conference consisting of the customer, the agent, and icePay is established. Through the call flow icePay prompts the customer to enter their credit card information. This information is hidden from the agent as the dialtones are hidden. However, agents will be able to hear any questions asked by the customer while in the conference call, and can continue to support them through the process. When the payment is processed or tokenized, the results are returned for the agent to review.

To fully utilize icePay and the various configurations available, you must have the following:

- icePay configured in workflow
- An ice account
- ice server version 14

Note: If you do not have an ice account created, contact your ice administrator.

This chapter includes information about login procedures and general icePay settings to be managed by administrators.

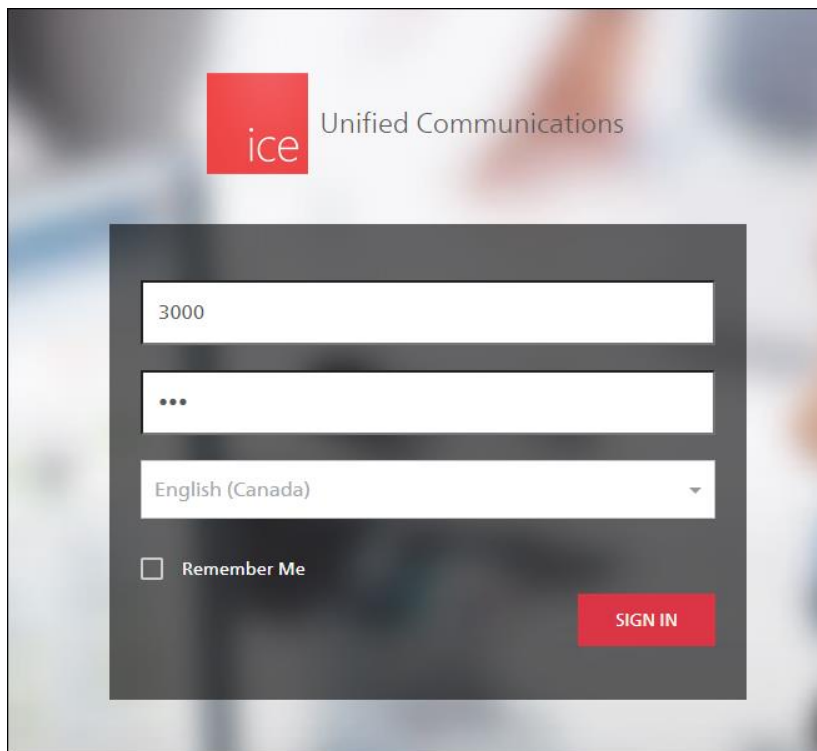
Once familiar with the icePay interface, you may proceed to subsequent chapters for detailed information on how to take a payment, configure a store, and view transaction details.

To access icePay, you must first log onto iceManager.

iceManager is a web-based application and can be used on any computer that is running a web browser. To sign in, you must provide a user ID and password. Contact your ice administrator if you do not have this information.

To sign into iceManager:

1. Open your web browser and go to your iceManager site.

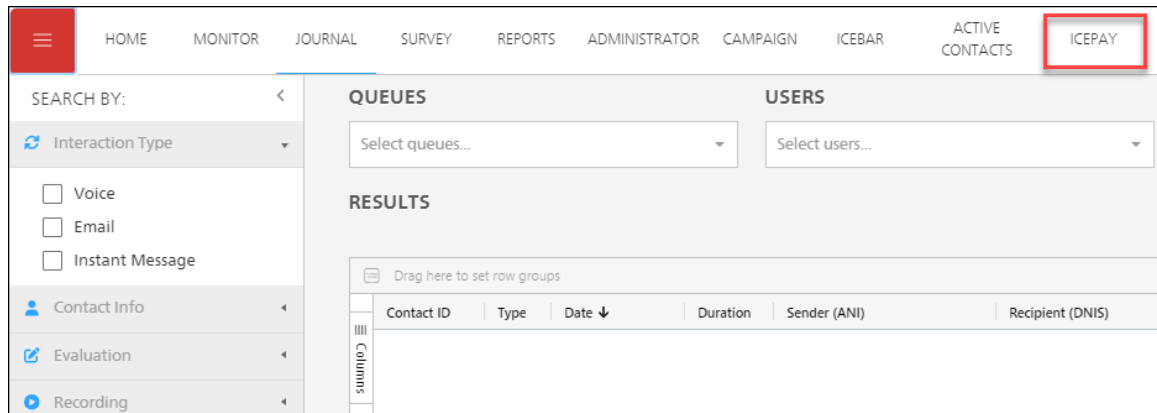


2. In the 'Username' field, enter your four-digit user ID.
3. In the 'Password' field, enter your password.
4. If you wish to view iceManager in a language other than English, click the dropdown and select the language of choice. The icePay GUI will be displayed in the selected iceManager language.
5. Select the 'Remember Me' check box if you want your Username to be pre-populated the next time you go to the Sign In page

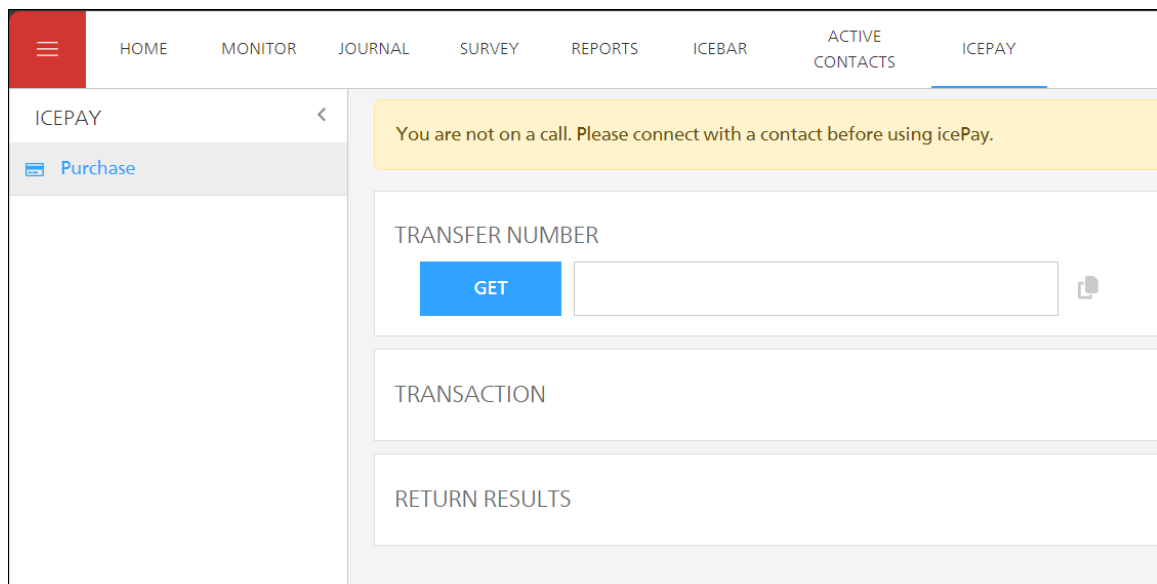
Note: this option is not recommended for shared computers.

6. Click Sign In.
7. Once you have signed in, you will see the journal page.

Below is a screenshot of a sample journal screen.



8. Click on the *icePay* button in the Navigation Panel.



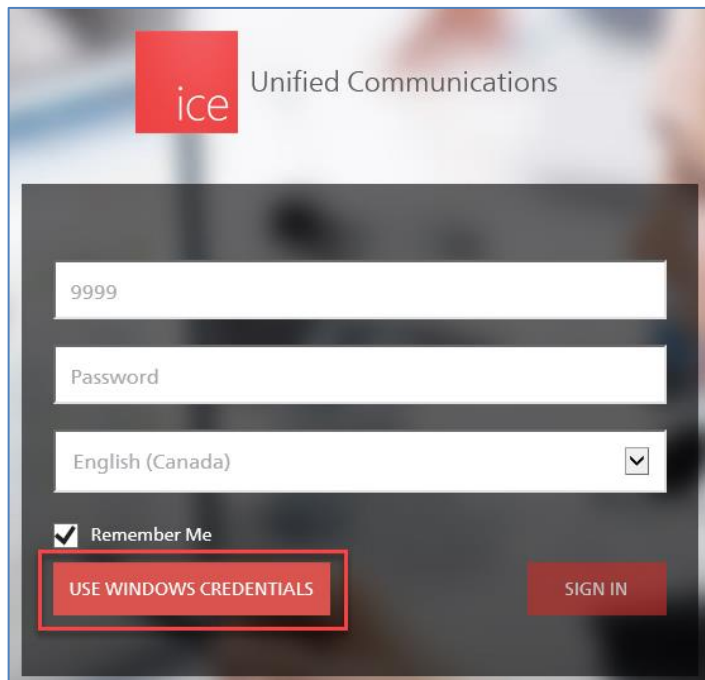
Single Sign-On

If your organization has enabled Single Sign-On for iceManager, you will be able to sign on using your Windows credentials.

Note: To enable Single Sign-On, it will need to be configured using Active Directory in iceAdministrator. For further information on how to enable Single Sign-On, please review the *iceAdministrator User Manual*.

Signing On with Single Sign-On

Once Single Sign-On is properly configured, launch the iceManager website, and click Use Windows Credentials button rather than entering the username and password.

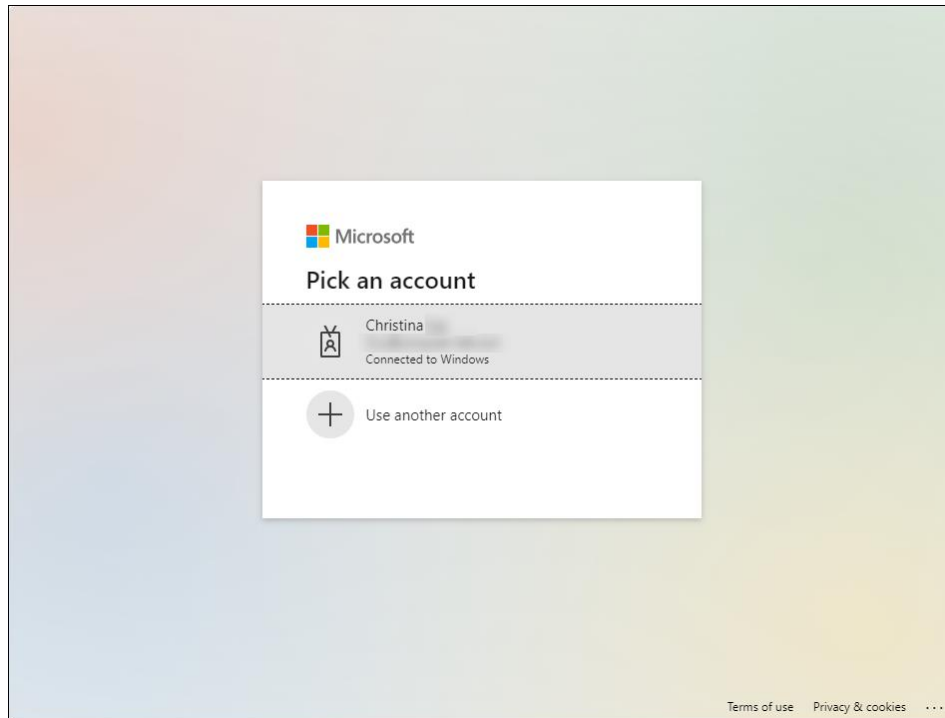
The image shows a login interface for 'ice Unified Communications'. At the top left is the 'ice' logo. Below it are three input fields: the first contains '9999', the second is labeled 'Password', and the third is a dropdown menu showing 'English (Canada)'. Below these fields is a checkbox labeled 'Remember Me' which is checked. At the bottom of the form are two buttons: 'USE WINDOWS CREDENTIALS' (highlighted with a red rectangle) and 'SIGN IN'.

1. When you click OK, the Single Sign-On dialog box will appear.

Note: If you wish to skip this step for future logins, check the box for *Remember Me*. This way, you will not have to enter your user ID each time you sign in.

2. To sign in with this method, you will use the same credentials that you use to log on to your computer or your company email. Enter your username and password in the boxes.

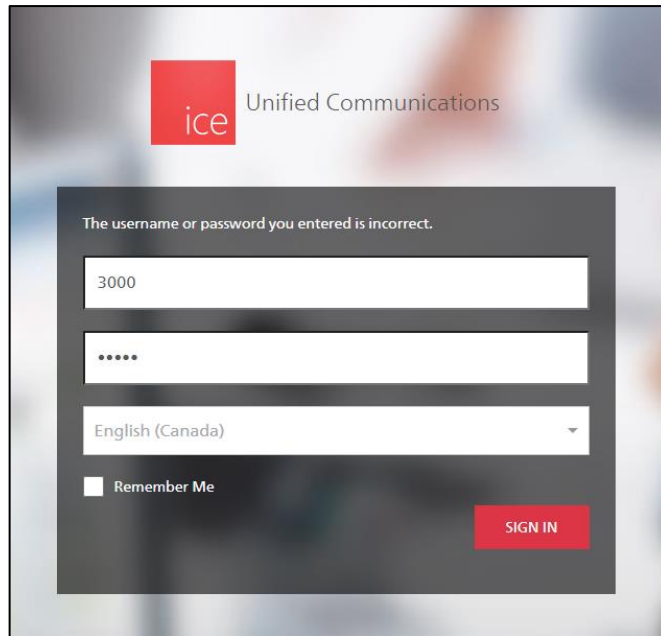
Note: This dialog box may look different, depending on the way your administrator has configured the system.



Common Error and Warning Messages

Authentication error

If a user types the wrong User ID or the wrong password, the following message appears.

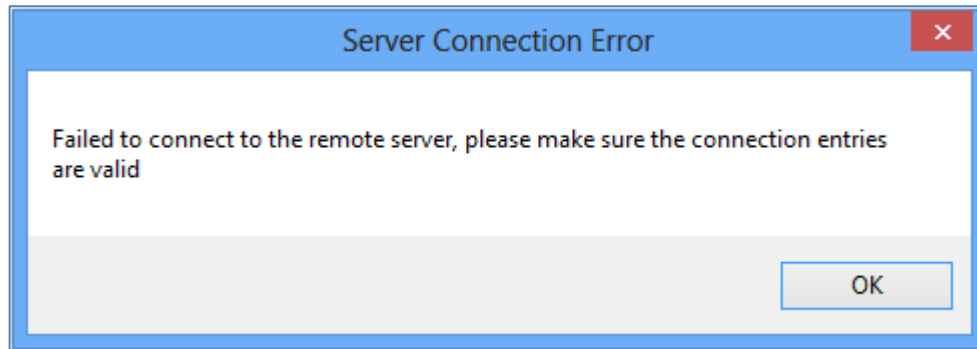


The screenshot shows the login interface for 'ice Unified Communications'. At the top left is the 'ice' logo (a red square with the word 'ice' in white) followed by the text 'Unified Communications'. Below this is a dark grey rectangular box containing the login form. Inside the box, the message 'The username or password you entered is incorrect.' is displayed in white text. Below the message are three input fields: the first contains the text '3000', the second contains six dots representing a password, and the third is a dropdown menu currently showing 'English (Canada)'. At the bottom left of the box is a checkbox labeled 'Remember Me'. At the bottom right is a red button with the white text 'SIGN IN'.

