



User Guide



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Login

How to log in to PayGuard



Logging In

The INovation Platform


To use PayGuard, you will need to log in to Fusion's INovation platform through a web browser (or within your company's application if they have linked to PayGuard via iFrame).

Please follow this link:

<https://inovation.fusiontelecom.co/login/>

To log in, use your email address and the password provided. Make sure you are logged in at the start of the day, so that PayGuard is ready for when you need it and you don't need to log in whilst already on a call.


*Hint: After logging in for the first time, you can change your password by clicking the **Settings** button in the top right corner, and selecting profile.*



Email

Password

[Forgot password?](#)

 **Login To Account**



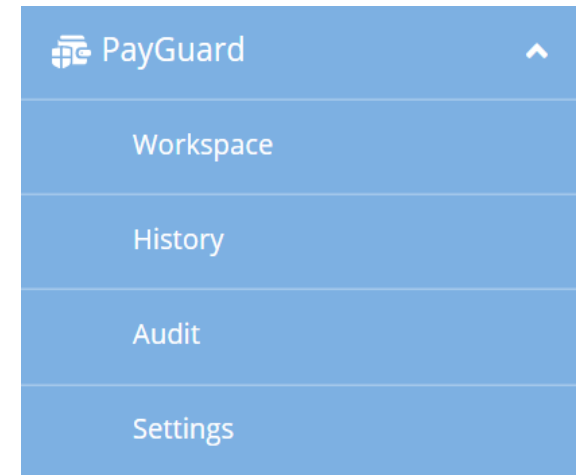
Logging In



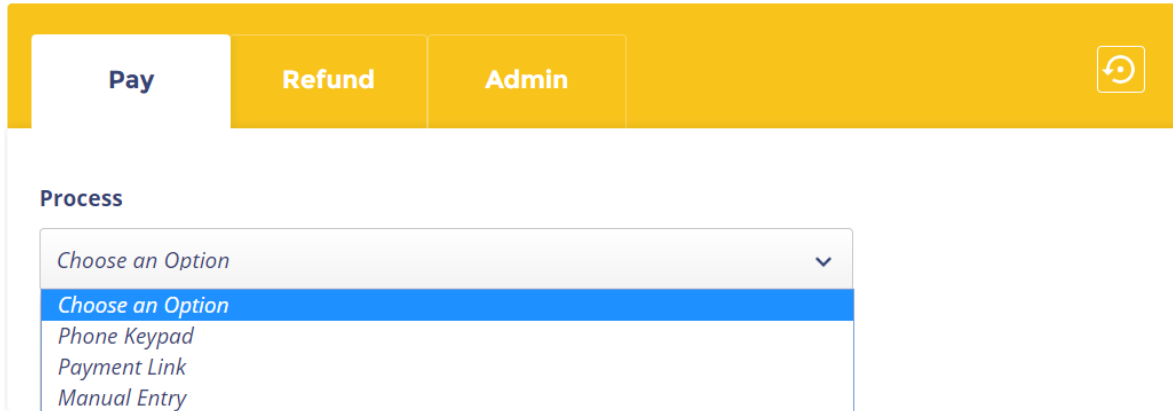
Once logged in, you will see the INovation dashboard. **Click on the PayGuard Icon**

You can also navigate here using the sidebar menu, by selecting

PayGuard -> Workspace



Workspace and Process Selection

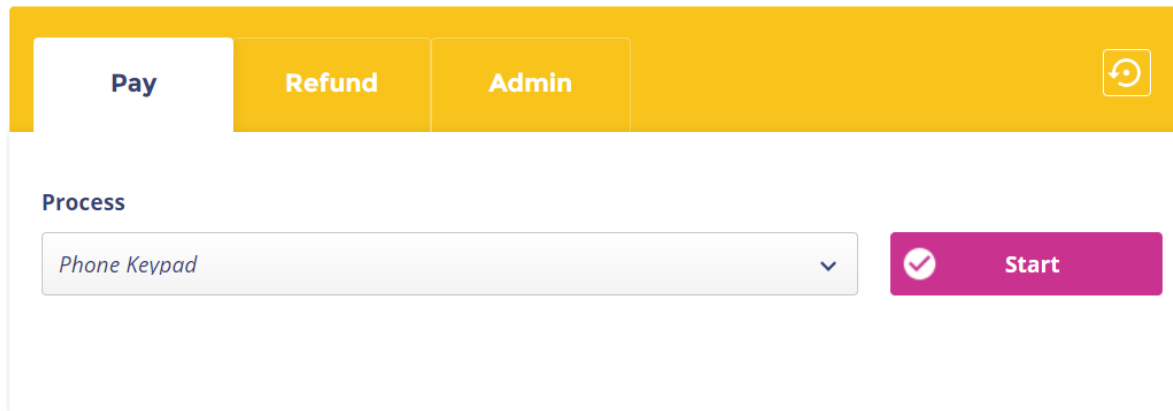


The screenshot shows a yellow header bar with three tabs: 'Pay', 'Refund', and 'Admin'. The 'Pay' tab is active. To the right of the tabs is a circular refresh icon. Below the header, the word 'Process' is displayed above a dropdown menu. The dropdown menu is open, showing four options: 'Choose an Option' (highlighted in blue), 'Phone Keypad', 'Payment Link', and 'Manual Entry'.

When you first land on the Workspace page, you will see the **Pay tab**.

First, you must select the **Process** through which you will be taking your customer's payment.

*Did You Know? If you only have one **Process** available to you, you will not need to select one.*



The screenshot shows the same yellow header bar with 'Pay', 'Refund', and 'Admin' tabs. The 'Pay' tab is active. Below the header, the word 'Process' is displayed above a dropdown menu. The dropdown menu is closed, and 'Phone Keypad' is selected. To the right of the dropdown menu is a pink 'Start' button with a white checkmark icon.

You can select the option you wish to use from the dropdown list.

Once you've chosen an option, click **Start** to continue.



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Phone Keypad

Customers type their card information using their phone keypad



Secure Line Callback

If you have not been told to call the customer back to take a payment, please skip to the next page.

