



Adelante TonePay User Guide

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Overview

TonePay is our automated Interactive Voice Response (IVR) card processing system, which works by allowing your customers to make payments using their touch-tone phones. A '0330' local rate number is allocated to your company - this can be published as a standalone number and/ or attached to an existing call tree.

Where there is a requirement for staff to interact with the cardholder, our ConnectPay gateway includes a module that allows you to transfer customers into an automated telephone payment process for the actual card entry.

KEY BENEFITS

- A hosted solution, at a fraction of the cost of an in-house system.
- Out of scope for PCI DSS.
- Build your own 'call tree' by personalising scripts and voice prompts.
- An automated file with details of all card transactions, along with the relevant account codes, is generated daily.
- TonePay can be configured to validate account numbers, look up outstanding balances and read these out to card holders prior to payment.
- Card details are no longer handled by your staff, processed, stored, or transmitted on your network or recorded during telephone conversations.
- Payment information is available to your staff as soon as the payments are made.



TonePay

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TonePay

Getting Started

To log into your portal, go to <https://tonepay.adelante.co.uk> and enter your:

Username (your email address)

Password

On logging in, you should see the following options, bearing in mind you may not have access to all of them, depending on your user privileges:



Home Users Merchants Payments Calls Postings Stats Reports

- **Users:** to set up new users/ amend permissions.
- **Merchants:** to view your account set up.
- **Payments:** to view or search transactions processed through your TonePay system (you can also view and search for these transactions within ConnectPay), produce CSV reports and process refunds.
- **Calls:** to view or search all calls to your TonePay system and produce CSV reports
- **Postings:** to view transactions posted to your accounting system (if set up).
- **Stats:** to view a summary of number of payments and total value for a specific period.
- **Reports:** to produce CSV or PDF transaction reports.



Users

Use the **'Users'** tab to:

- *Search* for a user
- *Add* new users
- *Modify* existing users
- *Disable* users

Full Name	Email Address	Merchants
Demo User	demo@demo.co.uk	TonePay DEMO Line
Irina Woodford (1-2/2)	irinaw@gmail.com	TonePay DEMO Line

Buttons: EXCEL / CSV, Add New

Searching for a user

You can search for a user by using the dropdown boxes to select your criteria and then enter your search parameters in the adjacent box.

Using a * will bring up all records.

Editing a user

Click on the user to bring up the user set up screen.

Adding a new user

User

Full Name

Email Address

Access TonePay DEMO Line demo00

Admin

Disabled

Permissions Calls
 Postings
 Refunds

Password

Last Login



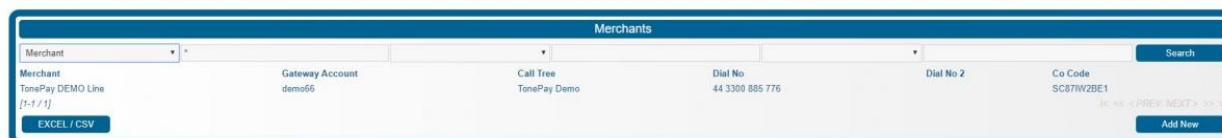
- Click **'Add New'**
- Enter **name**
- Enter **email address**
- **Access:** tick the box for the relevant companies the user is to have access to (if you only have one account, there will only be one option available).
- **Admin:** tick to give the user full admin access. This gives the user permission to view all tabs and to perform refunds. Leaving this option unticked gives the user access to Payments and Reports only (additional permissions can be given in the 'Permissions' section).
- **Disabled:** tick to disable a user's access.
- **Permissions:** tick to give a non-admin user permission to access these tabs or perform refunds.
- **Password:** you can enter a password here or you can leave blank. On clicking 'Save' you will then have the option to 'Email Password'. This will send a link to the user to create their own password.

(Passwords need to be at least 8 characters long and contain at least one Capital letter, one lower case letter, 1 number and a special character)

You can also use this option if an existing user has forgotten their password.

Merchants

The **'Merchants'** tab will give you an overview of the set up of your account(s). You should not need to use this screen, but if you require further information, please contact us on 01628 820500.



Merchant	Gateway Account	Call Tree	Dial No	Dial No 2	Co Code
TonePay DEMO Line [1-1 / 1]	demo66	TonePay Demo	44 3300 885 776		SC87WZBE1

EXCEL / CSV Add New



TonePay

Payments

To search and view your TonePay transactions, select **'Payments'**. You can use the drop-down boxes to select search criteria and then enter the parameters in the adjacent field. You can use one, two or three criteria to search. Entering a * will bring up all records. The payment date will default to today, but you can amend this to any date or date range.