If you cannot remember your password or User ID, an ice administrator can reset it in iceAdministrator. For more information refer to the *iceAdministrator User Manual*.

Server Connection Error

iceManager must have network connectivity to the ice server through the IMRService to function properly. If your contact center experiences network problems, you may see this error message.

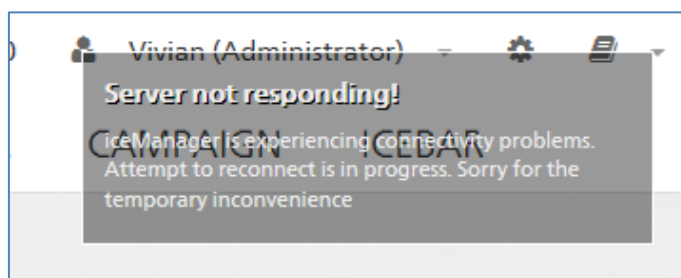


This error message indicates that the server needs to be restarted. Please contact your ice administrator.

Loss of connection

A few seconds after connection is lost, an error message appears in the top right corner of the screen:

"Server not responding! iceManager is experiencing connectivity problems. Attempt to reconnect is in progress. Sorry for the temporary inconvenience".



The message fades away after a few minutes. iceManager will keep attempting to reconnect until it is successful.

Verify that you are connected to the Internet. If you are connected, but still receive the Server not responding message, contact your ice administrator.

Not Assigned to Store

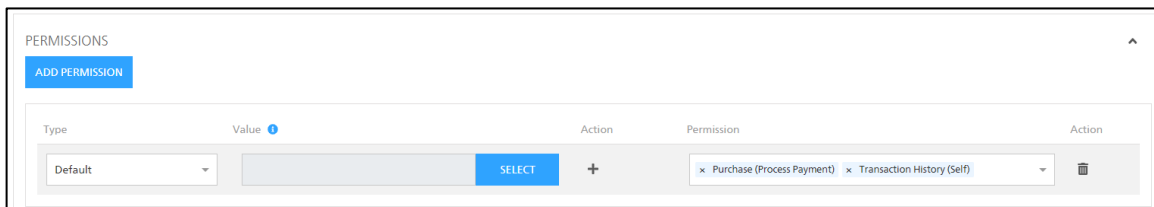
If you are not assigned to any stores in icePay, you will see the following message after logging into iceManager and clicking on the icePay tab:

You are not assigned to a Store. Please contact System Administrator.

User Roles in the icePay Tool

Your ability to handle purchases and view transaction history is determined by your Store settings. For each Store, user access to the purchase options (process payment/ tokenize) and transaction history (self, all) can be configured.

The following screenshot shows the Store Permissions sections of the Stores properties page:

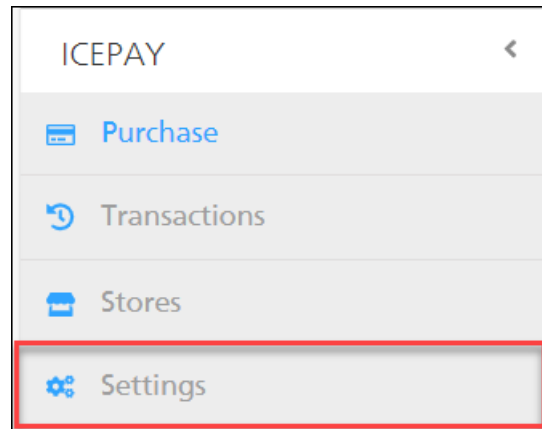


For more information on how to manage user permissions, refer to Chapter 4: Stores.

Managing Settings

Only users configured as administrators can access the icePay Settings page.

To access this page, select icePay Settings from the icePay menu:



Custom Fields

icePay supports the configuration of up to 10 custom fields. This section allows administrators to view and configure the custom fields for the Purchase page.



To Edit a Custom Field:

1. Click the pencil icon in the row of the custom field you would like to edit.
2. Modify the name of the English or French labels that will appear on the Purchase and Transaction pages. If these fields are empty, the custom field will display the text in the Name field.

Note: The language labels displayed are based on the configured languages in iceManager settings. For more information, please refer to the *iceManager User Manual*. icePay will display the Custom Field label on the Purchase page in the language selected by the user upon initial login.

3. Enable the *Send to Payment Provider* toggle to send the value in this field to the payment provider. For each configured payment provider, select from the unique list of supported request fields to map the custom field to the payment provider API. For more information, refer to Appendix D.
4. If the custom field is to be computed, enable the *Computed* toggle.
5. In the *Computed Format* field, specify how the field will be computed. The computed format for custom fields replaces {<field>} values with one of the transaction fields:

Transaction Field	Type
DateTime	DateTime
OrderNumber	String
StoreID	Integer
Amount	Decimal
OriginalContactId	Integer
AgentId	Integer
Language	String
CustomerName	String
CustomerEmail	String

They can be formatted as numeric or date and time, or parsed from string. If the value of the field needs to be formatted, specify it in <format> resulting in {<field>:<format>}.

If the field is of type string, include the type to cast it to, where <type> is Int32, Int64, Single, Decimal, or DateTime resulting in {<field>:<format>:<type>}.

For example, the format string "{DateTime:yyMMdd} {OrderNumber:D14:Int32}" will format:

- "2024-10-21 17:09:58.527" into "241021"
- "1756410002" into "00001756410002"

In this next example, the format string {CustomerName} copies the value of the *Customer Name* transaction field into the custom field *Billing Name*.

Computed	ON 
Computed Format 	{CustomerName}
Formats for numeric and date & time .	

Note: Computed custom fields will be displayed as disabled input fields on the purchase page and cannot be edited by the user before starting the transaction.

Currently on call. Fill out form and click Start to begin Card Collection.

TRANSACTION		
Order Number (Optional) 133	Customer Language English	Customer Name (Optional) John P
Store Name Bambora	Transaction Amount 13.50	Postal Code (Optional) L3T 7Z3
Billing Name		
Actions CLEAR START CANCEL		

The following image shows the computed field *Billing Name*, as the card information is collected. It copies the content from the *Customer Name* field to the *Billing Name* field as specified.

Initiating icePay Card Collection.

TRANSACTION		
Order Number (Optional) 133	Customer Language English	Customer Name (Optional) John P
Store Name Bambora	Transaction Amount 13.5	Postal Code (Optional) L3T 7Z3
Billing Name John P		
Actions CLEAR START CANCEL		

RETURN RESULTS		
icePay Transaction ID 1065	Status Code Created (1)	Masked PAN
Expiry Date	Card Type	Token
Authorization Code	Store Result Code	Store Result Description
Store Transaction ID		

6. Enable the *Required* toggle to make this custom field mandatory.
7. To make this field a down-down menu, enter the options in the Values field. If empty, the field will default to text input.
8. Enter the default selected value for the drop-down menu.

[6] Billing_Name

Name

Billing_Name

Label

English (Canada)

Billing Name

Français (Canada)

Nombre de facturation

Send to Payment Provider

ON 

Payment Provider Field

TD Bambora

PaymentRequest.Billing.Name  

Moneris

ResPurchaseCC.CustInfo.Billing.first_name  

Exact Payments



Computed

ON 

Computed Format 

{CustomerName}

Formats for [numeric](#) and [date & time](#).

Disable a Custom Field:

Click the toggle () on the Custom Field to disable the field. A disabled field can be enabled at a later time.

Note:

- Custom fields should be discussed and agreed upon as part of the joint application design with ComputerTalk.

- The ability to create and delete custom fields is restricted to global administrators. Please reach out to ComputerTalk for more information.

API Keys

This section allows administrators to create API Keys which are used to authenticate with the icePay web service. They are created by users with administrator permissions and have access to all API methods.

Note: The Global Admin setting “API Keys Enabled” must be enabled.

Custom Fields

API Keys

Global Admin Settings

API KEYS 

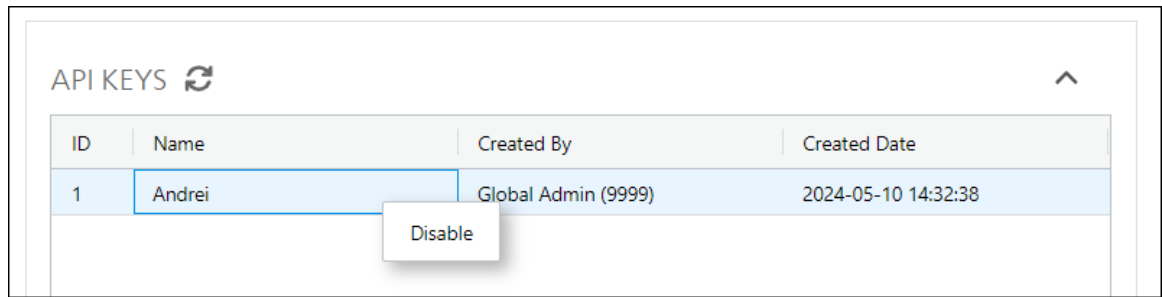
ID	Name	Created By	Created Date	Enabled
1	Andrei	Global Admin (9999)	2024-05-10 14:32:38	✓
2	Christina	Global Admin (9999)	2024-06-05 18:27:56	✓
3	QA test	Global Admin (9999)	2024-06-11 19:18:02	×
4	June	Global Admin (9999)	2024-06-12 15:59:37	✓

CREATE API KEY 

TEST API KEY

Disable and Enable the API Key

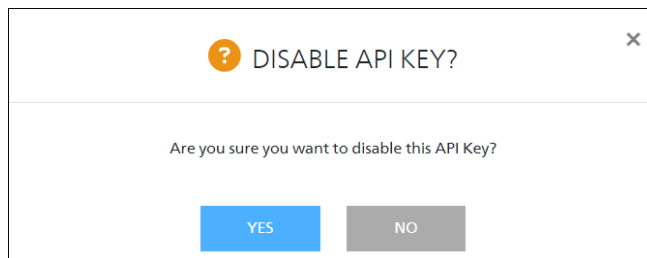
To disable the API Key, right-click on the key in the grid and select “Disable”.



ID	Name	Created By	Created Date
1	Andrei	Global Admin (9999)	2024-05-10 14:32:38

Disable

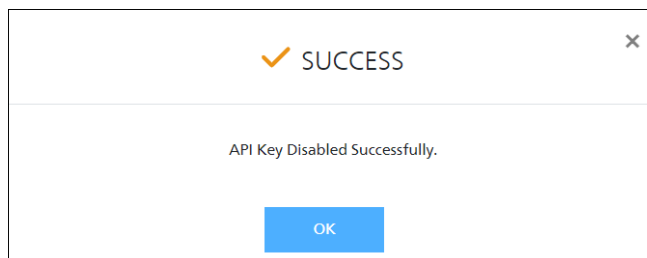
Select "Yes" in the following window to disable the API Key.



 **DISABLE API KEY?** 

Are you sure you want to disable this API Key?

The following window will display upon successfully disabling the key.



 **SUCCESS** 

API Key Disabled Successfully.

To enable, right click on the key and select *Enable*.

Create API Key

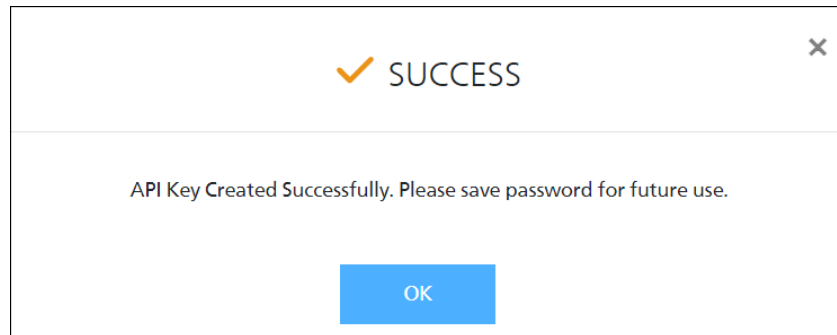
Administrators can create API Keys.



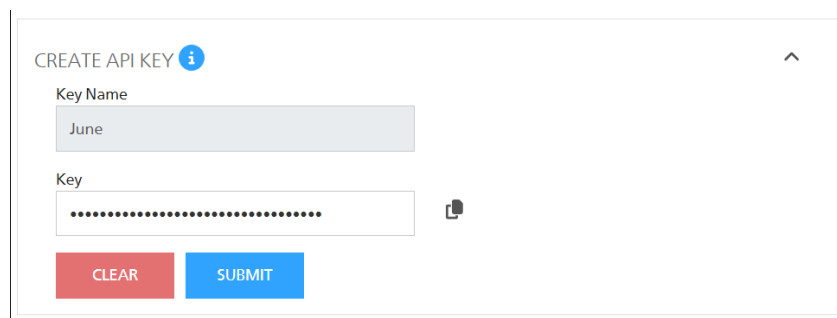
CREATE API KEY 

Key Name

To create a key, enter a name for the key in the Key Name field and click the *Submit* button. On successfully creation, the following window will display.



A key will be created, and can be copied using the copy icon next to the key field.

A form titled "CREATE API KEY" with a blue information icon. It contains two input fields: "Key Name" with the value "June" and "Key" with a masked value of dots. To the right of the "Key" field is a copy icon. At the bottom, there are two buttons: a red "CLEAR" button and a blue "SUBMIT" button.

Note: The Key is only available once on submit. As it cannot be displayed again, it is important to save the Key securely if it will be required at a later time.

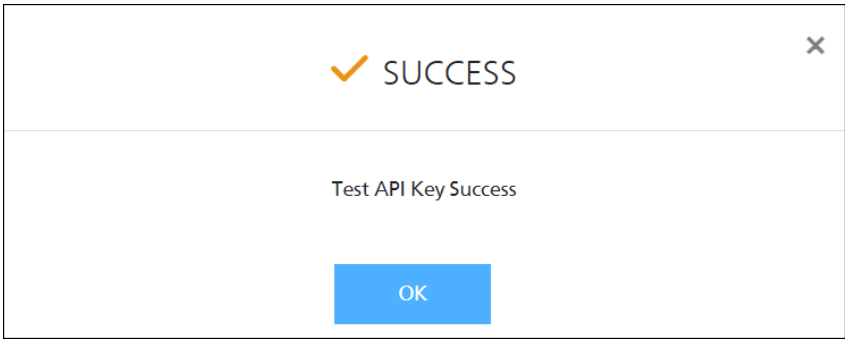
Test API Key

Users can use the Key field to check if the API Key is valid.

A form titled "TEST API KEY" with a blue information icon. It contains a single input field labeled "Key". Below the input field is a blue button with the text "TEST" in white.

To test, enter the Key in the field and click the *Test* button.

If the key is valid, you will see the following message.



Global Admin Settings

This section contains settings and configurations accessible only to the ice global administrator.

SETTINGS

Custom Fields

API Keys

Global Admin Settings

Allowed Customer Languages

x English

x French

Allowed Payment Providers

x TD Bambora

x Moneris

x Exact Payments

x TrustCommerce

Consult UC Addresses

x sip:140

x sip:140

Local Time Zone

(UTC-05:00) America/Toronto - Eastern Standard Time

API Keys Enabled

ON

☒

Purchase Enabled

ON

☒

Transaction Status Timeout

5000

DNIS Wagon Wheel Enabled

OFF

☐

Custom Fields Enabled

ON

☒

Maximum Number of Custom Fields

10

Purchase Paste Enabled	OFF	☐
Purchase Paste RegEx Enabled	OFF	☐
Purchase Copy Enabled	OFF	☐
Purchase Copy RegEx Enabled	OFF	☐
Refund Enabled	OFF	☐
Transactions Page Enabled	ON	☒
Show Debug Items	OFF	☐

The table below describes the settings available in this section.