When you are on the phone to your customer and you are ready to take a payment, you will need to call them back via PayGuard in order to take their card details.

Once you have selected the **Phone Keypad Process**, you will see this yellow screen.

Inform the customer that you are going to call them straight back on a secure payment line in order to process their payment.

Ask your customer to confirm the number they wish you to call and enter it into the **Call customer on** field. If you have multiple options, you can also select the caller ID number the customer will see on their phone with the **Number displayed to customer** menu.

When you're ready, you can end your call with the customer and then press the **Call** button to ring them back. Your phone will ring first. Answer it right away, and you will be able to hear ringing as we call the customer and connect them to you. Once they answer, you are ready to move on to the next step.

*Hint: If your direct dial number does not run through our network, you will see a number in the **Call me on** field that you might not recognise. It's important that you **leave this number as it is**, as it will be linked directly to your own and allow us to connect PayGuard to you.*

The screenshot shows the 'Secure Line Callback' interface. At the top, there are two tabs: 'Link' (selected) and 'Refund'. In the top right corner, it displays 'Agent PIN: 44' and a refresh icon. The main area is divided into two sections. On the left, there is a large yellow circle containing a white clock icon, with the text 'Awaiting Link...' below it. On the right, there are three input fields: 'Call customer on' with a placeholder 'Type in Caller no.' and a clipboard icon; 'Call me on' with the number '0333 443 9112' and a clipboard icon; and 'Number displayed to customer' with a dropdown menu showing 'Choose an Option' and a downward arrow. At the bottom right, there is a pink button with a white telephone handset icon and the text 'Call'.

Mid Call Transfer

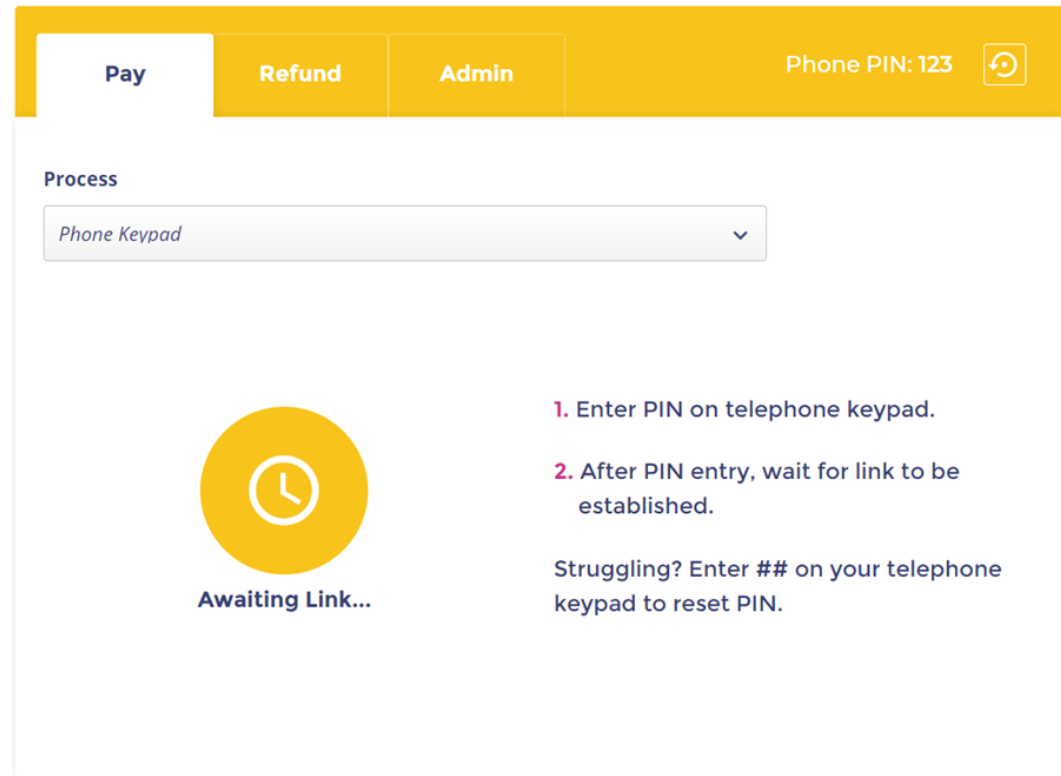
If you have not been told to transfer the customer to take a payment, please skip to the next page.

When you are on the phone to your customer and you are ready to take a payment, you will need to call them back via PayGuard in order to take their card details.

Once you have selected the **Phone Keypad Process**, you will see this yellow screen.