Payments									
Payment Date	last week	Fund Code	Customer Ref 1	Status	Card No	Amount	Surcharge	Total	Search
Merchant	TPID	Payment Date	Fund Code	Customer Ref 1	Status	Card No	Amount	Surcharge	Total
TonePay DEMO Line	3803591	11/11/2019 12:55	1	555	Authorised	44*****1111	25.00	0.00	25.00
TonePay DEMO Line	3804038	11/11/2019 13:57	1	123	Authorised	44*****1111	25.00	0.00	25.00
TonePay DEMO Line	3804083	11/11/2019 14:04	1	123	Duplicate	44*****1111	25.00	0.00	25.00
TonePay DEMO Line	3804987	11/11/2019 15:03	1	328	Authorised	44*****1111	25.00	0.00	25.00
TonePay DEMO Line	3811267	12/11/2019 11:37	1	123	Authorised	44*****1111	25.00	0.00	25.00
TonePay DEMO Line	3812341	12/11/2019 14:18	1	569	Authorised	44*****1111	25.00	0.00	25.00
TonePay DEMO Line	3815316	13/11/2019 09:52	1	123	Authorised	44*****1111	25.00	0.00	25.00
TonePay DEMO Line	3818245	13/11/2019 17:36	1	123	Duplicate	44*****1111	25.00	0.00	25.00
TonePay DEMO Line	3819695	14/11/2019 09:25	1	756	Authorised	44*****1111	25.00	0.00	25.00
TonePay DEMO Line	3820188	14/11/2019 19:40	1	456	Authorised	44*****1111	25.00	0.00	25.00
TonePay DEMO Line	3824434	15/11/2019 09:17	1	647	Authorised	44*****1111	25.00	0.00	25.00
TonePay DEMO Line	3826969	15/11/2019 14:24	1	123	Authorised	44*****1111	25.00	0.00	25.00

From here, you can also download a CSV report of the transaction results.

Clicking on a specific transaction gives a more detailed view:

Payment

TPID:

Call ID:

Caller ID:

Refunded:

Merchant ID:

Merchant:

Source:

Payment Date:

Gateway Account:

Gateway Reference:

Status:

Auth Code:

MPOSID:

Card No:

Card Expiry:

Result:

Fund Code:

Amount*:

Surcharge*:

Total*:

Email Address:

Customer Ref 1:

Customer Ref 2:

Customer Ref 3:

Customer Ref 2:

Customer Ref 3:

Customer Ref 4:

Postcode:

Notes:



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Refunds

To process a refund, use the above search method to locate the transaction to be refunded. Click on the transaction and select the '**Refund**' option at the bottom of the screen (this will only be available if you have refund permission enabled).

Refund

Amount

OK
Cancel

You can refund all or part of the transaction by changing the amount, but you cannot refund *more* than the original transaction value. Selecting 'OK' processes the refund **immediately**.

Calls

On the '**Calls**' tab, you can see all the calls that have come into your line, the date and time, how long the call lasted and the status (transaction authorised, call abandoned etc.). On selecting the tab, you will be given a listing of today's calls by default. You can change the search by amending the date or by using the drop-down box and searching by another parameter.

Calls							Search
Call Date	Merchant	Call Date	Caller ID	Customer Ref 1	Duration	Status	
5549805	TonePay DEMO Line	15/11/2019 14:23:09	01782513000	123	1 minute	Authorised	
5545836	TonePay DEMO Line	15/11/2019 09:15:51	01189333553	647	2 minutes	Authorised	
5545825	TonePay DEMO Line	15/11/2019 09:14:22	07884395144		38 seconds	Abandoned	
5539827	TonePay DEMO Line	14/11/2019 10:39:13	07929633485	456	2 minutes	Authorised	
5539592	TonePay DEMO Line	14/11/2019 10:37:04	07929633485	456	1 minute	Abandoned	
5538855	TonePay DEMO Line	14/11/2019 09:25:01	01733264238	756	2 minutes	Authorised	
5538975	TonePay DEMO Line	13/11/2019 17:35:39	01793752600	123	1 minute	Duplicate	
5533443	TonePay DEMO Line	13/11/2019 11:45:42	01314494529		47 seconds	Abandoned	
5533439	TonePay DEMO Line	13/11/2019 11:45:11	01314494529		21 seconds	Abandoned	
5532158	TonePay DEMO Line	13/11/2019 09:51:29	07787963372	123	2 minutes	Authorised	
5527846	TonePay DEMO Line	12/11/2019 14:16:34	02089420729	569	2 minutes	Authorised	
5526122	TonePay DEMO Line	12/11/2019 11:36:17	07939638251	123	2 minutes	Authorised	

The most common statuses you will see are:

- **Pending:** call is still in progress
- **Abandoned:** the caller hung up before completing the call
- **Authorised:** a successful payment has been made
- **Declined:** the payment declined
- **Error:** there was an error whilst processing the payment

Clicking on a record will give you a detailed log for that call.



Postings

If we are posting your payments directly back into your system, you can see the individual postings on this tab. Only authorised transactions are posted.

The date will default to 'today', but you can amend this to a particular date or date range. You can refine the search further by using the drop down boxes to select another search parameter.

Stats

The **'Stats'** tab gives a snapshot of the number of transactions and the total value for a specified period.