Global Admin Settings	
Parameter	Description
Allowed Customer Languages	The list of customer languages allowed in icePay.
Allowed Payment Providers	The list of payment providers allowed in icePay.
Consult UC Addresses	The list of sip addresses used to consult and conference icePay and the agent into the client call.
Local Time Zone	The time zone displayed in the Transactions page and in icePay reports.
API Keys Enabled	Determines if the API Keys settings page is available.
Purchase Enabled	Show or hide the Purchase page.
Transaction Status Timeout	Duration of time in milliseconds that icePay waits for a response from the payment authorizer. The transaction will be cancelled if the response is not received within the specified duration.

Global Admin Settings	
Parameter	Description
DNIS Wagon Wheel Enabled	Show or hide the wagon wheel on the Purchase and Settings page.
Custom Fields Enabled	Show or hide the custom fields on the Purchase page.
Maximum Number of Custom Fields	The maximum number of custom fields that can be created in icePay.
Purchase Paste Enabled	Show or hide the <i>paste</i> button on the Purchase page.
Purchase Paste RegEx Enabled	Enable parsing the pasted value based on a regular expression.
Purchase Copy Enabled	Show or hide the copy button on the Purchase page.
Purchase Copy RegEx Enabled	Enable parsing the copied value based on a regular expression.
Refund Enabled	Enable or disable the processing of refunds.
Transactions Page Enabled	Show or hide the transactions page.
Show Debug Items	Show or hide debug items.



Chapter 2: Purchase

icePay allows agents to handle customer transactions while masking the customer's payment information. From the web interface, agents can enter the transaction details and start the purchase.

To handle a purchase, the agent must first be on a call. The purchase page allows the agent to enter the transaction parameters, both mandatory and optional.

Once the purchase is completed, the details will be available to view in the 'Return Results' section.

Purchase Page

The Purchase page consists of three sections: transfer number, transaction and return results.

In certain deployment scenarios, the transfer number section may not be used by agents and can be hidden from view.

Note: For non-icePhone users, if the agent's iceManager browser tab refreshes while a transaction is in progress, upon returning to the icePay purchase page, if the agent is still in the conference state, the active transaction will be retrieved.

For more information, refer to *Chapter 5: Supported Deployment Scenarios*.

The screenshot shows the icePay web interface. At the top is a navigation bar with links: HOME, MONITOR, JOURNAL, SURVEY, REPORTS, ICEBAR, ACTIVE CONTACTS, and ICEPAY. Below this is a sidebar with a menu icon and a 'Purchase' link highlighted with a red box. The main content area has a yellow warning banner that reads: 'You are not on a call. Please connect with a contact before using icePay.' Below the banner are three sections: 'TRANSFER NUMBER' with a blue 'GET' button and a text input field; 'TRANSACTION'; and 'RETURN RESULTS'.

Transfer Number

The transfer number is pulled from a pool of phone numbers assigned in icePay to start the icePay call flow. This option is used by agents not using ice as the contact center. For more information, refer to Chapter 5: Supported Deployment Scenarios.

This is a close-up of the 'TRANSFER NUMBER' section from the screenshot. It features a blue 'GET' button followed by a text input field and a small copy icon to the right.

The *Get* button generates a transfer number in the text field to the right of the button.

Note: You can copy the transfer number using the copy icon on the right.

The number is released upon successful transfer of the caller to icePay and can be reallocated to another agent. To manually release the number, click on the *Release* button.

Transaction

The transaction section contains the form fields that an agent will need to complete for the icePay transaction. These fields are configurable in the Settings page. For more information, refer to *Settings*.

Note: Optional fields are marked with an “(Optional)” label in the field name.

Once the card information collection process has begun, all of the fields available in the transaction section will be locked.

The table below describes the fields available in this section.

Transaction	
Field	Description
Order Number	Order number to associate with the icePay transaction.
Customer Language	Language of the icePay voice prompts. Note: This is a mandatory field and cannot be hidden.

Transaction	
Field	Description
Customer Name	Name of the customer.
Customer Email	Email address of the customer.
Store Name	Payment authorizer and account ID that will be used by icePay for the transaction. Note: This is a mandatory field and cannot be hidden.
Transaction Amount	The amount to be processed by icePay. Note: This field is only required when <i>process payment</i> is enabled.
Custom Fields	Administrators can configure a maximum of 10 custom fields in Settings.

The table below describes the buttons available in this section.

Transaction	
Button	Description
Clear	Resets the transaction fields to their default values. Note: If you navigate away from the Purchase page without clearing the fields, you will see the error message below.  LEAVE ICEPAY? The icePay form is currently filled. Form information will be lost and in progress transactions may continue without able to display return results. Are you sure you want to leave? YES NO
Paste	Allows users to paste concatenated fields that are parsed into their corresponding fields based on a regular expression defined in Settings. The availability of this button is configured in the Global Admin Settings.
Start	Starts an icePay conference with the caller, agent and icePay to handle the transaction.

Transaction	
Button	Description
Cancel	Ends the icePay conference and returns the caller to a two party call with the agent. Note: The Cancel button is only available when the StatusCode is CREATED (1) or IN PROGRESS (2).

Return Results

The return results section contains the information returned by icePay from a credit card tokenization or payment during a transaction.

RETURN RESULTS

icePay Transaction ID

Status Code

Masked PAN

Expiry Date

Card Type

Token

Authorization Code

Store Result Code

Store Result Description

Store Transaction ID

Actions

COPY

The copy button at the bottom of the section copies all of the 'Return Results' fields into a concatenated entry to the agent's clipboard. The availability of the button is configured in Global Admin Settings.

Note: The returned results can be copied individually to the agent's clipboard by clicking on the copy icon next to each field.

The table below describes each field.

Return Results	
Field	Description
icePay Transaction ID	ID returned by the payment authorizer. This will be displayed immediately after the purchase process starts.
Status Code	Returned status code by the icePay transaction. This will update as the transaction goes through creation, workflow, errors, etc.

Return Results	
Field	Description
Masked PAN	Masked credit card number.
Expiry Date	Expiry date of the credit card.
Card Type	Credit card processor. Supported processors include: • Visa • Mastercard • Amex
Authorization Code	Code returned by the payment authorizer.
Store Result Code	Code returned by the payment authorizer when <i>process payment</i> is enabled.
Store Result Description	A description of the payment result code.
Store Transaction ID	Returned ID by the payment authorizer when <i>process payment</i> is enabled.



Chapter 3: Transactions

The Transactions page displays a list of icePay transactions and their details.

The visibility of this page is configured in Settings. Additionally for each Store, administrators can configure users' transaction visibility settings by allowing them to view all transactions, or only their own.

Transactions

The transactions grid can only be viewed by authorized users as per the settings configured by the administrator. For more information on how to configure user permissions, refer to *Managing Stores*.

TRANSACTIONS 								
 Drag here to set row groups								
	ID	Date	Time	Order Number	Store	Amount	Status	Contact ID
Columns	1065	2024-11-07	11:45:19 AM	133	Bambora (2)	\$13.50	Processed (6)	8451
	1064	2024-11-05	03:55:33 PM	1551	Moneris (1)	\$0.00	Moneris GetToken Exception (163)	8421
Filters	73	2024-07-18	09:50:53 AM	3	Moneris (1)	\$0.00	Tokenized (5)	4211
	72	2024-07-18	08:52:13 AM	12	Moneris (1)	\$0.00	Customer Hang Up (70)	4181
	60	2024-07-10	11:53:50 AM	7	Moneris (1)	\$0.00	Tokenized (5)	3781
	58	2024-07-10	10:45:03 AM	1235	Moneris (1)	\$0.00	Cancelled (3)	3681
	57	2024-07-10	10:43:20 AM	6	Moneris (1)	\$0.00	Moneris ValidateCard Error (153)	3681
	54	2024-07-09	04:11:26 PM	5	Moneris (1)	\$0.00	Created (1)	3581
	53	2024-07-09	01:21:01 PM	4	Moneris (1)	\$0.00	Created (1)	3551
	52	2024-07-09	11:08:41 AM	6	Moneris (1)	\$0.00	Created (1)	3491
	49	2024-07-03	02:22:53 PM	156	Moneris (1)	\$13.99	Processed (6)	3361
	48	2024-07-03	02:18:05 PM	120	Moneris (1)	\$12.99	Processed (6)	3331
	46	2024-07-03	12:50:09 PM	1003	Moneris (1)	\$12.00	Created (1)	3261

The table below explains each column.

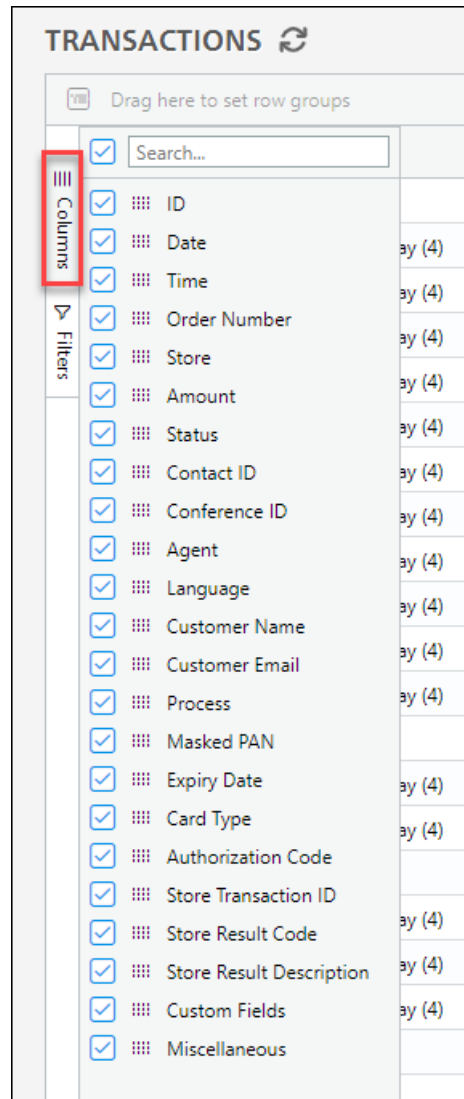
Transactions	
Column	Description
ID	icePay ID.
Date	Date when the transaction started.
Time	Time when the transaction started.
Order Number	Order number associated with the icePay transaction.
Store	Payment authorizer and account ID to be used by icePay for the transaction.
Amount	Payment amount of the transaction.
Status	Returned status code by the icePay transaction and its description.
Contact ID	ice contact ID of the original call.
Conference ID	ice contact ID of the icePay conference call.
Agent	User ID and name of the handling agent.
Language	Language used in the icePay conference.

Customer Name	Name of the caller.
Customer Email	Email of the caller.
Process	Type of icePay transaction.
Masked PAN	Masked credit card number.
Expiry Date	Expiry date of the credit card.
Card Type	Credit card processor. Supported processors include: • Visa • Mastercard • Amex
Authorization Code	Code returned by the payment authorizer.
Store Transaction ID	Returned ID by the payment provider.
Store Result Code	Code returned by the payment provider.
Store Result Description	Result description from payment provider.
Custom Fields	Name and value of the icePay custom fields. Note: This may not exist for all transactions.
Miscellaneous	Contains data that is unique to a payment provider that is not stored as its own dedicated column in the database table. Similar to custom fields, they may not exist for all transactions.
Token	The token returned by the payment authorizer of the credit card information. Note: This is only visible in the details grid.

How to configure the Grid Columns

Add Columns

1. Select *Columns* on the left side of the grid.
2. Review the list of data points and select the checkbox to add the column to the table.



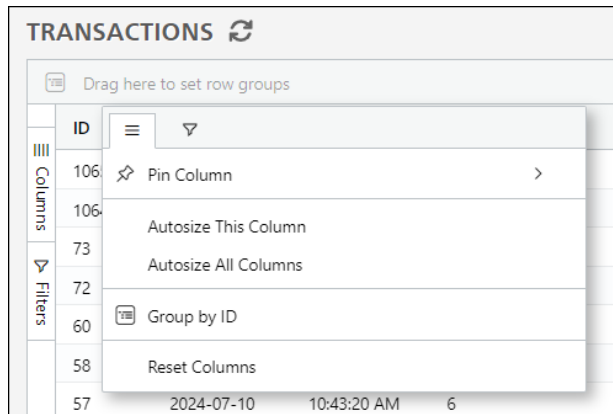
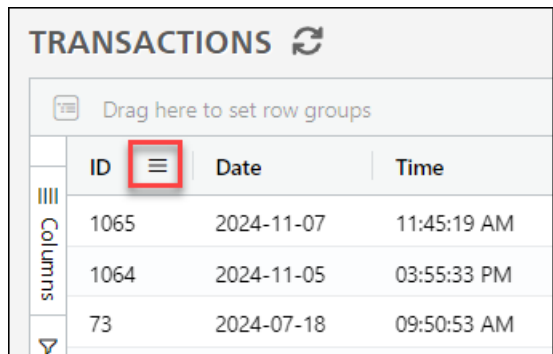
Remove Columns

1. Select *Columns* on the left side of the grid.
2. Review the list of data points and deselect the checkbox to remove the column from the table.

Note: Any changes made to the grid columns will be reset when navigating away from the transactions page or if the page reloads.

Column Header Actions

Click the *Actions* button on the right side of the column name as shown below to open the menu of options.



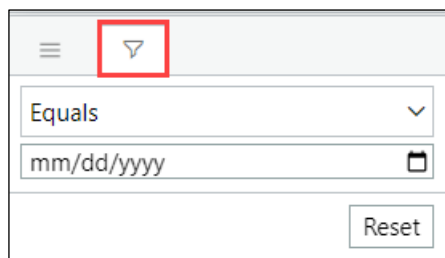
Select an option from the menu to configure the columns in the grid.
The table below describes the available menu actions.

Transactions Actions Menu	
Menu Option	Description
Pin Column	Select this option to lock the column to one side of the table. Options include: - Pin Left - Pin Right - No Pin
Autosize This Column	Resize the selected column to only the necessary width.
Autosize All Columns	Resize all columns to only the necessary width.

Group by Column Name	Categorize or group the rows by the selected column value.
Reset Columns	Revert column settings to the default settings.

Column Header Filters

Click the *Filters* button beside the Actions menu to open the Filter options.

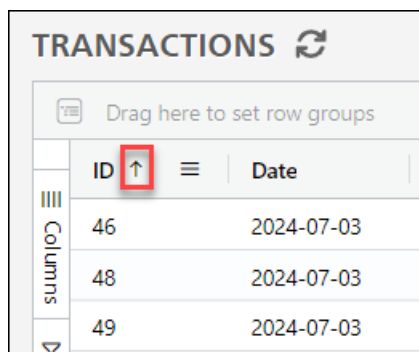


The grid will refresh according to the filter conditions applied.

The column header filters corresponds to the filter options discussed on page 35.

Column Header Sorting

Select the column name to sort the rows in the table by the selected column.



ID	Date
46	2024-07-03
48	2024-07-03
49	2024-07-03

TRANSACTIONS ↻

⌵ Drag here to set row groups

	ID ↓	Date
Columns	1065	2024-11-07
	1064	2024-11-05
	72	2024-07-10

Filter Options

Click the Filters tab on the left of the grid and use the data points available to filter your list of transactions.