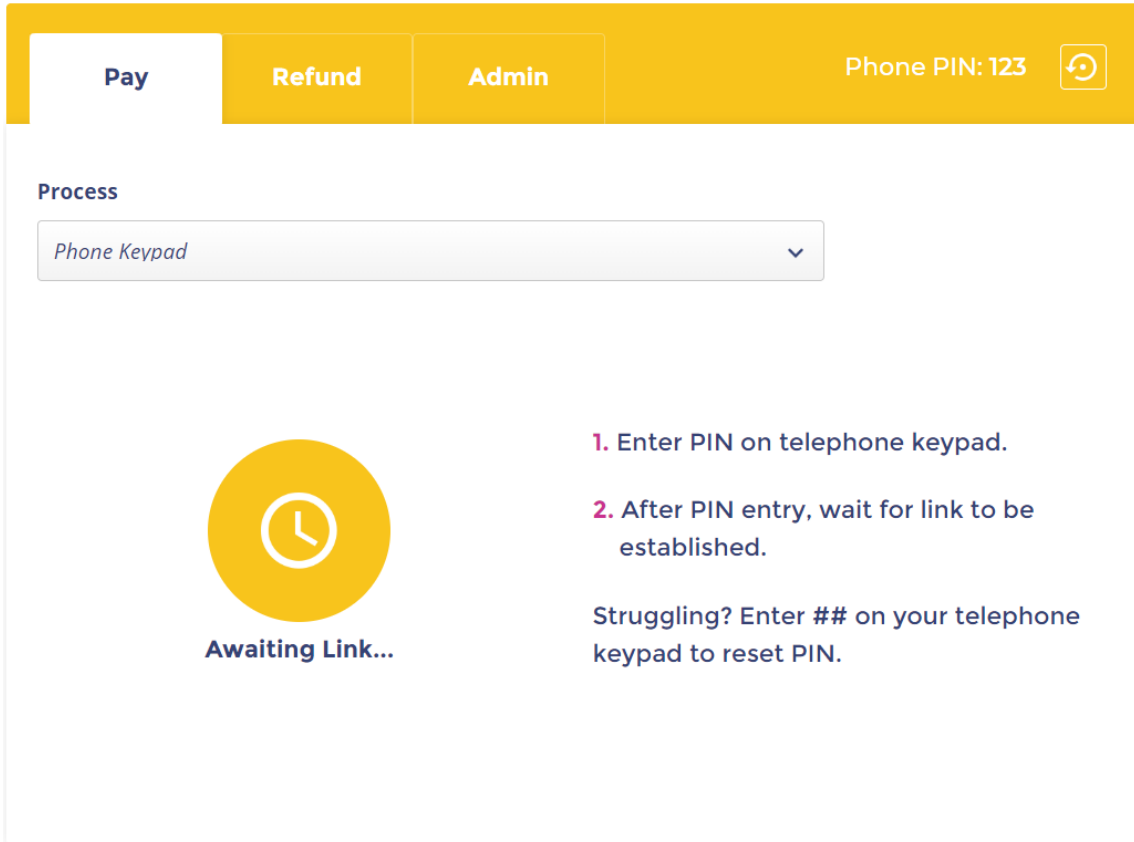
Inform the customer that you are going to call them straight back on a secure payment line in order to process their payment.

You must then blind transfer the customer to your assigned PayGuard number. You will then immediately receive a call back to your direct line via the PayGuard system, allowing you to continue the conversation.



Hint: Your phone system's administrator may have set up a quick dial code or speed dial button to allow you to transfer the customer without manually dialling. Please check with them for instructions that may be specific to you.

Phone Keypad Process



The screenshot shows the PayGuard interface with a yellow header. The header contains three tabs: 'Pay', 'Refund', and 'Admin'. To the right of the tabs, it displays 'Phone PIN: 123' and a refresh icon. Below the header, there is a 'Process' dropdown menu with 'Phone Keypad' selected. The main content area features a large yellow circle with a clock icon and the text 'Awaiting Link...'. To the right of this icon, there are two numbered steps: '1. Enter PIN on telephone keypad.' and '2. After PIN entry, wait for link to be established.' Below these steps, there is a note: 'Struggling? Enter ## on your telephone keypad to reset PIN.'

If you are able to take a payment without calling the customer back, when you open PayGuard, you will see this screen instead.

When you are on the phone to your customer and you are ready to take a payment, you will need to link your phone call with PayGuard. To do so, enter your **Agent PIN** into your telephone keypad.


In most cases, you should be able to find your Agent PIN in the top righthand corner of the yellow screen. Your PIN will always stay the same.

If you enter your agent PIN incorrectly, you must press ## in order to clear it before trying again.



Hint: If your customer has a menu on their phone number before you get through to them, for example, "Press 1 for Support," then you must reset the keypad before entering your PIN.




Press ## to clear any previous buttons pressed during the call and reset the PIN.

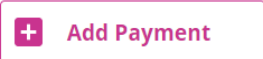
Phone Keypad Process

Pay Refund Admin 


Process

Phone Keypad   **Linked**

Currency	Amount	Date	Reference	Reoccur
£ 	Type...	 15/05/2020	Reference	No 

 **+ Add Payment**

Method

Choose an Option 

Once you've entered your PIN, the system will then link your phone call with PayGuard, and you will see the interface turn blue (as shown above) and see a green **Linked** message appear.

This lets you know that your phone call has now been linked with PayGuard.

*Tip: You can hover your mouse over the green **Linked** tick to check that you are connected with the correct caller, **using their phone number** for verification.*

Phone Keypad Process

When ready, you can then begin entering the payment details, starting with the payment **Amount**.

If you wish to schedule the payment for a later date, then you can select one in the future by clicking in the **Date** field.


If not, the payment will be processed immediately. If required by your business, you can add a **Reference** for the payment.

If you need to process multiple payments within one order, you can click **Add Payment** and repeat the previous steps.



Hint: The reference field is not required by PayGuard to continue. If your business requires a reference in this field, make sure not to forget!




Once complete, select the relevant **Method** and then click the **Confirm** button when it appears. This will include the company name (if you trade under multiple brands) as well as your payment gateway.

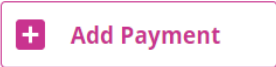
If you don't have the option to select method, you can also click **Confirm** to continue.

Pay **Refund** **Admin** 



Process

Phone Keypad   **Linked**

Currency	Amount	Date	Reference	Reoccur
£ 	Type...	 15/05/2020	Reference	No 

 **Add Payment**


Method


Your Company Name - Your Gateway Name   **Confirm**


Hint: Check with your supervisor to understand when different methods should be used.

Phone Keypad Process

Process

Phone Keypad ▼  **Linked**

Currency	Amount	Date	Reference	Reoccur
£ ▼	£50.00	 15/05/2020	<u>QWERTY123456</u>	No ▼

 **Add Payment**

Total: **£50.00**

Method

Your Company Name - Your Gateway Name ▼

Name

Mr John Doe

Address

WC2H 9JQ	71-75 Shelton Street, Covent Garden		
London	Greater London	GB (Great Britain)	▼

Should your payment gateway require the **Name** on the card your customer is paying with, or both the name and the **Address the card is registered to**, then you can begin inputting this information in the relevant fields.

Phone Keypad Process

Once the customer's details are in place, it's time to take the card information. Ask your customer to type their long card number into their telephone keypad, **followed by the hash key**.