Payment Stats

Merchant	TonePay DEMO Line demo66	▼	
Period	THIS WEEK	▼	
Payments	6		
Total	100.00		

Close

On clicking 'Stats', the information will be for 'Today' by default, but there are many other options to choose from, including a 'Custom' options where to/from dates can be entered.

Payment Stats

Merchant	TonePay DEMO Line demo66	▼	
Period	TODAY	▼	
Payments	TODAY		
Total			

- TODAY
- PAST 10 MINUTES
- PAST HOUR
- YESTERDAY
- THIS WEEK
- LAST WEEK
- THIS MONTH
- LAST MONTH
- THIS YEAR
- LAST YEAR
- CUSTOM

Close



TonePay

Reports

CSV reports can be downloaded from the **'Payments'** screen but you can also run reports under the **'Reports'** main menu option.

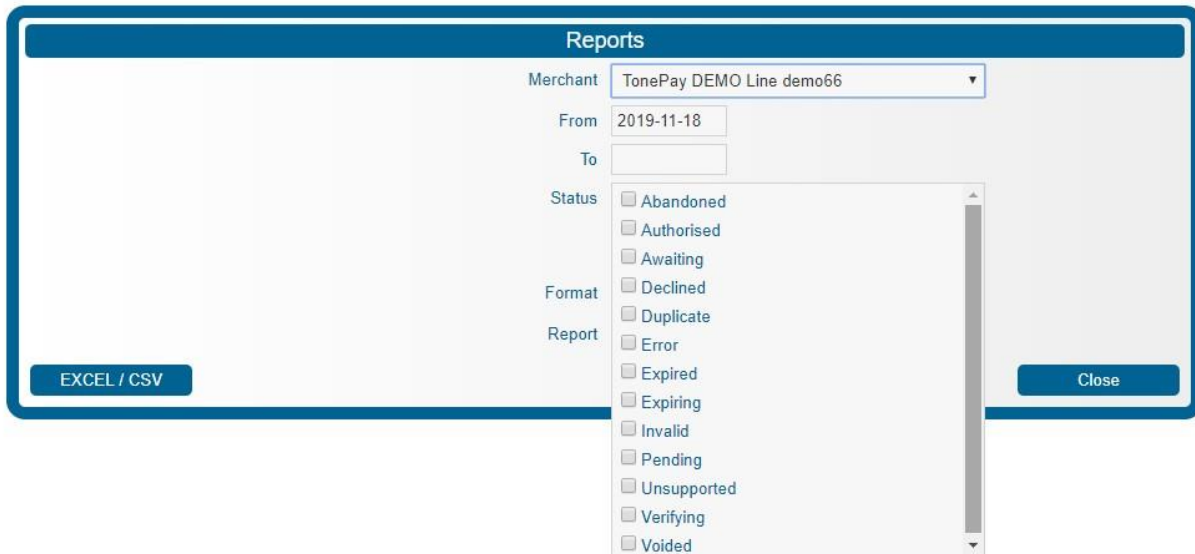


The screenshot shows the 'Reports' form with the following fields:

- Merchant: TonePay DEMO Line demo66
- From: 2019-11-18
- To: (empty)
- Status:
 - Abandoned
 - Authorised
 - Awaiting
- Format: EXCEL / CSV
- Report: Standard

Buttons: EXCEL / CSV, Close

- Enter a date or date range.
- Select the transaction statuses you wish to view; for example, you can select 'Authorised' payments only or tick all the boxes to run a report of all transactions.



The screenshot shows the 'Reports' form with the following fields:

- Merchant: TonePay DEMO Line demo66
- From: 2019-11-18
- To: (empty)
- Status:
 - Abandoned
 - Authorised
 - Awaiting
 - Declined
 - Duplicate
 - Error
 - Expired
 - Expiring
 - Invalid
 - Pending
 - Unsupported
 - Verifying
 - Voided
- Format: (empty)
- Report: (empty)

Buttons: EXCEL / CSV, Close



- Choose the format for the report (CSV or PDF).
- Chose the report you require. The differences between them are the columns you can view in each report. Not all are available as PDF view.
 - o **Standard** – this is an abbreviated report.
 - o **Full** – this report contains all fields (not available as PDF as it is too detailed/long).
 - o **Legacy reports** – these are available to customers who were on our previous TonePay portal, so should not be relevant.
- Once your options have been selected, click on the EXCEL/CSV or PDF tab (depending on which has been selected) to generate the report.

Here is an example of a 'Standard' report in both EXCEL/CSV and PDF formats:

	A	B	C	D	E	F	G	H
1	TPID	Fund Code	MPOSID	Payment Date	Customer Ref 1	Customer Ref 2	Status	Total
2	3761540	1	54955211	01/11/2019 12:11	521		Authorised	25
3	3762081	1	54957691	01/11/2019 13:08	123		Authorised	25
4								



TonePay Payments 01/11/2019

TPID	MPOSID	Payment Date	Fund Code	Customer Ref 1	Status	Total
3761540	54955211	01/11/2019 12:11	1	521	Authorised	25.00
3762081	54957691	01/11/2019 13:08	1	123	Authorised	25.00
						50.00