TRANSACTIONS ↻

⌵ Drag here to set row groups

Search...

Columns

Filters

> ID

> Date

> Time

> Order Number

> Store

> Amount

> Status

> Contact ID

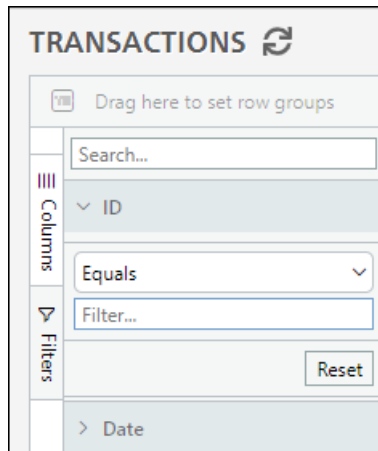
> Conference ID

> Agent

> Language

> Customer Name

> Process

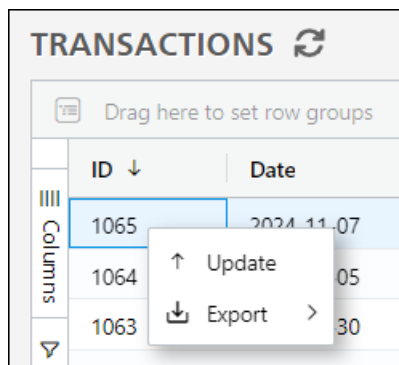


The grid will refresh according to the filter conditions applied.

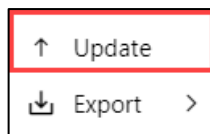
Note: Any changes made to the filter options will be reset when navigating away from the transactions page, or if the page reloads.

Right-Click Menu

Right-click on a row in the grid to update the transaction status or export the transaction details.



The *Update* option allows you to update the transaction.



UPDATE TRANSACTION

Status

TOKENIZED (5)

OK

Cancel

For more information on each of the statuses, please refer to Appendix A: Status Codes on page 79.

The *Export* option allows you to export all rows in the grid.

↑ Update

↓ Export >

Select from CSV and Excel file formats.

TRANSACTIONS ↻

Drag here to set row groups

	ID ↓	Date	Time	Order
Columns	1065	2024-11-07	11:45:19 AM	133
	1064	05	03:55:33 PM	1551
	1063			1111
	1062	2024-10		1234
	1061	2024-10-30	11:40:44 AM	1234

↑ Update

↓ Export >

CSV Export

Excel Export (.xlsx)

Note: Only Global Administrators will have access to the *Update* option in the right-click menu.

Details Grid

To see more information about a transaction:

1. Click on the row in the transactions grid.
2. The Details Table for that transaction will display.

TRANSACTIONS						TRANSACTION - 1065	
Drag here to set row groups						Information Activity	
ID ↓	Date	Time	Order Number	Store	Status	Property	Value
1065	2024-11-07	11:45:19 AM	133	Bambora	Processed	ID	1065
1064	2024-11-05	03:55:33 PM	1551	McDonald's	Processed	Start Time	2024-11-07 11:45:19 AM
73	2024-07-18	09:50:53 AM	3	McDonald's	Processed	Order Number	133
72	2024-07-18	08:52:13 AM	12	McDonald's	Processed	Store	Bambora (2)
60	2024-07-10	11:53:50 AM	7	McDonald's	Processed	Amount	\$13.50
58	2024-07-10	10:45:03 AM	1235	McDonald's	Processed	Status	Processed (6)
57	2024-07-10	10:43:20 AM	6	McDonald's	Processed	Original Contact ID	8451
54	2024-07-09	04:11:26 PM	5	McDonald's	Processed	Consult Contact ID	8461
53	2024-07-09	01:21:01 PM	4	McDonald's	Processed	Conference Contact ID	8471
52	2024-07-09	11:08:41 AM	6	McDonald's	Processed	Agent	Training (1000)
49	2024-07-03	02:22:53 PM	156	McDonald's	Processed	Language	English
48	2024-07-03	02:18:05 PM	120	McDonald's	Processed	Customer Name	John P
46	2024-07-03	12:50:09 PM	1003	McDonald's	Processed	Customer Email	
						Process	Tokenize and Pay (4)
						Masked PAN	*****1234
						Expiry Date	10/25
						Card Type	Visa
						Token	Ⓢ
						Authorization Code	TEST
						Store Result Code	1
						Store Result Description	Approved
						Store Transaction ID	10000031
						Custom Fields	Postal Code: L3T 7Z3
							Billing Name: John P
						Miscellaneous	

The Details Grid consists of the following sections:

- Information
 - Details returned for the transaction
- Activity
 - The steps of the transaction

The list of all transactions are displayed on the left, allowing for easy comparison among transactions. You can view the Details grid for other transactions by clicking on the rows in the grid on the left.

Information

The table below describes the right-click menu options available on the Details Grid Information tab.

Details Grid Information Tab Right-click Menu	
Menu Option	Description
Filter for Value	Filters the Transactions grid based on the value selected.
Copy Text	Copies the value selected.
Copy Value	Available if there is a custom text label.
View Contact in Journal	Opens the contact in Journal. This option is only available for the following rows: • Original Contact ID • Consult Contact ID • Conference Contact ID
Export	Exports all of the details available in the Information tab on your local machine. Options include: • CSV Export • Excel Export
Reset Filter	Only available when the <i>Filter for Value</i> option is selected. This resets the current filter selected.

Activity

The activity tab lists the steps of the transaction in sequential order.

TRANSACTIONS 					TRANSACTION - 1065 ↑ ↓ ×		
Drag here to set row groups					Information Activity		
ID ↓	Date	Time	Order Number	Stc	Timestamp	Event	Data
1065	2024-11-07	11:45:19 AM	133	Bar	2024-11-07 11:45:20 AM	Plugin Consult Setup (1...	
1064	2024-11-05	03:55:33 PM	1551	Mc	2024-11-07 11:45:21 AM	Workflow Setup (2020)	
73	2024-07-18	09:50:53 AM	3	Mc	2024-11-07 11:45:24 AM	Workflow Setup Confer...	
72	2024-07-18	08:52:13 AM	12	Mc	2024-11-07 11:45:25 AM	Workflow Collect (2030)	
60	2024-07-10	11:53:50 AM	7	Mc	2024-11-07 11:45:25 AM	Update Status (100)	In Progress (2)
58	2024-07-10	10:45:03 AM	1235	Mc	2024-11-07 11:45:25 AM	Workflow Collect Get Tr...	
57	2024-07-10	10:43:20 AM	6	Mc	2024-11-07 11:45:25 AM	Workflow Collect PAN (...)	
54	2024-07-09	04:11:26 PM	5	Mc	2024-11-07 11:45:51 AM	Workflow Collect PAN S...	
53	2024-07-09	01:21:01 PM	4	Mc	2024-11-07 11:45:51 AM	Workflow Collect EXP (...)	
52	2024-07-09	11:08:41 AM	6	Mc	2024-11-07 11:46:12 AM	Workflow Collect EXP S...	
49	2024-07-03	02:22:53 PM	156	Mc	2024-11-07 11:46:12 AM	Workflow Collect CVV (...)	
48	2024-07-03	02:18:05 PM	120	Mc	2024-11-07 11:46:30 AM	Workflow Collect CVV S...	
46	2024-07-03	12:50:09 PM	1003	Mc	2024-11-07 11:46:33 AM	Workflow Collect Send...	
					2024-11-07 11:46:33 AM	Update Status (100)	Collected (4)
					2024-11-07 11:46:33 AM	Update Status (100)	Tokenized (5)
					2024-11-07 11:46:33 AM	icePay Web Service Get...	
					2024-11-07 11:46:34 AM	Update Status (100)	Processed (6)
					2024-11-07 11:46:34 AM	icePay Web Service Pay...	
					2024-11-07 11:46:34 AM	Workflow Collect Send...	
					2024-11-07 11:46:37 AM	Workflow Wrap Up (20...	
					2024-11-07 11:46:37 AM	Workflow Wrap Up Res...	
					2024-11-07 11:46:37 AM	Workflow Wrap Up End...	

The table below describes the right-click menu options available on the Details Grid Activity tab.

Details Grid Information Tab Right-click Menu	
Menu Option	Description
Export	Exports all of the details available in the Activity tab on your local machine. Options include: • CSV Export • Excel Export



Chapter 4: Stores

A store is a payment authorizer that will be used in icePay. The Stores page contains all the stores configured to be used in icePay to handle transactions.

Administrators can add, remove and edit stores to be used by agents when handling transactions. Agents can only select from the stores that they have been assigned.

Managing Stores

This section can only be modified by administrators. Supervisors have view rights and are able to view the settings configured for each store.

All created stores will be listed in this table. Stores can be viewed, added, reactivated, and modified from the options provided.

STORES						
ADD						
ID	Name	Order	Provider	Environment	Store ID	Action
1	Default Store	0	TD Bambora	Prod	123	 

The table below explains each column.

Stores	
Column	Description
ID	Identification number of the store.
Name	Name of the store to be used in icePay.
Order	Illustrates the order that the stores will appear in the payment drop down field. Use the arrows to change the order of the stores.
Provider	Payment authorizer.
Environment	Options include: • Production • Testing
Store ID	The account ID to be used by icePay.

The next section of this document describes the Actions that can be taken with a Store.

Note: Stores can only be deleted by the Global Administrator. Please contact Computer Talk for more information.

Edit a Store



To edit an existing store, click the pencil. The store form appears, and you can proceed to edit the necessary sections.

The arrows in the top right corner of the page allow you to navigate between the existing stores to modify their settings.



Activate/Deactivate a Store

To activate a store, enable the active toggle.



To deactivate a store instead of deleting it, disable the active toggle.



Create a new Store

Add a Store

To create a new store, complete the following steps:

1. Click *Add*. The stores form appears.

Note: All fields are mandatory.

← STORES

ADD

Name

Description

Provider

Environment

Store ID

Store Key

PERMISSIONS

ADD PERMISSION

Type	Value	Action	Permission	Action
Role	x User	+	Select Permission	🗑️

CUSTOM FIELDS

2. Enter the name of the store.
3. Enter a detailed description of the store.
4. Select the provider.
5. Enter the environment, selecting from production or development.
6. Enter the Store ID.

7. Enter the Store Key.

The table below provides information on the options found on this page.

Stores	
Parameter	Description
Name	Store name to be used in icePay.
Description	Detailed description of the store.
Provider	Payment authorizer.
Environment	Production or development.
Store ID	The account ID to be used by icePay.
Store Key	Key used by icePay to log into the payment authorizer account.

Permissions

You can configure the access for different users in the permissions section of the store settings.

PERMISSIONS

ADD PERMISSION

Type	Value	Action	Permission	Action
Role	User	+	Purchase (Process Payment)	✕

1. Select a grouping type. Options include: default, user, team and role.

To set the default permissions for all users, select *Default*.

To set permissions for specific users, select *User*.

To set permissions for users by team, select *Teams*.

To set permission for users by role, select *Role*.

2. Select the value. The users are specified based on the "type" selected.

Users: users are selected from a list of ice users.

Teams: users are selected from a list of ice teams.

Roles: users are selected based on their ice user type.

3. Select the permission(s). Options include:

Purchase (Process Payment)

Purchase (Tokenize)

Purchase (Tokenize & Pay)

Transaction History (Self)

Transaction History (All)

The table below provides information on the permission(s) options found on this page.

Permission(s) Options	
Option	Description
Purchase (Process Payment)	Agent can process the payment for the store without tokenizing the credit card.
Purchase (Tokenize)	Agent can tokenize the card for the store.
Purchase (Tokenize & Pay)	Agent can process the payment and tokenize the card for the store.
Transaction History (Self)	Agent can view their own transaction history for the store.
Transaction History (All)	Agent can view all transaction history for the store.

- To set multiple conditions within the same permission, click the plus (+) sign under the 'Action' column. This will allow you to group together multiple conditions in an "AND" statement. Ungrouped conditions are considered "OR" statements.

Note: If a user meets all conditions within a permission, they will be granted all permissions in the Permission column. If the user meets all the conditions in multiple permissions, they will be granted all of the listed permissions.

For example, in the screenshot below, users with a User ID from 2000-3000, who are configured as ice administrators will have access to all transaction history and will be able to process payments.

Type	Value	Action	Permission	Action
User	2000 - 3000	+	x Purchase (Process Payment) x Transaction History (All)	-
Role	x Administrator	+ -		

Provider Settings

The payment provider specific settings can be configured in this section.

Note: Each provider will have different settings. These settings will be configured during set up and will not require frequent modifications.

Moneris

PROVIDER SETTINGS

Use Permanent Token	OFF	☐
Legacy Store	OFF	☐
Crypt Type	7	
Processing Country Code	CA	
Retention	360	
Legacy Gateway URL	esqa.moneris.com	
Use Issuer ID	OFF	☐

The table below provides information on the Moneris Provider settings found on this page.

Provider Settings	
Option	Description
Use Permanent Token	Enable this setting to use permanent token.
Legacy Store	Enable this setting if the Moneris store is a legacy store.
Crypt Type	Indicates how the card number was acquired. Options include: • 1 – Mail/Telephone order Single • 2 – Mail/Telephone order Recurring • 3 – Mail/Tepehone order Installment • 4 – Mail/Telephone order Unknown classification • 5 – Authenticated transaction • 6 – Authenitcation Attempted • 7 – SSL transaction
Processing Country Code	The processing country code. For example, CA.
Retention	The amount of time to keep the token.
Legacy Gateway URL	The URL for the legacy gateway if applicable.
Use Issuer ID	Enable this setting and <i>Issuer ID Receive</i> in transaction settings below for additional token identification purposes.

Bambora

PROVIDER SETTINGS

API Version

1

API URL for Tokenization

<https://web.na.bambora.com/>

The table below provides information on the Bambora Provider settings found on this page.

Provider Settings	
Option	Description
API Version	The Bambora API version.
API URL for Tokenization	The Bambora API URL for Tokenization.

TrustCommerce

PROVIDER SETTINGS 

API URL

The table below provides information on the TrustCommerce Provider setting found on this page.

Provider Settings	
Option	Description
API URL	The TrustCommerce API URL.

Transaction Settings

The transactions settings can be modified in this section.

TRANSACTION SETTINGS

Transaction Amount Enabled

ON

Transaction Amount Required

ON

Transaction Amount Minimum

1

Transaction Amount Maximum

9999

Order Number Enabled

ON

Order Number Required

ON

Order Number Minimum Length

1

Order Number Maximum Length

100

Customer Name Enabled

ON

Customer Name Required

OFF

Customer Name Minimum Length

3

Customer Name Maximum Length

255

Customer Name Send to Payment Provider

OFF

Customer Email Enabled

OFF

Customer Language Enabled

OFF

Customer Language Default

Issuer ID Receive

OFF

The table below provides information on the transaction settings found in this section.