It is important to remember that **the customer must press the hash key** when they are finished typing the long card number, and again after the expiry date, and again after the security code.

You will then start to see the card numbers appearing in the first card field, which you can see on the next page.

Hint: If you cannot see your customer's card details appearing on the screen as pictured when they enter them, there may be an issue where we cannot hear the digits they are pressing on their phone.

This can occasionally happen if there are issues on their network.

*The best course of action here is to ask the customer if they have an alternate phone number you can contact them on, like a landline, or to offer to try the **Payment Link Process** instead.*

Hint: Many customers will instinctively begin reading their card details.

Make sure to let them know beforehand that they will not need to.

If they start to read them out, it is important to ask them to stop!

For example:

"Please enter your long card number, followed by the hash key."

Once completed, repeat this process for the expiry date.

"Please enter the expiry date, as a four-digit number, followed by the hash key. For example, January 2021 would be zero - one - two - one."

Once completed, repeat this process for the security code.

"Finally, please enter the three-digit security code on the back of the card, followed by the hash key."

Once finished, you should be able to see that the information has been entered.



Phone Keypad Process

Total: **£50.00**

Method

Your Company Name - Your Gateway Name

Name

Mr John Doe

Address

WC2H 9JQ

71-75 Shelton Street, Covent Garden

London

Greater London

GB (Great Britain)

Card

4242 - XXXX - XXXX - 4242

16 digits

12/20

XXX

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



Confirm

If your customer has made a mistake, you can press the star key twice ****** on your own telephone to clear the last field, or **three times** to clear all fields.

This is displayed on the screen in case you forget.

Once you are happy that all the fields are completed accurately, click the **Confirm** button.



Phone Keypad Process

You will then be taken to the final confirmation screen.

Here, you can double check all the details entered, and confirm anything else back with the customer as required.

If you need to make any changes, clicking **Edit Payment** will take you back to the previous screen.

Hint: It's good practice to confirm the last four digits of the customer's card back to them. If they have made a mistake or missed a number out, these will likely not match.

Once you're sure everything is ready, click **Submit** to send this payment through.

You will see the message *"Processing. Please wait..."* and then automatically jump to the next screen, which will differ depending on if the payment was **Successful** or **Declined**.

Confirm Payment

Amount	Date	Reference
£50.00	Now	QWERTY123456

Total: **£50.00**

Method

Your Company Name - Your Gateway Name

Name

Mr John Doe

Address

71-75 Shelton Street, Covent Garden, WC2H 9JQ

Card Number	Expiry Date	Security Code
4242 - XXXX - XXXX - 4242	12/20	XXX

Submit **Edit Payment**

Phone Keypad Process

Declined payments will take you to here.

The system will give you an indication of why the payment was declined.

If configured for your business, you will have the option to transfer the caller somewhere else, determined by the menu under **Transfer Call To**.

Otherwise, can click **Back** to take you to the previous screen or return to the beginning with **Back to Start**.

Declined

Reason for Decline

Number is invalid, Card type is invalid: cc num

Transfer Call To

Choose an Option


Transfer Call

Back

Back to Start

Phone Keypad Process

Successful



£50.00
Received Successfully

£50.00
Token: Ml7wwwOQ2ryX9CEdkDruBwf9Bmt
PayGuard Auth: 015502

Post-Order Reference

QWERTY567890

Send Confirmation

07123456789

Transfer Call To

inSurvey

Notes

Customer very happy

Tags

Sale

Successful payments will take you here. There are several options that may be your business may have available.

*Hint: Neither the **Post-Order Reference** nor the **Notes** or **Tags** will be seen by the customer.*

A **Post-Order Reference** can be attached to an order if required by your business.

The **Send Confirmation** box allows you to send a confirmation note to either an email address or a phone number. Check with a supervisor to confirm your options. Simply type the number/address in the box and hit send.

Hint: The Email/SMS confirmation is not a receipt and should not be referred to as such to your customer. This is simply a confirmation that the payment has been processed via PayGuard.

Transfer Call To will allow you to choose somewhere else from the menu to send the call, depending on the configuration used by your business.

You can enter notes for reference in the **Notes** box.

Tags can be used by supervisors to sort by custom variables. If your business uses these, you will have guidance on what to put here.

Phone Keypad Process

Key steps to remember:

- **Link** the call when you need to use PayGuard by entering your Agent PIN on your telephone keypad.
- **Pay** tab is where you take your customer's payment.
- **Hash** key must be pressed by the customer in order to move on to the next field.
- **Star** key can be used on your own telephone keypad to clear fields, so that the customer can enter their card details again; twice for the most recent field, three times to reset all fields.





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Payment Link

Customer receive a link, and type details into webform



Payment Link Process

After you have selected the **Payment Link Process**, you can then begin entering the payment details, starting with the payment **Amount**.

If you wish to schedule the payment for a later date, then you can select one in the future by clicking in the **Date** field.

If not, the payment will be processed immediately. If required by your business, you can add a **Reference** for the payment.

If you need to process multiple payments within one order, you can click **Add Payment** and repeat the previous steps

Hint: The reference field is not required by PayGuard to continue. If your business requires a reference in this field, make sure not to forget!

Once complete, select the relevant **Method** and then click the **Confirm** button when it appears.

This will include the company name as well as your payment gateway. The company name you select will be displayed to the customer when entering their payment details, so make sure this is correct. If you don't have the option to select method, you can also click **Confirm** to continue.

Currency	Amount	Date	Reference	Reoccur
£	Type...	18/05/2020	Reference	No

Method

Your Company Name - Your Gateway Name

Confirm

Hint: Check with your supervisor to understand when different methods should be used.

Payment Link Process

Total: **£50.00**

Method

Your Company Name - Your Gateway Name

Name

Mr John Doe

Address

WC2H 9JQ

71-75 Shelton Street, Covent Garden

London

Greater London

GB (Great Britain)

Link

Please click on Generate Link



Generate Link

Should your payment gateway require the **Name** on the card your customer is paying with, or both the name and the **Address the card is registered to**, then you can begin inputting this information in the relevant fields.

Once the customer's details are in place, it's time to take the card information. Click **Generate Link**.



Payment Link Process

You will now see the unique link that can be sent to your customer.

You can copy the link and paste into any webchat or social media message, where your customer can then click on it.

*Hint: If there are any issues with your customer being able to access the link, you can click **Regenerate Link** to create a new one. Send this to them to allow them to start entering their details again.*

You can also enter an email address or phone number in the box below and click **Send**. This will send the link via email or SMS (text message).

For this example, we will show the customer journey if you had sent them an SMS, but other than the delivery of the link, the journey is the same for the customer regardless of how they receive the link

Link

https://payguard.app/ XXXXXXXXXX

Enter SMS number or email address

Customer has not opened link

Waiting for payment information

Card

Card Number (PAN) 0 digits Expiry Date

Security Code

Payment Link Process

Once your customer has received the link via the chosen method, they will be directed to a page where they can:

1. Verify their name if you have entered it in earlier;
2. Enter their long card number, expiry date and security code; and
3. Submit their card information to you.

You will see their progress updated live on your PayGuard screen.

Let's take a look at what your customer will see through this process.

Link

Link has been opened

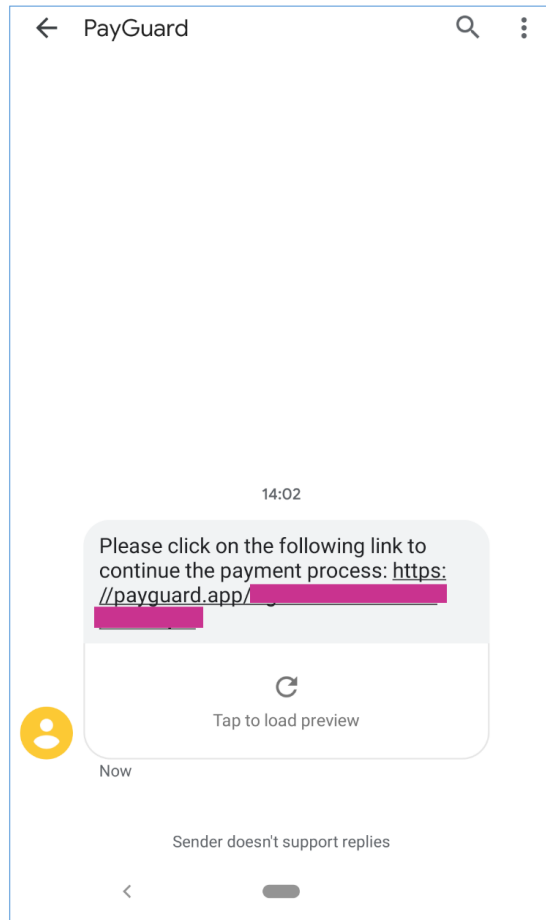
Waiting for payment information

Card

<input type="text" value="Card Number (PAN)"/>	<input type="text" value="0 digits"/>	<input type="text" value="Expiry Date"/>
<input type="text" value="Security Code"/>		



Payment Link Process



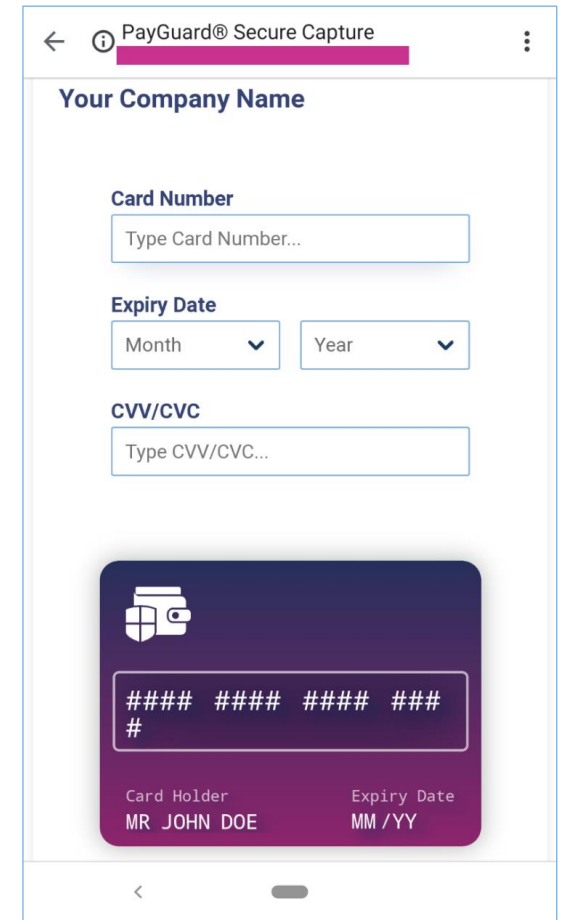
First, your customer receives the payment link via the method you have sent it to them.

In this case, via text message, which they see comes from PayGuard.

Once they follow the link, they will be taken to a page where they can enter their card details.

This page includes drop down menus for expiry date, and a diagram showing roughly where on the card the information is, to help guide the customer through if they're unsure.

The form will also confirm their name as entered by you, and the company name you selected under **Method**.





Payment Link Process

Card Number
4242 4242 4242 4242

Expiry Date
12 ▼ 2020 ▼

CVV/CVC
123

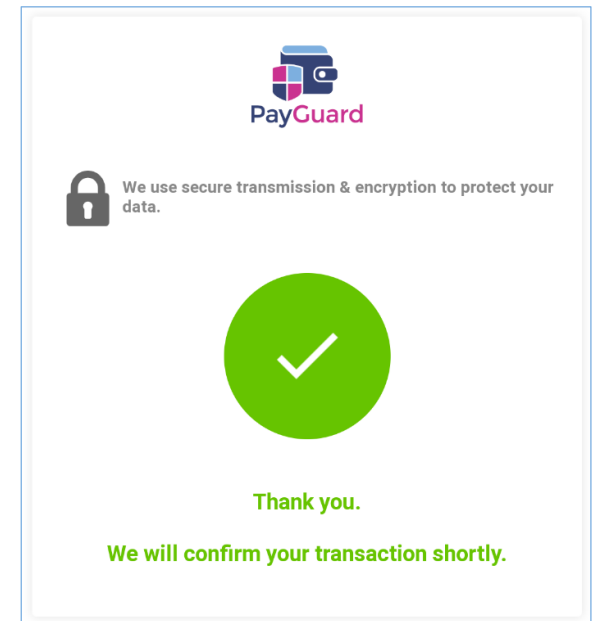


 Send

Once your customer has filled in their information, they can click the send button at the bottom of the page.