Transaction Settings	
Option	Description
Transaction Amount Enabled	Determines if the transaction amount field on the purchase page is visible.
Transaction Amount Required	Determines if the transaction amount field is a mandatory field.
Transaction Amount Minimum	The minimum value accepted by the transaction amount field.
Transaction Amount Maximum	The maximum value accepted by the transaction amount field.
Order Number Enabled	Determines if the order number field on the purchase page is visible.
Order Number Required	Determines if the order number field is a mandatory field.
Order Number Minimum Length	The minimum number of characters accepted by the field.
Order Number Maximum Length	The maximum number of characters accepted by the field.
Customer Name Enabled	Determines if the customer name field on the purchase page is visible.
Customer Name Required	Determines if the customer name field is a mandatory field.
Customer Name Minimum Length	The minimum number of characters accepted by the field.
Customer Name Maximum Length	The maximum number of characters accepted by the field.
Customer Name Send to Payment Provider	Determines if the customer's name is sent to the payment provider.
Customer Email Enabled	Determines if the customer email field on the purchase page is visible.
Customer Email Minimum Length	The minimum number of characters accepted by the field.
Customer Email Maximum Length	The maximum number of characters accepted by the field.
Customer Email Send to Payment Provider	Determines if the customer's email is sent to the payment provider.
Customer Language	Determines if the language selection field on the purchase page is

Transaction Settings	
Option	Description
Enabled	visible.
Customer Language Send to Payment Provider	Determines if the customer's language is sent to the payment provider.
Customer Language Default	The default language that the icePay call flow will use to play the audio messages.
Issuer ID Receive	Determines if the issuer ID is displayed in the transaction output. If enabled, Use issuer ID in Provider Settings should also be enabled. Certain providers may require this for additional authentication.

Custom Fields

You can configure the Custom Fields that are displayed in the purchase tab for this payment provider.



The screenshot shows a user interface for configuring custom fields. At the top, there is a header 'CUSTOM FIELDS' with an upward-pointing chevron icon to its right. Below this header, there is a label 'Custom Fields' followed by a long, empty rectangular input field. To the right of the input field is a small downward-pointing chevron icon, indicating a dropdown menu.

The Custom Fields drop-down list contains the available custom fields for the payment provider. For the fields to be included in the drop-down list, they must meet *one* of the following:

- Custom Field is enabled and Send to Payment Provider is disabled
OR
- Custom Field is enabled, Send to Payment Provider is enabled, and Payment Provider Field contains a valid entry.

Select the fields that you would like displayed on the Purchase page.

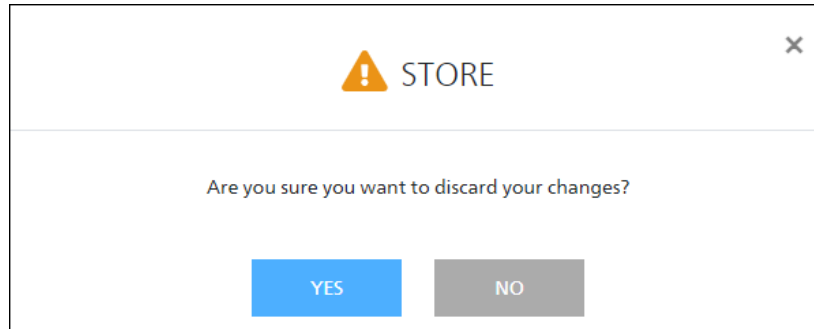
Note: If a Custom Field is configured in the Store settings, and subsequently disabled in the Custom Field settings, it will be hidden from view in this section, and will only be visible once it is re-enabled. It does not need to be configured again in this section once it is enabled, unless it has been manually removed from the Store settings.



The screenshot shows a dialog box titled "CUSTOM FIELDS" with a close button (X) in the top right corner. Below the title bar, there is a section labeled "Custom Fields" containing two tabs: "Postal Code" and "Billing Name". A small "X" icon is visible to the right of the tabs.

Once you are finished, click Add. If you wish to cancel this form, click the back arrow next to Stores at the top of the form page.

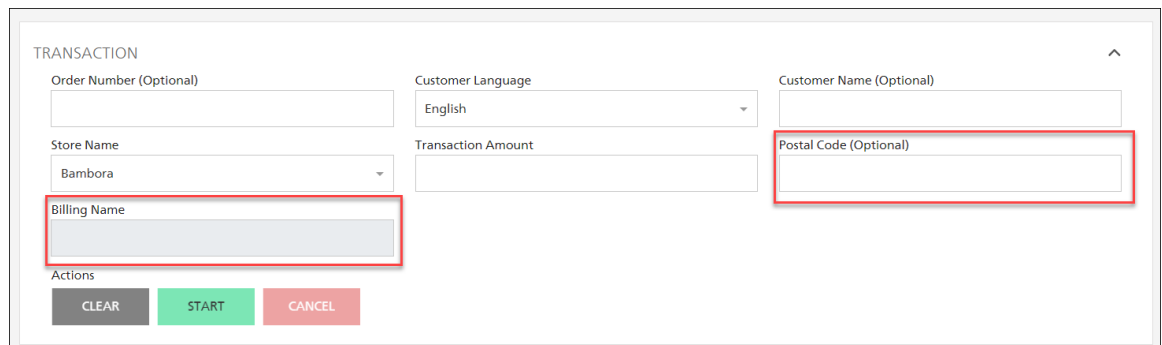
If you click the back arrow, the following message appears.



The screenshot shows a dialog box titled "STORE" with a warning icon (exclamation mark inside a triangle) and a close button (X) in the top right corner. The main text inside the dialog box asks: "Are you sure you want to discard your changes?". At the bottom, there are two buttons: "YES" (blue) and "NO" (gray).

Click 'Yes' to cancel the store form or click 'No' to continue modifying the store form.

The image below shows the custom fields *Postal Code* and *Billing Name* enabled on the purchase tab.



The screenshot shows a form titled "TRANSACTION" with a close button (X) in the top right corner. The form contains several input fields and a dropdown menu. The fields are: "Order Number (Optional)", "Store Name" (with a dropdown menu showing "Bambora"), "Billing Name", "Customer Language" (with a dropdown menu showing "English"), "Transaction Amount", "Customer Name (Optional)", and "Postal Code (Optional)". The "Billing Name" and "Postal Code (Optional)" fields are highlighted with red boxes. At the bottom, there is an "Actions" section with three buttons: "CLEAR", "START", and "CANCEL".



Chapter 5: Supported Deployment Scenarios

icePay supports a number of different deployment scenarios to meet your transaction needs.

- Using icePay GUI to Process Payment
- Using icePay GUI to Tokenize Payment
- Using Client Payment Hub to Process Payment
- Using Client Payment Hub to Tokenize Payment
- Using Client Payment Hub to Process/Tokenize Payment from External Call System with Azure Active Directory with Wagon Wheel
- Using icePay GUI with Wagon Wheel to Process Payment
- Using icePay GUI with Wagon Wheel to Tokenize Payment

This section will discuss the steps agents need to take to handle transactions according to the different deployment scenarios.

Deployment Scenarios

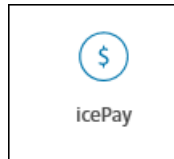
This section will explore the various deployment scenarios supported by icePay.

Using icePay GUI to Process Payment

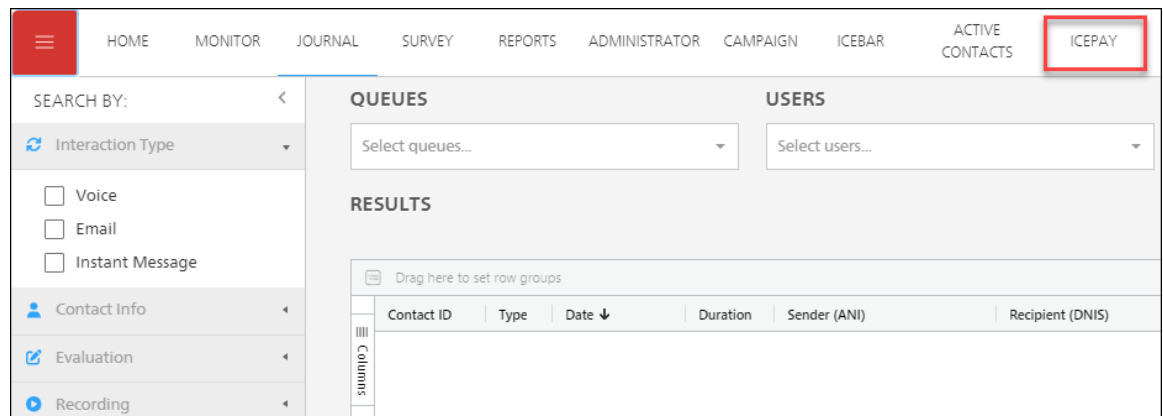
1. Ensure the agent is on a call with a customer. If the agent is not currently handling a call, they will see the following message when opening icePay.

You are not on a call. Please connect with a contact before using icePay.

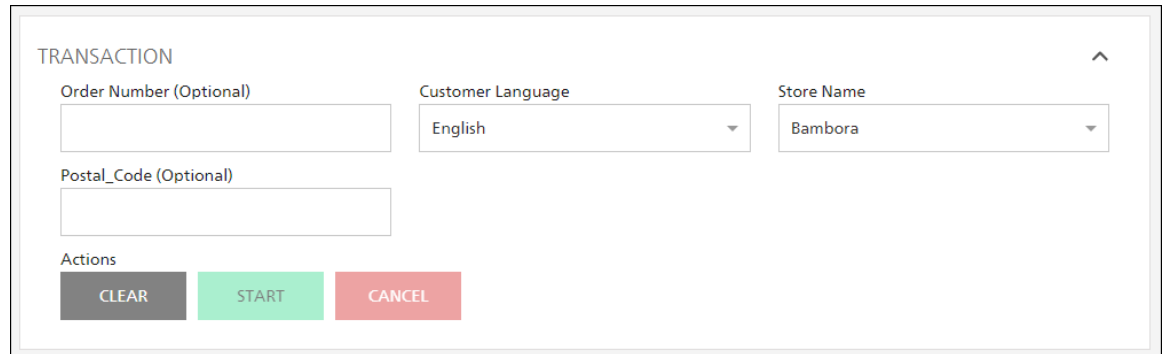
2. Launch the icePay GUI from the icePay button on the iceBar



or by logging in to the iceManager website and selecting the icePay tab.



3. The agent will enter the necessary information in the Transaction input fields.



TRANSACTION ^

Order Number (Optional)

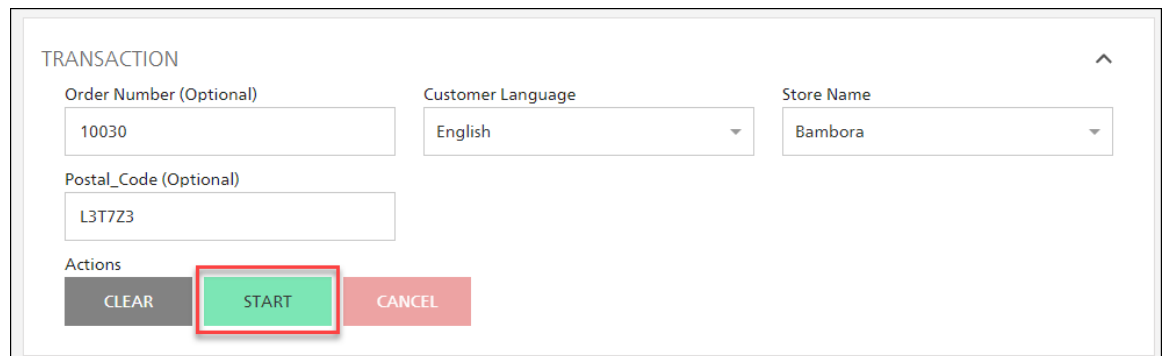
Customer Language

Store Name

Postal_Code (Optional)

Actions

- Once the fields are complete, the agent will click on the *Start* button to conference icePay into the call with the customer.



TRANSACTION ^

Order Number (Optional)

Customer Language

Store Name

Postal_Code (Optional)

Actions

- The customer will be prompted by the icePay call flow to provide their credit card information to process the payment.

Note: To cancel the transaction, click the *Cancel* button to exit the icePay conference. The *Cancel* button is only available when the Status Code is either *Created (1)* or *In Progress (2)*. It will not be available after the payment information has been collected.

- When the payment is processed, the results are returned in the Return Result section and the conference ends.

RETURN RESULTS		
icePay Transaction ID 1217	Status Code Tokenized (5)	Masked PAN *****5454
Expiry Date 12/26	Card Type	Token ot-642jCA31UChji346BCbQdgKg4
Authorization Code	Store Result Code 001	Store Result Description Sucessfully registered CC details.
Store Transaction ID		

The agent returns to a two-party call with the customer.

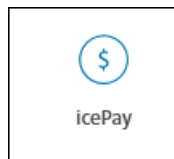
- The agent can now release the call.
- Post-call handling processes are dependent on individual business requirements. Agents can use the *Copy* button at the bottom of the section to copy all of the results concatenated together into one term, to be parsed by a regular expression. Alternatively, agents can copy each individual field, using the copy icon to the right of the field.

Using icePay GUI to Tokenize Payment

- Ensure the agent is on a call with a customer. If the agent is not currently handling a call, they will see the following message when opening icePay.

You are not on a call. Please connect with a contact before using icePay.

- Launch the icePay GUI from the icePay button on the iceBar



or by logging in to the iceManager website and selecting the icePay tab.

SEARCH BY: <

Interaction Type

☐ Voice

☐ Email

☐ Instant Message

Contact Info

Evaluation

Recording

QUEUES

Select queues...

USERS

Select users...

RESULTS

Drag here to set row groups

Contact ID	Type	Date ↓	Duration	Sender (ANI)	Recipient (DNIS)
Columns					

- The agent will enter the necessary information in the Transaction input fields.

TRANSACTION

Order Number (Optional)

Postal_Code (Optional)

Customer Language

English

Store Name

Bambora

Actions

CLEAR START CANCEL

- Once the fields are complete, the agent will click on the *Start* button to conference icePay into the call with the customer.

TRANSACTION

Order Number (Optional)

10030

Postal_Code (Optional)

L3T7Z3

Customer Language

English

Store Name

Bambora

Actions

CLEAR START CANCEL

- The customer will be prompted by the icePay call flow to provide their tokenized credit card information.

Note: To cancel the transaction, click the *Cancel* button to exit the icePay conference.

The *Cancel* button will not be available after the payment information has been collected.

- The results of the tokenization are returned in the Return Result section and the conference ends.

The screenshot displays a 'RETURN RESULTS' section with a grid of fields. Each field has a copy icon to its right. The fields and their values are as follows:

RETURN RESULTS		
icePay Transaction ID	Status Code	Masked PAN
1217	Tokenized (5)	*****5454
Expiry Date	Card Type	Token
12/26		ot-642jCA31UChji346BCbQdgKg4
Authorization Code	Store Result Code	Store Result Description
	001	Successfully registered CC details.
Store Transaction ID		

The agent returns to a two-party call with the customer.

- The agent can now release the call.
- Post-call handling processes are dependent on individual business requirements. Agents can use the *Copy* button at the bottom of the section to copy all of the results concatenated together into one term, to be parsed by a regular expression. Alternatively, agents can copy each individual field, using the copy icon to the right of the field.

Using Client Payment Hub to Process Payment

- Ensure the agent is on a call with a customer.
- The agent will open their payment hub and enter the necessary information in the input fields.
- The agent will click on a button on their payment hub to conference icePay into the call with their customer. This will be completed through a web service integration.
- The customer will be prompted by the icePay call flow to provide their credit card information to process the payment.
- When the payment is processed, icePay returns the results to the payment hub. The conference with icePay ends and the agent returns to a two-party call with the customer.

6. The agent can now release the call with the customer.
7. Post-call handling processes are dependent on individual business requirements.