Hint: Your customer can use card details stored in their browser, for example using Google's Chrome Autofill, to complete their card details in seconds!

They will then see this message. At this point, you should now have the information required to continue.



Payment Link Process

Once the customer completes the form and sends it, you will see the information on your screen as below.

If it all looks correctly entered, click confirm to continue.

Name

Address

71-75 Shelton Street	Covent Garden	
London	Greater London	GB (Great Britain) ▼

Link

✓ Link has been opened
✓ Payment information received

Card

4242 - XXXX - XXXX - 4242	16 digits	12/20
XXX		



Payment Link Process

Confirm Payment

Amount	Date	Reference
£50.00	Now	QWERTY123456

Total: **£50.00**

Method

Your Company Name - Your Gateway Name



Name

Mr John Doe

Address

71-75 Shelton Street, Covent Garden, WC2H 9JQ

Card Number	Expiry Date	Security Code
4242 - XXXX - XXXX - 4242	12/20	XXX

 **Submit**  **Edit Payment**

You will then be taken to the final confirmation screen. Here, you can double check all the details entered, and confirm anything else back with the customer as required.

If you need to make any changes, clicking **Edit Payment** will take you back to the previous screen

Hint: It's good practice to confirm the last four digits of the customer's card back to them. If they have made a mistake or missed a number out, these will likely not match.

Once you're sure everything is ready, hit **Submit** to send this payment through.

You will see the message *"Processing. Please wait..."* and then automatically jump to the next screen, which will differ depending on if the payment was **Successful** or **Declined**.

Payment Link Process

Declined payments will take you to here.


The system will give you an indication of why the payment was declined.

Click **Back** to take you to the previous screen or return to the beginning with **Back to Start**.



Payment Link Process

Successful



£50.00
Received Successfully

£50.00
Token: F8LlWPhZ0inPNHRxTVlJdGBus
PayGuard Auth: 020500

Post-Order Reference

Send Confirmation

Notes

Tags

Successful payments will take you here. There are several options that may be your business may have available.

*Hint: Neither the **Post-Order Reference** nor the **Notes** or **Tags** will be seen by the customer.*

A **Post-Order Reference** can be attached to an order if required by your business.

The **Send Confirmation** box allows you to send a confirmation note to either an email address or a phone number. Check with a supervisor to confirm your options. Simply type the number/address in the box and hit send.

Hint: The Email/SMS confirmation is not a receipt and should not be referred to as such to your customer. This is simply a confirmation that the payment has been processed via PayGuard.

You can enter notes for reference in the **Notes** box.

Tags can be used by supervisors to sort by custom variables. If your business uses these, you will have guidance on what to put here.

Payment Link Process

Key steps to remember:

- Create the payment and enter your customer's information.
- **Generate** and **Send** the link to them via the preferred channel of communication.
- If the customer is having trouble, **Regenerate** and **Send** the link so they can try again.



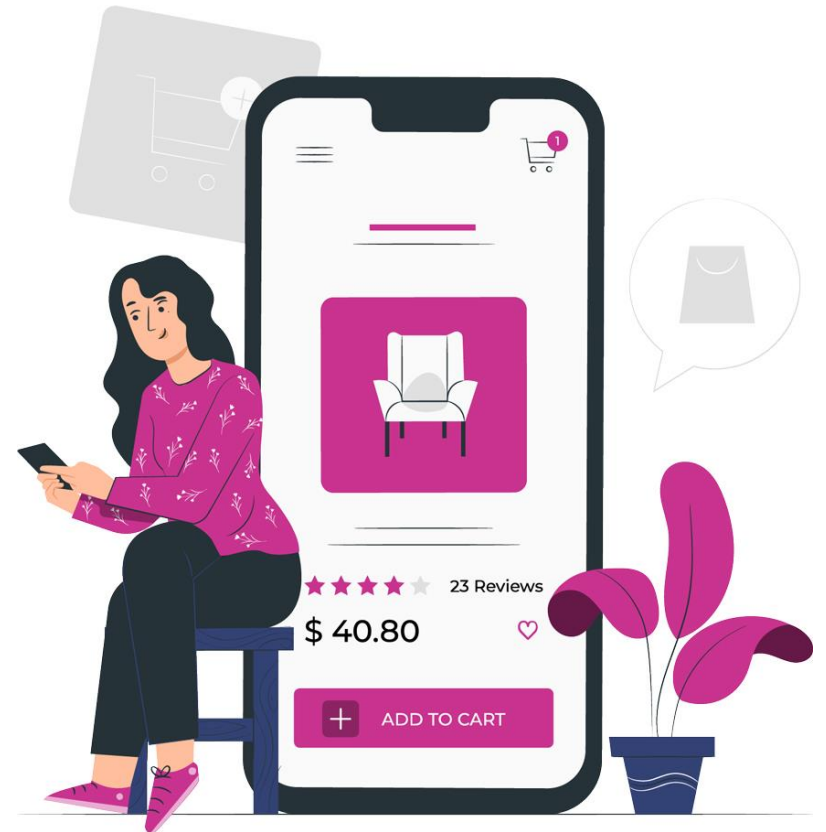


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Manual Entry

Your staff manually enter the customer's payment information.



Manual Entry Process

After you have selected the **Manual Entry Process**, you can then begin entering the payment details, starting with the payment **Amount**.

If you wish to schedule the payment for a later date, then you can select one in the future by clicking in the **Date** field.

If not, the payment will be processed immediately. If required by your business, you can add a **Reference** for the payment.

If you need to process multiple payments within one order, you can click **Add Payment** and repeat the previous steps

Hint: The reference field is not required by PayGuard to continue. If your business requires a reference in this field, make sure not to forget!

Once complete, select the relevant **Method** and then click the **Confirm** button when it appears.

This will include the company name (if you trade under multiple brands) as well as your payment gateway. If you don't have the option to select method, you can also click **Confirm** to continue.

Currency	Amount	Date	Reference	Reoccur
£	Type...	19/05/2020	Reference	No

Hint: Check with your supervisor to understand when different methods should be used.

Manual Entry Process

Process

Manual Entry

Currency	Amount	Date	Reference	Reoccur
£	Type...	19/05/2020	Reference	No

+ Add Payment

Method

Your Company Name - Your Gateway Name

Name

Name on Card

Address

Postal Code Address the card is registered to

City Region/State GB (Great Britain)

Card

Card Number (PAN) Expiry Date

Security Code

Should your payment gateway require the **Name** on the card your customer is paying with, or both the name and the **Address the card is registered to**, then you can begin inputting this information in the relevant fields.

After this, ask the customer for their payment card information and type it into the **Card** fields.

Once the customer's details are in place and you have doubled checked they are correct, click the **Confirm** button.

Manual Entry Process

Confirm Payment

Amount	Date	Reference
£50.00	Now	QWERTY123456

Total: **£50.00**

Method

Your Company Name - Your Gateway Name



Name

Mr John Doe

Address

71-75 Shelton Street, Covent Garden, WC2H 9JQ

Card Number	Expiry Date	Security Code
4242 - XXXX - XXXX - 4242	12/20	XXX

 **Submit**  **Edit Payment**

You will then be taken to the final confirmation screen. Here, you can double check all the details entered, and confirm anything else back with the customer as required.

If you need to make any changes, clicking **Edit Payment** will take you back to the previous screen

Hint: It's good practice to confirm the last four digits of the customer's card back to them. If they have made a mistake or missed a number out, these will likely not match.

Once you're sure everything is ready, hit **Submit** to send this payment through.

You will see the message *"Processing. Please wait..."* and then automatically jump to the next screen, which will differ depending on if the payment was **Successful** or **Declined**.

Manual Entry Process

Declined payments will take you to here.


The system will give you an indication of why the payment was declined.

Click **Back** to take you to the previous screen or return to the beginning with **Back to Start**.



Manual Entry Process

Successful



£50.00
Received Successfully

£50.00
Token: F8LWPhZ0inPNHRxTV1JdGBus
PayGuard Auth: 020500

Post-Order Reference

Send Confirmation

Notes

Tags

Successful payments will take you here. There are several options that may be your business may have available.

*Hint: Neither the **Post-Order Reference** nor the **Notes** or **Tags** will be seen by the customer.*

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The **Send Confirmation** box allows you to send a confirmation note to either an email address or a phone number. Check with a supervisor to confirm your options. Simply type the number/address in the box and hit send.

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Tags can be used by supervisors to sort by custom variables. If your business uses these, you will have guidance on what to put here.

Manual Entry Process

Key steps to remember:

- Select the **Method** to view the **Card** options.
- Make sure to take details as **accurately** as possible.





PayGuard

By Fusion 

Reporting

Access payment transaction data easily.



Simple and Comprehensive

History tab

If your administrator has set the permission for you, you can see the 'History' tab.

This allows you access to a **table of all the transactions**, successful or declined, over any channel, using any method, that any staff members has processed. To keep things simple we show you a table that with a few, frequently used columns, but with a couple of clicks you **can tailor this table to show any number of columns** you wish, and the list is comprehensive.

The export button allows you to **export the table to CSV**, so you can create and graphs, look-ups or charts you wish, or upload into whatever business intelligence or management information reporting tool you use.

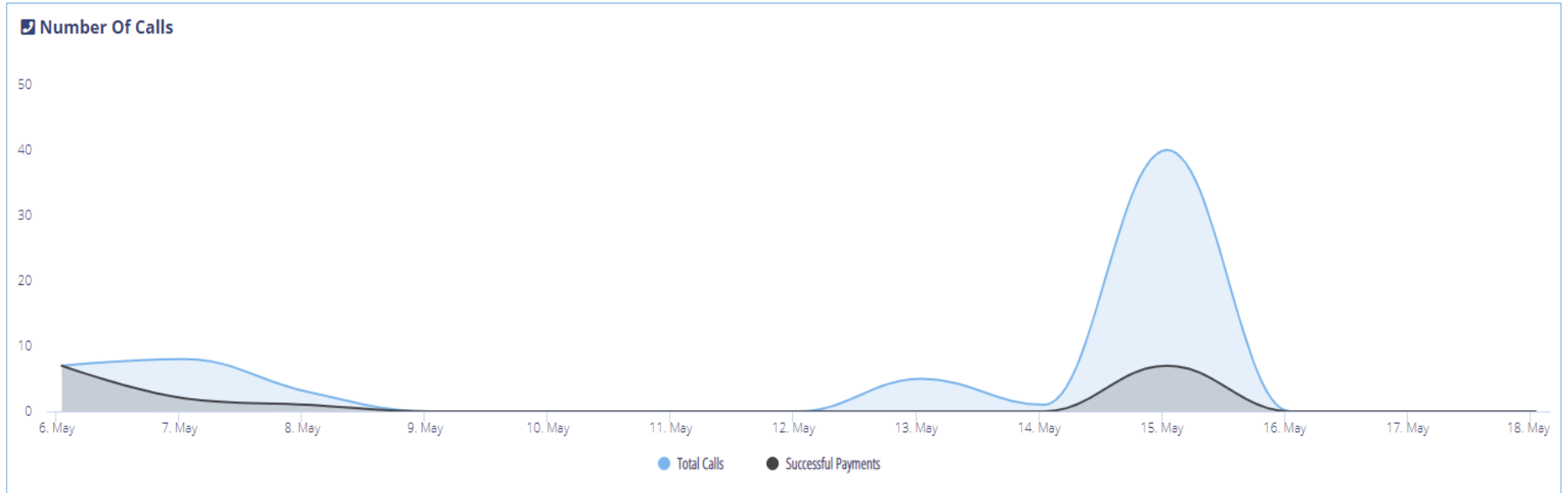
Basic and Advanced Search

Using the Basic Search you can quickly type in an amount, transaction reference, customer name, and so on, to **quickly filter** the table to show the specific transactions you are looking for.