Using Client Payment Hub to Tokenize Payment

1. Ensure the agent is on a call with a customer.
2. The agent will open their payment hub and enter the necessary information in the input fields.
3. The agent will click on a button on their payment hub to conference icePay into the call with their customer. This will be completed through a web service integration.
4. The customer will be prompted by the icePay call flow to provide their tokenized credit card information.
5. icePay returns the results of the tokenization to the payment hub. The conference with icePay ends and the agent returns to a two-party call with the customer.
6. The agent can now release the call with the customer.
7. Post-call handling processes are dependent on individual business requirements.

Using Client Payment Hub to Process/Tokenize Payment from External Call System with Azure Active Directory with Wagon Wheel

1. The system will get the corresponding Agent ID to Active Directory GUID through a web service integration (GetAgentIdWithAzureGuid). This is an optional step.
2. Ensure the agent is on a call with the customer on an external call system.
3. The agent will open their payment hub and request for a wagon wheel number through a web service integration (GetDnisWagonWheelNumber).
4. The system or agent will transfer the customer to the wagon wheel number and the agent will be alerted in ice.
5. The system will ensure the agent is connected with the caller in ice through a web service integration (GetAgentState).
6. The agent will enter the necessary information in the input fields in payment hub.

7. The agent will click on a button on their payment hub to conference icePay into the call with their customer. This will be completed through a web service integration (GetCardInfo).
8. The customer will be prompted by the icePay call flow to provide their credit card information to process the payment.
9. When the payment is processed, icePay returns the results to the payment hub. The conference with icePay ends and the agent returns to a two-party call with the customer.
10. The system will get the completed transaction details and display them to the agent in payment hub through a web service integration (GetTransaction).
11. If successful, the agent can now release the call with the customer.
12. Post-call handling processes are dependent on individual business requirements.

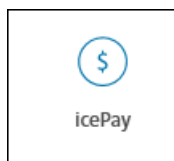
Note: For more information, refer to the *External Reference Guide*, provided separately.

Using icePay GUI with Wagon Wheel to Process Payment

1. Ensure the agent is on a call with a customer. If the agent is not currently handling a call, they will see the following message when opening icePay.

You are not on a call. Please connect with a contact before using icePay.

2. Launch the icePay GUI from the icePay button on the iceBar



or by logging in to the iceManager website and selecting the icePay tab.

HOME MONITOR JOURNAL SURVEY REPORTS ADMINISTRATOR CAMPAIGN ICEBAR ACTIVE CONTACTS **ICEPAY**

SEARCH BY: <

Interaction Type

☐ Voice

☐ Email

☐ Instant Message

Contact Info

Evaluation

Recording

QUEUES

Select queues...

USERS

Select users...

RESULTS

Drag here to set row groups

Contact ID	Type	Date ↓	Duration	Sender (ANI)	Recipient (DNIS)
Columns					

- To transfer the customer to icePay, click on the *Get* button. This generates a transfer number that can be copied using the copy icon to the right of the text field.

TRANSFER NUMBER

RELEASE 9058825000

- Transfer the caller to the transfer number. In order to have the call within ice, the agent must accept the call after transferring the caller to transfer number.
- The agent will enter the necessary information in the Transaction input fields.

TRANSACTION

Order Number (Optional)

Customer Language English

Store Name Bambora

Postal_Code (Optional)

Actions

CLEAR START CANCEL

- Once the fields are complete, the agent will click on the *Start* button to join the conference call with icePay and the customer.

TRANSACTION

Order Number (Optional)

10030

Customer Language

English

Store Name

Bambora

Postal_Code (Optional)

L3T7Z3

Actions

CLEAR

START

CANCEL

- The customer will be prompted by the icePay call flow to provide their credit card information to process the payment.

Note: To cancel the transaction, click the *Cancel* button to exit the icePay conference. The *Cancel* button will not be available after the payment information has been collected.

- When the payment is processed, the results are returned in the Return Result section and the conference ends.

RETURN RESULTS

icePay Transaction ID

1217

Status Code

Tokenized (5)

Masked PAN

*****5454

Expiry Date

12/26

Card Type

Token

ot-642jCA31UChji346BCbQdgKg4

Authorization Code

Store Result Code

001

Store Result Description

Successfully registered CC details.

Store Transaction ID

The agent returns to a two-party call with the customer.

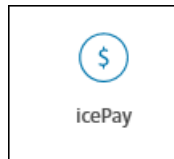
- The agent can now release the call.
- Post-call handling processes are dependent on individual business requirements. Agents can use the *Copy* button at the bottom of the section to copy all of the results concatenated together into one term, to be parsed by a regular expression. Alternatively, agents can copy each individual field, using the copy icon to the right of the field.

Using icePay GUI with Wagon Wheel to Tokenize Payment

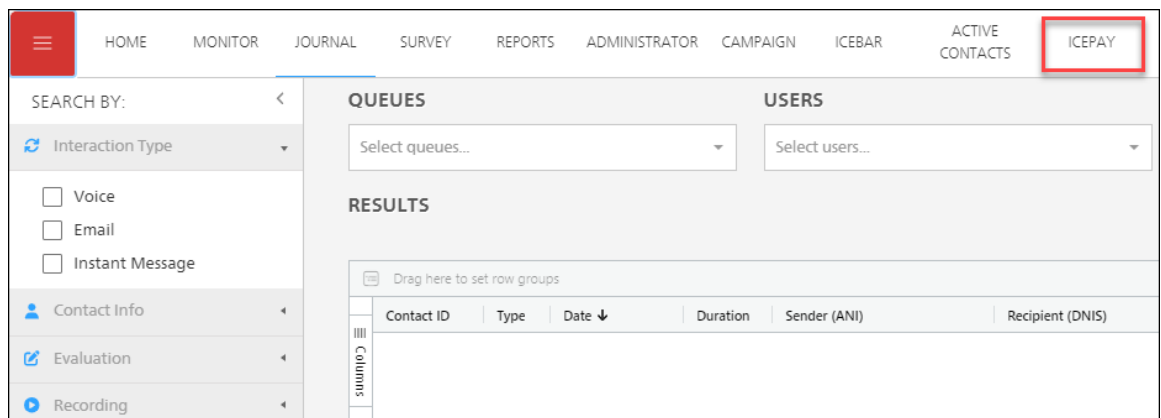
1. Ensure the agent is on a call with a customer. If the agent is not currently handling a call, they will see the following message when opening icePay.

You are not on a call. Please connect with a contact before using icePay.

2. Launch the icePay GUI from the icePay button on the iceBar



or by logging in to the iceManager website and selecting the icePay tab.

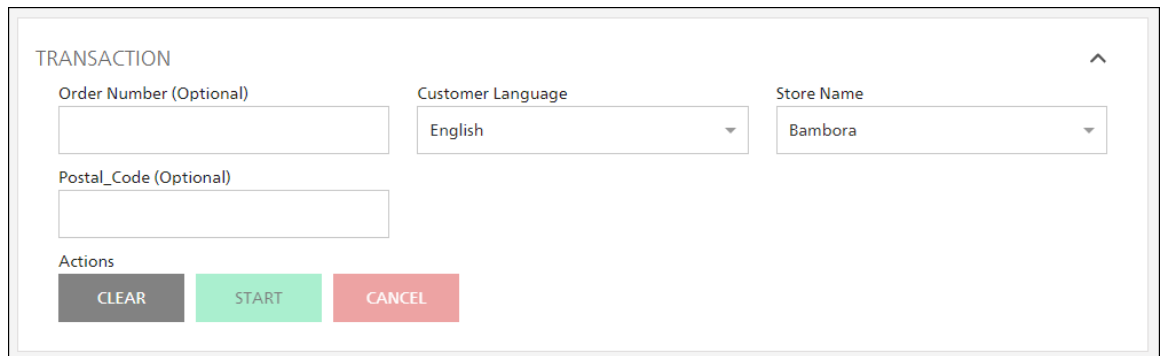


3. To transfer the customer to icePay, click on the *Get* button. This generates a transfer number that can be copied using the copy icon to the right of the text field.



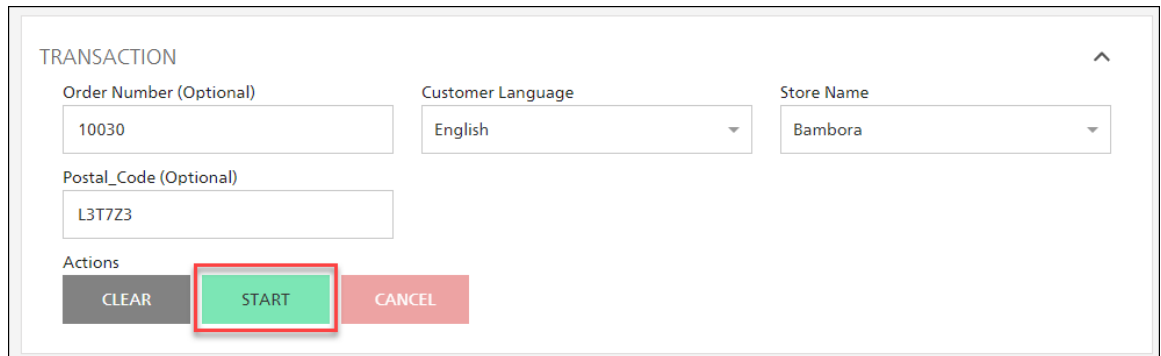
4. Transfer the caller to the transfer number. In order to have the call within ice, the agent must accept the call after transferring the caller to transfer number.

- The agent will enter the necessary information in the Transaction input fields.



The screenshot shows a form titled "TRANSACTION" with a close button (upward arrow) in the top right corner. The form contains three input fields: "Order Number (Optional)" with an empty text box, "Customer Language" with a dropdown menu showing "English", and "Store Name" with a dropdown menu showing "Bambora". Below these is a "Postal_Code (Optional)" field with an empty text box. At the bottom, under the heading "Actions", there are three buttons: "CLEAR" (grey), "START" (green), and "CANCEL" (red).

- Once the fields are complete, the agent will click on the *Start* button to join the conference call with icePay and the customer.



This screenshot shows the same "TRANSACTION" form, but now the input fields are filled: "Order Number (Optional)" contains "10030", "Postal_Code (Optional)" contains "L3T7Z3", "Customer Language" dropdown shows "English", and "Store Name" dropdown shows "Bambora". The "START" button (green) is highlighted with a red rectangular box, indicating it is the button to be clicked.

- The customer will be prompted by the icePay call flow to provide their tokenized credit card information.

Note: To cancel the transaction, click the *Cancel* button to exit the icePay conference. The *Cancel* button will not be available after the payment information has been collected.

- The results of the tokenization are returned in the Return Result section and the conference ends.

RETURN RESULTS

icePay Transaction ID

1217

Status Code

Tokenized (5)

Masked PAN

*****5454

Expiry Date

12/26

Card Type

Token

ot-642jCA31UChji346BCbQdgKg4

Authorization Code

Store Result Code

001

Store Result Description

Successfully registered CC details.

Store Transaction ID

The agent returns to a two-party call with the customer.

9. The agent can now release the call.
10. Post-call handling processes are dependent on individual business requirements. Agents can use the *Copy* button at the bottom of the section to copy all of the results concatenated together into one term, to be parsed by a regular expression. Alternatively, agents can copy each individual field, using the copy icon to the right of the field.



Chapter 6: Reports

Four canned reports are available in iceReporting for icePay. These can be found in the *custom* folder.

- icePay Transaction Report
- icePay Summary Report by Card Provider
- icePay Summary Report by User
- icePay Raw Data Report

This section will discuss each of the reports available for icePay.

icePay Transaction Report

icePay Transaction Report										
From 2024-10-27 12:00:00AM to 2024-11-02 11:59:59PM										
ID	Date Time	Agent	Contact ID	Order Number	Store	Card Type	Amount	Status	Store Result	
1,045	2024-10-29 4:45:43PM	QA Test (9901)	7841	123	Moneris (1)	Visa	\$1.00	PROCESSED (6) 1436-0_940_027, APPROVED	*	=, T35102
1,046	2024-10-29 4:56:21PM	QA Test (9901)	7871	123	Bambora (2)		\$1.00	BAMBORA_PAYWITHTOKEN_ERROR (111) Category 1, Code: 7, PaymentRequired, category: 1, code: 7: DE		
1,047	2024-10-29 4:58:19PM	QA Test (9901)	7901	123	Bambora (2)		\$1.00	BAMBORA_PAYWITHTOKEN_ERROR (111) Category 1, Code: 7, PaymentRequired, category: 1, code: 7: DE		
1,048	2024-10-29 5:06:31PM	QA Test (9901)	7931	123	Bambora (2)		\$1.00	BAMBORA_PAYWITHTOKEN_ERROR (111) Category 1, Code: 7, PaymentRequired, category: 1, code: 7: DE		
1,049	2024-10-30 9:57:32AM	QA Test (9901)	7961	123	Moneris (1)	Visa	\$1.00	PROCESSED (6) 1438-0_941_027, APPROVED	*	=, T36418
1,050	2024-10-30 9:59:37AM	QA Test (9901)	7991	123	Bambora (2)		\$1.00	BAMBORA_PAYWITHTOKEN_ERROR (111) Category 1, Code: 7, PaymentRequired, category: 1, code: 7: DE		
1,051	2024-10-30 10:38:57AM	QA Test (9901)	8021	123	Bambora (2)		\$1.00	BAMBORA_PAYWITHTOKEN_ERROR (111) Category 1, Code: 7, PaymentRequired, category: 1, code: 7: DE		
1,052	2024-10-30 10:45:03AM	QA Test (9901)	8051	123	Bambora (2)		\$1.00	BAMBORA_PAYWITHCARD_ERROR (141) Category 1, Code: 7, PaymentRequired, category: 1, code: 7: DE		
1,053	2024-10-30 10:48:37AM	QA Test (9901)	8081	123	Moneris (1)	Visa	\$1.00	PROCESSED (6) 1440-0_941_027, APPROVED	*	=, T34414
1,054	2024-10-30 11:04:33AM	QA Test (9901)	8111	123	Moneris (1)	Visa	\$1.00	PROCESSED (6) 1442-0_941_027, APPROVED	*	=, T33346
1,055	2024-10-30 11:08:14AM	QA Test (9901)	8141	123	Moneris (1)	Visa	\$1.00	PROCESSED (6) 1444-0_941_027, APPROVED	*	=, T34210
1,056	2024-10-30 11:12:03AM	QA Test (9901)	8171	123	Moneris (1)	Visa	\$1.00	PROCESSED (6) 1446-0_941_027, APPROVED	*	=, T37795
1,057	2024-10-30 11:28:09AM	QA Test (9901)	8201	123	Bambora (2)		\$1.00	BAMBORA_PAYWITHTOKEN_ERROR (111) Category 1, Code: 7, PaymentRequired, category: 1, code: 7: DE		
1,058	2024-10-30 11:30:39AM	Global Admin (9999)	8231	Leo Test	Bambora (2)	Visa	\$1.00	PROCESSED (6) 10000023, 1, Approved, TEST		
1,059	2024-10-30 11:33:41AM	QA Test (9901)	8261	123	Bambora (2)	Visa	\$1.00	PROCESSED (6) 10000024, 1, Approved, TEST		
1,060	2024-10-30 11:38:05AM	Global Admin (9999)	8291	123	Bambora (2)		\$1.00	BAMBORA_PAYWITHTOKEN_ERROR (111) Category 2, Code: 16, PaymentRequired, category: 2, code: 16: DE		
1,061	2024-10-30 11:40:44AM	Global Admin (9999)	8321	12345	Bambora (2)	Visa	\$5.00	PROCESSED (6) 10000026, 1, Approved, TEST		
1,062	2024-10-30 11:43:45AM	Global Admin (9999)	8351	123456	Bambora (2)	Visa	\$3.00	PROCESSED (6) 10000027, 1, Approved, TEST		
1,063	2024-10-30 11:46:35AM	Global Admin (9999)	8381	11111	Bambora (2)	Visa	\$4.00	PROCESSED (6) 10000028, 1, Approved, TEST		

Report Summary

The “icePay Transaction Report” provides detailed information on every icePay transaction (successes and failures).