The Advanced Search allows you to filter transactions based on the staff member who took them, the type of payment, the name of the customer, the Reference, the transaction token, any notes you may have appended to the payment record, the channel over which the payment was taken, any date range to wish to chose (up to the minute), and more.

You can use the Advanced Search to obtain a list of the transactions you wish to report on, then export them in a single click to CSV, and create a chart in Excel in minutes.

History View



Date Range

Agents

Payment Type

Name On Card

Reference

Token

Notes

Tags

Status



Table View

ID	Date	Amount	Refunded Amount	Reference	Card Number	Account	Status	Actions
529	15 May 20 17:28:06	£1.00	£0.00	1	4242-XXXX-XXXX-4242	PGDev	Success	
528	15 May 20 17:17:45	£1.00	£0.00	1	4242-XXXX-XXXX-4242	PGDev	Success	
527	15 May 20 14:54:04	£3.00	£0.00	3	4242-XXXX-XXXX-4242	PGDev	Success	
526	15 May 20 14:54:00	£1.00	£0.00	1	4242-XXXX-XXXX-4242	PGDev	Success	
525	15 May 20 14:28:03	£50.00	£0.00	QWERTY123456	4242-XXXX-XXXX-4242	PGDev	Success	
524	15 May 20 14:23:03	£56.00	£0.00	55566	4242-XXXX-XXXX-4242	PGDev	Success	
523	15 May 20 14:04:16	£12.00	£0.00	123	4242-XXXX-XXXX-4242	PGDev	Success	
522	13 May 20 16:40:50	£65.00	£0.00	6546	4242-XXXX-XXXX-4242	PGDev	Success	
521	08 May 20 14:50:14	£1.00	£0.00	1	4242-XXXX-XXXX-4242	PGDev	Success	
520	07 May 20 11:34:10	£23.00	£23.00	234455, 3265	4242-XXXX-XXXX-4242	PGDev	Success	

« 1 2 3 4 5 »

Show entries

Showing 1 to 10 of 529 entries





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Tips and Tricks

Learn these and become a pro!



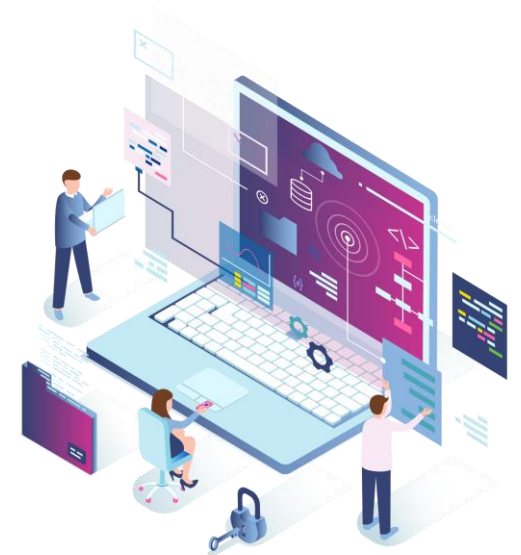
Tips and Tricks

- Bookmark or screenshot sections of this guide if you have difficulty with specific steps. Please consider the environment before printing this document.
- There's no such thing as a stupid question! If you're unsure of anything, ask your line manager or get in touch with the PayGuard team; we're always happy to help.
- After logging in for the first time, you can change your password by clicking the Settings button in the top right corner, and selecting profile.
- If you only have one Process available to you, you will not need to select one – The pay tab will appear ready at the next step
- If your direct dial number does not run through our network, you will see a number in the Call me on field that you might not recognise. It's important that you leave this number as it is, as it will be linked directly to your own and allow us to connect PayGuard to you.



Tips and Tricks

- ❌ If your customer has a menu on their phone number before you get through to them, for example, “Press 1 for Support,” then you must reset the keypad before entering your PIN. Press ## to clear any previous buttons pressed during the call and reset the PIN. This is displayed on the link screen, left, just in case you forget!
- ❌ You can hover your mouse over the green Linked message to check that you are connected with the correct caller via their phone number.
- ❌ The reference field is not required by PayGuard to continue. If your business requires a reference in this field, make sure not to forget!
- ❌ Check with your supervisor to understand when different Methods should be used.
- ❌ Many customers will instinctively begin reading their card details. Make sure to let them know beforehand that they will not need to. If they start to read them out, it is important to ask them to stop!



Tips and Tricks

- ❌ If you cannot see your customer's card details appearing on the screen as pictured when they enter them, there may be an issue where we cannot hear the digits they are pressing on their phone. This can occasionally happen if there are issues on their network. The best course of action here is to ask the customer if they have an alternate phone number you can contact them on, like a landline.
- ❌ It's good practice to confirm the last four digits of the customer's card back to them. If they have made a mistake or missed a number out, these will likely not match.
- ❌ Neither the Post-Order Reference nor the Notes will be seen by the customer. They are for internal use only.
- ❌ Email and SMS confirmations are not receipts, and as such, should not be referred to as such to your customer. This is simply a confirmation that the payment has been processed via PayGuard.
- ❌ If there are any issues with your customer being able to access the link, you can click Regenerate Link to create a new one. Send this to them to allow them to start entering their details again.
- ❌ Your customer can use card details stored in their browser, for example using Google's Chrome Autofill, to complete their card details in seconds!





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Thank you for your attention

Contact

If you have any questions on PayGuard, we are here to help. Just contact us using the information below.



03333 660 560 ... Option 1 (support)



clients@fusiontelecom.co





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