Report Parameters

Before generating the report, choose the appropriate parameters. The table below describes the parameters for the report:

icePay Transaction Report	
Parameter	Description
Start Date	Specify the start date for the report.
End Date	Specify the end date for the report.
Which User(s)?	Specify the user or range of users for the report.
Which Card type (Put 0 for all card types)?	Specify the card type. Select 0 for all card types.

Report Description

The information displayed for each transaction is described in the table below:

icePay Transaction Report Details	
Column	Description
ID	The ID of the transaction.
Date Time	The date and time that the transaction occurred. The following format is used: MM/DD/YYYY HH:MM:SS.
Agent	The handling agent's username and ID.
Contact ID	The contact ID of the original contact associated with the transaction.
Order Number	The number provided by the agent to associate the order with the icePay transaction.
Store	The name and ID number of the store.
Card Type	The card provider. Supported processors include: • Visa • Mastercard • Amex
Amount	The amount processed by icePay.
Process	The type of icePay transaction.
Status	Status code returned by icePay. For the full list of status codes, refer to Appendix A: Status Codes.
Store Result	Result returned by the provider.

icePay Summary Report by Card Provider

icePay Summary Report By Card Provider					
From 2024-05-11 12:00:00AM to 2024-11-07 11:59:59PM					
Card Type	Number Sales	Number Returns	Total Sales	Total Returns	Net Amount
MasterCard	11	0	\$99.35	\$0.00	\$99.35
Visa	22	0	\$86.48	\$0.00	\$86.48
Grand Total	33	0	\$185.83	\$0.00	\$185.83

Report Summary

The "icePay Summary Report by Card Provider" provides summarized information on the number of successful and complete transactions and refunds that have occurred, by card provider.

Report Parameters

Before generating the report, choose the appropriate parameters. The table below describes the parameters for the report:

icePay Summary Report by Card Provider Parameters	
Parameter	Description
Start Date	Specify the start date for the report.
End Date	Specify the end date for the report.

Report Description

The information displayed for each card provider is described in the table below:

icePay Summary Report by Card Provider Details	
Column	Description
Card Type	The card provider. Supported processors include: • Visa • Mastercard • Amex
Number Sales	The total number of successful and complete transactions.
Number Returns	The total number of successful and complete returns.
Total Sales	The sum of all successful and complete transactions in dollars.
Total Returns	The sum of all successful and complete returns in dollars.
Net Amount	The net amount calculated by subtracting the <i>Total Returns</i> from the <i>Total Sales</i> in dollars.

icePay Summary Report by User

icePay Summary Report By User						
From 2024-05-11 12:00:00AM to 2024-11-07 11:59:59PM						
Agent Name		Number Sales	Number Returns	Total Sales	Total Returns	Net Amount
1000 Training						
	Visa	3	0	\$40.48	\$0.00	\$40.48
9901 QA Test						
	MasterCard	8	0	\$53.35	\$0.00	\$53.35
	Unknown (null)	0	0	\$0.00	\$0.00	\$0.00
	Visa	9	0	\$27.00	\$0.00	\$27.00
9997 ice Admin						
	MasterCard	1	0	\$44.00	\$0.00	\$44.00
	Visa	0	0	\$0.00	\$0.00	\$0.00
9998 Switch Admin						
	MasterCard	1	0	\$1.00	\$0.00	\$1.00
9999 Global Admin						
	MasterCard	1	0	\$1.00	\$0.00	\$1.00
	Visa	10	0	\$19.00	\$0.00	\$19.00
Grand Total		33	0	\$185.83	\$0.00	\$185.83

Report Summary

The "icePay Summary Report by User" provides summarized information on the number of successful and complete transactions and refunds that have occurred, grouped by users, and card provider.

Report Parameters

Before generating the report, choose the appropriate parameters. The table below describes the parameters for the report:

icePay Summary Report by User Parameters	
Parameter	Description
Start Date	Specify the start date for the report.
End Date	Specify the end date for the report.
Which User(s)?	Specify the user or range of users for the report.

icePay Summary Report by User Parameters	
Parameter	Description
Which Card type (Put 0 for all card types)?	Specify the card type. Select 0 for all card types.

Report Description

The information displayed for each user and card type is described in the table below:

icePay Summary Report by User Details	
Column	Description
Agent Name	The name and user ID of the handling agent.
Card Type	The card provider. Supported processors include: • Visa • Mastercard • Amex
Number Sales	The total number of successful and complete transactions.
Number Returns	The total number of successful and complete returns.
Total Sales	The sum of all successful and complete transactions in dollars.
Total Returns	The sum of all successful and complete returns in dollars.
Net Amount	The net amount calculated by subtracting the <i>Total Returns</i> from the <i>Total Sales</i> in dollars.

icePay Raw Data Report

icePay Raw Data Report								
From 2024-11-02 12:00:00AM to 2024-11-07 11:59:59PM								
TransactionId	Formatted DateTime	OrderNumber	Amount	OriginalContactId	ConsultContactId	ConferenceContactId	Language	CustomerName
1064	2024-11-05 8:55:33PM UTC	1551	\$0.00	8421	8431	8441	en	Christina
1065	2024-11-07 4:45:19PM UTC	133	\$13.50	8451	8461	8471	en	John P

CustomerEmail	Status	MaskedPAN	ExpiryDate	CardType	Token	AuthorizationCode	StoreResultCode
	MONERIS_GETTOKEN_EXCEPTION (163)	*****4242	1029				null
	PROCESSED (6)	*****1234	1025	Visa	c55-851476c8-843d-447b-84fb-<	TEST	1

StoreResultDescription	StoreTransactionId	Custom	Miscellaneous
The underlying connection was closed: An unexpected error occurred		{}	("IssuerID": "024110515564526")
Approved	10000031	("5": "L3T 7Z3", "6": "John P")	{}

Report Summary

The “icePay Raw Data Report” provides detailed information on all transactions in icePay displaying the data from all columns in the icePay database.

Note: For information on how to export the report to XML, please refer to the *iceReporting User Manual*.

Report Parameters

Before generating the report, choose the appropriate parameters. The table below describes the parameters for the report:

icePay Raw Data Report Parameters	
Parameter	Description
Start Date	Specify the start date for the report.
End Date	Specify the end date for the report.
Which User(s)?	Specify the user or range of users for the report.

icePay Raw Data Report Parameters	
Parameter	Description
Which Card type (Put 0 for all card types)?	Specify the card type. Select 0 for all card types.

Report Description

The information displayed for each transaction is described in the table below:

icePay Raw Data Report Details	
Column	Description
ID	The unique ID assigned to each transaction in icePay.
Date Time	The date and time that the event occurred. The following format is used: MM/DD/YYYY HH:MM:SS (AM or PM). Information for each event is displayed in the columns described below.
AgentName	The name of the handling agent.
Order Number	The number provided by the agent to associate the order with the icePay transaction.
Store Name	The name of the store.
Amount	The amount processed by icePay.
Status Code	Status code returned by icePay. For the full list of status codes, refer to Appendix A: Status Codes.
Original Contact ID	The contact ID of the original contact associated with the transaction.
Consult Contact ID	The contact ID of the consulting call used to consult icePay.

icePay Raw Data Report Details	
Column	Description
Conference Contact ID	The contact ID of the conference call with icePay.
Language	The language of the icePay audio messages.
Customer Name	The name of the customer provided by the agent.
Customer Email	The email of the customer provided by the agent.
Process	The type of icePay transaction.
Masked PAN	Masked credit card number.
Expiry Date	The expiry date of the credit card.
Card Type	The card provider. Supported processors include: • Visa • Mastercard • Amex
Token	The token returned by the payment authorizer of the credit card information.
Authorization Code	The code returned by the payment authorizer.
Store Result Code	The code returned by the payment authorizer when <i>process payment</i> is enabled.
Store Result Description	The description of the payment result code.
Store Transaction ID	ID returned by the payment authorizer when <i>process payment</i> is enabled.
Custom	The values provided by the agent in the icePay custom fields.



Appendix A: Status Codes

The following table lists the status codes returned by icePay:

Code	Name	DisplayName	Description (en-CA)
0	UNKNOWN	Unknown	Status Unknown
1	CREATED	Created	Transaction Created
2	IN_PROGRESS	In Progress	Card Collection In Progress
3	CANCELLED	Cancelled	Card Collection Cancelled by Agent
4	COLLECTED	Collected	Card Collection Complete
5	TOKENIZED	Tokenized	Card Information Tokenized by Provider
6	PROCESSED	Processed	Payment Processed by Provider
11	REFUND_CREATED	Refund Created	Refund transaction created
12	REFUND_PARTIAL	Refund Partial	Partial refund complete
13	REFUND_FULL	Refund Full	Full refund complete
50	TIMEOUT	Timeout	Timeout
51	FAIL_PAN_ENTRY	Fail Pan Entry	icePay client issue while entering PAN
52	FAIL_EXP_ENTRY	Fail Exp Entry	icePay client issue while entering Expiry Date
53	FAIL_CVV_ENTRY	Fail Cvv Entry	icePay client issue while entering CVV

60	PAYMENTPROCESSOR_TIME_OUT	Payment Processor Time Out	icePay server issue. Please contact ComputerTalk.
61	PAYMENTPROCESSOR_FAIL	Payment Processor Fail	icePay server issue. Please contact ComputerTalk.
70	CUSTOMER_HANG_UP	Customer Hang Up	Customer hung up the call
71	AGENT_HANG_UP	Agent Hang Up	Agent hung up the call
72	CVV_AUTH_FAIL	Cvv Auth Fail	CVV not authenticated
73	EXP_DATE_FAIL	Exp Date Fail	Expiry Date not authenticated
97	FUNCTION_NOT_IMPLEMENTED	Function Not Implemented	Function not implemented
98	NO_RECORD_FOUND	No Record Found	No record found.
99	WEBSERVICE_FAILURE	Webservice Failure	icePay server issue. Please contact ComputerTalk.
100	BAMBORA_GETTOKEN_SUCCESS	Bambora GetToken Success	Successfully got token for Bambora.
101	BAMBORA_GETTOKEN_ERROR	Bambora GetToken Error	Error occurred when getting token from Bambora
102	BAMBORA_GETTOKEN_EXCEPTION	Bambora GetToken Exception	Exception occurred when getting token from Bambora
110	BAMBORA_PAYWITHTOKEN_SUCCESS	Bambora PayWithToken Success	Successfully paid with token to Bambora
111	BAMBORA_PAYWITHTOKEN_ERROR	Bambora PayWithToken Error	Error occurred when paying with token to Bambora
112	BAMBORA_PAYWITHTOKEN_EXCEPTION	Bambora PayWithToken Exception	Exception occurred when paying with token to Bambora
120	BAMBORA_CHECKPURCHASE_SUCCESS	Bambora CheckPurchase Success	Successfully found purchase from Bambora.
121	BAMBORA_CHECKPURCHASE_ERROR	Bambora CheckPurchase Error	Error occurred when finding purchase from Bambora.
122	BAMBORA_CHECKPURCHASE_EXCEPTION	Bambora CheckPurchase Exception	Exception occurred when finding purchase from Bambora.
130	BAMBORA_REFUNDPURCHASE_SUCCESS	Bambora RefundPurchase Success	Successfully submitted refund to Bambora.

131	BAMBORA_REFUNDPURCHASE_ERROR	Bambora RefundPurchase Error	Error occurred when submitting refund to Bambora.
132	BAMBORA_REFUNDPURCHASE_EXCEPTION	Bambora RefundPurchase Exception	Exception occurred when submitting refund to Bambora.
140	BAMBORA_PAYWITHCARD_SUCCESS	Bambora PayWithCard Success	Successfully paid with card to Bambora.
141	BAMBORA_PAYWITHCARD_ERROR	Bambora PayWithCard Error	Error occurred when paying with card to Bambora.
142	BAMBORA_PAYWITHCARD_EXCEPTION	Bambora PayWithCard Exception	Exception occurred when paying with card to Bambora.
150	MONERIS_VALIDATECARD_SUCCESS	Moneris ValidateCard Success	Successfully validated card with Moneris.
151	MONERIS_VALIDATECARD_INVALID_CVV	Moneris ValidateCard Invalid Cvv	Invalid CVV occurred when validating card with Moneris.
152	MONERIS_VALIDATECARD_TIMEOUT	Moneris ValidateCard Timeout	Timeout occurred when validating card with Moneris.
153	MONERIS_VALIDATECARD_ERROR	Moneris ValidateCard Error	Error occurred when validating card with Moneris.
154	MONERIS_VALIDATECARD_EXCEPTION	Moneris ValidateCard Exception	Exception occurred when validating card with Moneris.
160	MONERIS_GETTOKEN_SUCCESS	Moneris GetToken Success	Successfully got token from Moneris.
161	MONERIS_GETTOKEN_TIMEOUT	Moneris GetToken Timeout	Timeout occurred when getting token from Moneris.
162	MONERIS_GETTOKEN_ERROR	Moneris GetToken Error	Error occurred when getting token from Moneris.
163	MONERIS_GETTOKEN_EXCEPTION	Moneris GetToken Exception	Exception occurred when getting token from Moneris.
170	MONERIS_PAYWITHTOKEN_SUCCESS	Moneris PayWithToken Success	Successfully paid with token to Moneris.
171	MONERIS_PAYWITHTOKEN_TIMEOUT	Moneris PayWithToken Timeout	Timeout occurred when paying with token to Moneris.

172	MONERIS_PAYWITHTOKEN_ERROR	Moneris PayWithToken Error	Error occurred when paying with token to Moneris.
173	MONERIS_PAYWITHTOKEN_EXCEPTION	Moneris PayWithToken Exception	Exception occurred when paying with token to Moneris.
180	MONERIS_REFUNDPURCHASE_SUCCESS	Moneris RefundPurchase Success	Successfully submitted refund to Moneris.
181	MONERIS_REFUNDPURCHASE_TIMEOUT	Moneris RefundPurchase Timeout	Timeout occurred when submitting refund to Moneris.
182	MONERIS_REFUNDPURCHASE_ERROR	Moneris RefundPurchase Error	Error occurred when submitting refund to Moneris.
183	MONERIS_REFUNDPURCHASE_EXCEPTION	Moneris RefundPurchase Exception	Exception occurred when submitting refund to Moneris.
190	MONERIS_PAYWITHCARD_SUCCESS	Moneris PayWithCard Success	Successfully paid with card to Moneris.
191	MONERIS_PAYWITHCARD_TIMEOUT	Moneris PayWithCard Timeout	Timeout occurred when paying with card to Moneris.
192	MONERIS_PAYWITHCARD_ERROR	Moneris PayWithCard Error	Error occurred when paying with card to Moneris.
193	MONERIS_PAYWITHCARD_EXCEPTION	Moneris PayWithCard Exception	Exception occurred when paying with card to Moneris.
301	EXACTPAYMENTS_PAYWITHCARD_SUCCESS	eXact Payments PayWithCardSuccess	Successfully sent payment to eXact Payments.
302	EXACTPAYMENTS_PAYWITHCARD_ERROR	eXact Payments PayWithCard Error	Error occurred when getting token from eXact Payments.
303	EXACTPAYMENTS_PAYWITHCARD_WEBEXCEPTION	eXact Payments PayWithCard Webexception	Web Exception occurred when getting token from eXact Payments.
304	EXACTPAYMENTS_PAYWITHCARD_WEBEXCEPTION_NODESC	eXact Payments PaywithCard Webexception Nodeesc	Web Exception with no description occurred when getting token from eXact Payments.
305	EXACTPAYMENTS_PAYWITHCARD_EXCEPTION	eXact Payments PayWithCard Exception	Exception occurred when sending payment to eXact Payments.

350	TRUSTCOMMERCE_PAYWITHCARD_SUCCESS	TrustCommerce PayWithCard Error	Successfully sent payment to TrustCommerce.
351	TRUSTCOMMERCE_PAYWITHCARD_ERROR	TrustCommerce PayWithCard Error	Error occurred when paying with card to TrustCommerce.
352	TRUSTCOMMERCE_PAYWITHCARD_WEBEXCEPTION	TrustCommerce PayWithCard Webexception	Web Exception occurred when paying with card to TrustCommerce.
353	TRUSTCOMMERCE_PAYWITHCARD_EXCEPTION	TrustCommerce PayWithCard Exception	Exception occurred when sending payment to TrustCommerce.



Appendix B: Activity Codes

The following table lists the activity codes by icePay:

Code	Name	DisplayName	Description (en-CA)
0	UNKNOWN	Unknown	Unknown activity occurred.
100	UPDATE_STATUS	Update Status	icePay status code updated.
1000	PLUGIN	Plugin	Plugin reached.
1001	PLUGIN_STORES_SAVE	Plugin Stores Save	User saved stores.
1002	PLUGIN_SETTINGS_SAVE	Plugin Settings Save	User saved settings.
1003	PLUGIN_CUSTOMFIELDS_SAVE	Plugin Custom Fields Save	User saved custom fields.
1050	PLUGIN_APIKEY_CREATE	Plugin API Key Create	User created new API key.
1051	PLUGIN_APIKEY_ENABLE	Plugin API Key Enable	User enabled API key.
1052	PLUGIN_APIKEY_DISABLE	Plugin API Key Disable	User disabled API key.
1100	PLUGIN_TRANSACTIONS_VIEWTOKEN	Plugin Transactions View Token	User viewed token for transaction.

1101	PLUGIN_TRANSACTIONS_UPDATETRANSACTION	Plugin Update Transaction	User updated field values for transaction.
1200	PLUGIN_CALLERHANGUP	Plugin Caller Hangup	Caller hung up call detected from plugin.
1201	PLUGIN_AGENTHANGUP	Plugin Agent Hangup	Agent hung up call detected from plugin.
1202	PLUGIN_CONSULTSETUP	Plugin Consult Setup	Setup consult from plugin.
2000	WORKFLOW	Workflow	Workflow reached.
2001	WORKFLOW_START	Workflow Start	Workflow start routine reached.
2010	WORKFLOW_INITIALIZE	Workflow Initialize	Workflow initialize routine reached.
2020	WORKFLOW_SETUP	Workflow Setup	Workflow setup routine reached.
2021	WORKFLOW_SETUP_PAUSERECORDING_SUCCESS	Workflow Setup Pause Recording Success	Successfully paused recording.
2022	WORKFLOW_SETUP_PAUSERECORDING_FAILED	Workflow Setup Pause Recording Failed	Failed to pause recording.
2023	WORKFLOW_SETUP_CONFERENCE_SUCCESS	Workflow Setup Conference Success	Successfully connected conference.
2024	WORKFLOW_SETUP_CONFERENCE_FAILED	Workflow Setup Conference Failed	Failed to connect conference
2030	WORKFLOW_COLLECT	Workflow Collect	Workflow collect routine reached.
2031	WORKFLOW_COLLECT_CREATETRANSACTION_SUCCESS	Workflow Collect Create Transaction Success	Successfully created transaction.
2032	WORKFLOW_COLLECT_CREATETRANSACTION_FAILED	Workflow Collect Create Transaction Failed	Failed to create transaction.

2033	WORKFLOW_COLLECT_CREATETRANSACTION_ERROR	Workflow Collect Create Transaction Error	Error occurred when creating transaction.
2034	WORKFLOW_COLLECT_GETTRANSACTIONDETAILS_SUCCESS	Workflow Collect Get Transaction Details Success	Successfully transaction details.
2035	WORKFLOW_COLLECT_GETTRANSACTIONDETAILS_FAILED	Workflow Collect Get Transaction Details Error	Failed to get transaction details.
2036	WORKFLOW_COLLECT_GETTRANSACTIONDETAILS_ERROR	Workflow Collect Get Transaction Details Error	Error occurred when getting transaction details.
2037	WORKFLOW_COLLECT_UPDATESTATUS	Workflow Collect Update Status	Updating transaction with status code.
2040	WORKFLOW_COLLECT_PAN	Workflow Collect PAN	Collect PAN page reached.
2041	WORKFLOW_COLLECT_PAN_SUCCESS	Workflow Collect PAN Success	Successfully collected PAN.
2042	WORKFLOW_COLLECT_PAN_INVALID	Workflow Collect PAN Invalid	Invalid entry for PAN.
2043	WORKFLOW_COLLECT_PAN_TIMEOUT	Workflow Collect PAN Timeout	Timeout when entering PAN.
2044	WORKFLOW_COLLECT_PAN_TOOSHORT	Workflow Collect PAN Too Short	PAN entered was too short.
2045	WORKFLOW_COLLECT_PAN_TOOLONG	Workflow Collect PAN Too Long	PAN entered was too long.
2046	WORKFLOW_COLLECT_PAN_MOD10FAILED	Workflow Collect PAN Mod10 Failed	Mod10 Check on PAN failed.
2047	WORKFLOW_COLLECT_PAN_STARTOVER	Workflow Collect PAN Start Over	Start over selected when collecting PAN.
2048	WORKFLOW_COLLECT_PAN_MAXERROR	Workflow Collect PAN Max Error	Max errors reached when collecting PAN.
2050	WORKFLOW_COLLECT_EXP	Workflow Collect EXP	Collect EXP page reached.
2051	WORKFLOW_COLLECT_EXP_SUCCESS	Workflow Collect EXP Success	Successfully collected expiry date.
2052	WORKFLOW_COLLECT_EXP_INVALID	Workflow Collect EXP Invalid	Invalid entry for expiry date.

2053	WORKFLOW_COLLECT_EXP_TIMEOUT	Workflow Collect EXP Timeout	Timeout when entering expiry date.
2054	WORKFLOW_COLLECT_EXP_BADLENGTH	Workflow Collect EXP Bad Length	Bad length for EXP entered.
2055	WORKFLOW_COLLECT_EXP_BADDATE	Workflow Collect EXP Bad Date	Bad date for EXP entered.
2056	WORKFLOW_COLLECT_EXP_STARTOVER	Workflow Collect EXP Start Over	Start over selected when collecting expiry date.
2057	WORKFLOW_COLLECT_EXP_MAXERROR	Workflow Collect EXP Max Error	Max errors reached when collecting expiry date.
2060	WORKFLOW_COLLECT_CVV	Workflow Collect CVV	Collect CVV page reached.
2061	WORKFLOW_COLLECT_CVV_SUCCESS	Workflow Collect CVV Success	Successfully collected CVV.
2062	WORKFLOW_COLLECT_CVV_INVALID	Workflow Collect CVV Invalid	Invalid CVV entered.
2063	WORKFLOW_COLLECT_CVV_TIMEOUT	Workflow Collect CVV Timeout	Timeout when entering CVV.
2064	WORKFLOW_COLLECT_CVV_BADLENGTH	Workflow Collect CVV Bad Length	Bad length for CVV entered.
2065	WORKFLOW_COLLECT_CVV_HELP	Workflow Collect CVV Help	CVV help selected.
2066	WORKFLOW_COLLECT_CVV_STARTOVER	Workflow Collect CVV Start Over	Start over selected when entering CVV.
2067	WORKFLOW_COLLECT_CVV_MAXERROR	Workflow Collect CVV Max Error	Max errors reached when collecting CVV.
2070	WORKFLOW_COLLECT_SENDCARDINFO	Workflow Collect SendCardInfo	Sending card info.
2071	WORKFLOW_COLLECT_SENDCARDINFO_SUCCESS	Workflow Collect SendCardInfo Success	Successfully sent card info.
2072	WORKFLOW_COLLECT_SENDCARDINFO_FAILED	Workflow Collect SendCardInfo Failed	Failed to send card info.
2073	WORKFLOW_COLLECT_SENDCARDINFO_ERROR	Workflow Collect SendCardInfo Error	Error occurred when sending card info.

2080	WORKFLOW_WRAPUP	Workflow Wrap Up	Workflow wrap up routine reached.
2081	WORKFLOW_WRAPUP_RESUMERECORDING_SUCCESS	Workflow Wrap Up Resume Recording Success	Successfully resumed recording.
2082	WORKFLOW_WRAPUP_RESUMERECORDING_FAILED	Workflow Wrap Up Resume Recording Failed	Failed to resume recording.
2083	WORKFLOW_WRAPUP_ENDCONSULT_SUCCESS	Workflow Wrap Up EndConsult Success	Successfully ended consult.
2084	WORKFLOW_WRAPUP_ENDCONSULT_FAILED	Workflow Wrap Up EndConsult Failed	Failed to end consult.
2085	WORKFLOW_WRAPUP_AGENTSTATENOTCONFERENCE	Workflow Wrap Up Agent State Not Conference	Agent is not currently in conference state.
2100	WORKFLOW_STANDALONE	Workflow Standalone	Workflow standalone routine reached.
2200	WORKFLOW_ADMINISTRATION	Workflow Administration	Workflow Administration
3000	ICEPAY_WEBSERVICE	icePay Web Service	icePay Web Service reached.
3010	ICEPAY_WEBSERVICE_GETTOKEN	icePay Web Service GetToken	GetToken reached.
3011	ICEPAY_WEBSERVICE_GETTOKEN_SUCCESS	icePay Web Service GetToken Success	Successfullyt token.
3012	ICEPAY_WEBSERVICE_GETTOKEN_ERROR	icePay Web Service GetToken Error	Error occurred when getting token.
3013	ICEPAY_WEBSERVICE_GETTOKEN_NOTIMPLEMENTED	icePay Web Service GetToken Not Implemented	Get token is not implemented for this payment provider.

3014	ICEPAY_WEBSERVICE_GETTOKEN_UPDATEFAILED	icePay Web Service GetToken Update Failed	Failed to update transaction with get token result.
3020	ICEPAY_WEBSERVICE_PAYWITHTOKEN	icePay Web Service PayWithToken	PayWithToken reached.
3021	ICEPAY_WEBSERVICE_PAYWITHTOKEN_SUCCESS	icePay Web Service PayWithToken Success	Successfully paid with token.
3022	ICEPAY_WEBSERVICE_PAYWITHTOKEN_ERROR	icePay Web Service PayWithToken Error	Error occurred when paying with token.
3023	ICEPAY_WEBSERVICE_PAYWITHTOKEN_NOTIMPLEMENTED	icePay Web Service PayWithToken Not Implemented	Pay with token is not implemented for this payment provider.
3024	ICEPAY_WEBSERVICE_PAYWITHTOKEN_UPDATEFAILED	icePay Web Service PayWithToken Update Failed	Failed to update transaction with pay with token result.
3030	ICEPAY_WEBSERVICE_PAYWITHCARD	icePay Web Service PayWithCard	PayWithCard reached.
3031	ICEPAY_WEBSERVICE_PAYWITHCARD_SUCCESS	icePay Web Service PayWithCard Success	Successfully paid with card.
3032	ICEPAY_WEBSERVICE_PAYWITHCARD_ERROR	icePay Web Service PayWithCard Error	Error occurred when paying with card.
3033	ICEPAY_WEBSERVICE_PAYWITHCARD_NOTIMPLEMENTED	icePay Web Service PayWithCard Not Implemented	Pay with card is not implemented for this payment provider.
3034	ICEPAY_WEBSERVICE_PAYWITHCARD_UPDATEFAILED	icePay Web Service	Failed to update transaction with

		PayWithCard Update Failed	pay wih card result.
4000	ICEPAYMENT_WEBSERVICE	icePayment Web Service	icePayment Web Service reached.
5000	CUSTOMER_GUI	Customer GUI	Customer GUI reached.



Appendix C: Agent States

The following table lists the agent states:

Code	Name
0	UNKNOWN
15	LOGGED_ON
25	LOGGED_OFF
35	READY
55	NOT_READY
65	WRAPUP
75	ALERTING
85	PLACING_CALL
95	INITIATING_CALL
105	ON_CALL
115	CONSULTING
125	IN_MEETING
135	TRANSFERRING_CALL
145	HOLDING_CALL
165	HELD
175	CONFERENCING
185	IN_WKFLOW
195	IN_PAQ
215	RECEIVING_FAST_BUSY
225	MONITORING
305	ON_EMAIL
306	ON_MULTI_EMAIL
315	ON_IM

316	ON_MULTI_IM
405	PICKING_RINGING_CALL
415	PICKING_HELD_CALL
425	PICKING_ACD_CALL
435	PICKING_PAQ_CALL
475	SWAPPING_PAQ_CALL
535	REROUTING_CALL
665	ON_NETWORK_CALL
675	COACHING



Appendix D: Payment Provider Field Options

The following links provide additional information about the Payment Provider Field Options for each Payment Provider.

TD Bambora

- <https://github.com/bambora-na/bambora-na-dotnet/blob/master/BamboraSDK/Requests/PaymentRequest.cs>
- <https://dev.na.bambora.com/docs/references/payment APIs/v1-0-5/>

Moneris

- <https://developer.moneris.com/Documentation/NA/E-Commerce%20Solutions/API/Card%20Verification?lang=dotnet>
- <https://developer.moneris.com/Documentation/NA/E-Commerce%20Solutions/API/Vault?lang=dotnet>
- <https://developer.moneris.com/Documentation/NA/E-Commerce%20Solutions/API/Purchase?lang=dotnet>

Note:

- Options with the *CardVerification* prefix are only allowed for the Tokenize and Tokenize and Pay processes.
- Options with the *ResAddCC* prefix are only allowed for the Tokenize (Permanent Token) and Pay processes.
- Options with the *ResTempAdd* prefix are only allowed for the Tokenize (Temporary Token) and Pay processes.
- Options with the *ResPurchaseCC* prefix are only allowed for the Tokenize and Pay process.
- Options with the *Purchase* prefix are only allowed for the Process Payment process.

Exact Payments

- <https://support.e-xact.com/support/solutions/articles/150000065331-transaction-processing-api-reference-guide>
 - This PDF guide can also be found in your eLearning Portal

TrustCommerce

- <https://docs.trustcommerce.com/1777da137/p/17028e-fields-list/t/83f323>
 - This page is password protected. Please contact TrustCommerce for the password.