How to Refund/Return a Credit Card payment directly in Converge

Converge/Elavon is the payment processor for the Accela Customer Access (ACA) website in ePermitting. All online credit card transactions go through this processor. Participating agencies can also elect to use Converge to process their over-the-counter (OTC) credit card (CC) transactions as well – please note, this requires configuration. When a customer has requested a refund, if the payment was processed online or OTC using Converge, an agency can choose to refund the customer direct to their credit card via Converge. Refunding direct to the card saves the agency from the internal costs of processing a refund via check (check run, processing time, postage and supplies, etc).

Converge Steps to Settle Batch:

1. Log in to Converge for your agency. Go to SETTLED BATCHES to locate the settled batch that the transaction you will be refunding is located in [date it processed +1 generally - since ePermitting is 24/7, batches auto-settle just after midnight which is next day].

Converge	Q Search Payments								Terminal : C	ITY OF HAPPY	VALLEY -	marshakg 🗸
Payments	Payments						Open	the Settled Batche	s for the ager	icy ———	SETTLED	BATCHES
🏚 Settings	\$534.98									~		
Account	V APPROVED 4	AUTH ONLY	• @	DECLINED 4								
Payments Insider	Card/Check								🖹 Generate	Report 👻	DETAILED SE	ARCH
Help	All Transaction Types 🔹	All Statuses 💌								Q Search		0
	Transaction Date 👻	Account Data	Transaction Type	Payment Type	Customer	Amount (USD)	Entry Type	CVV2 Response	AVS Code	User ID	Actions	

1. Once in Settled Batches, make sure to select the time range for the settled batch date you are looking for. Open the settled batch by selecting VIEW DETAILS for the batch date you want. Then locate the transaction you wish to refund – making very sure to confirm the credit card number, the payor name, the amount, and the approval code as indicated in Accela. Many transactions are for the same amount (minimum permit fee amount), so confirming you have the correct transaction, for the correct date and approval code, is imperative. Select VIEW DETAILS again to open the specific transaction you wish to refund on.

Settled Batches	S							CURRENT BATCH
Card/Check								
Today								
Yesterday	Dropdown menu avail	lable to select the date ran	ige of your settle batch (imports	nt note, the settled t	batch date will be the	9		🛱 Generate Report 👻
Last 7 Days	Example; transac	ction date in the user inter	ace of 5/16/2022 would be incl	ided in the 5/17/202	2 settled batch			
Last 30 Days	Batch Number	Batch Type	Batch Response	Sales	Returns	Voids	Net Amount (USD)	Actions
Last 90 Days	081	DDA		8	0	0	\$4,261.29	VIEW DETAILS
05/18/2022 00.06	080	DDA		10	0	0	\$4,768.94	VIEW DETAILS
05/17/2022 00:06	079	DDA		5	0	0	\$3,578.91	VIEW DETAILS



How to Refund/Return a Credit Card payment directly in Converge

ettled Batches										CURRENT	атсн
Card/Check											
< Batch List B	atch Number 0	79 Batch Type	DDA						Ê	Generate Report	•
All Transaction Types	*		While in Settle DETAILS to op	Batches; noting w en the specific tra	hat Transaction Type y insaction to be refunde	you are looking for ad.	- select VIEW		Q Search		0
Transaction Date 👻	Account Data	Transaction Type	Payment Type	Customer	Amount (USD)	Entry Type	CVV2 Response	AVS Code	User ID	Actions	
5/16/2022 19:50		Sale	Credit Card		\$1,572.25	к	м	Y	quickpomitapi	VIEW DETAIL	s
5/16/2022 19:49		Sale	Credit Card		\$1,557.13	к	м	Y	quickpermitapi	VIEW DETAIL	s
5/16/2022 13:22		Sale	Credit Card		\$95.20	к	м	Y	quickpermitapi	VIEW DETAIL	s
5/16/2022 12:35		Sale	Credit Card		\$262.08	к	М	Y	quickpermitapi	VIEW DETAIL	s
5/16/2022 11:18		Sale	Credit Card		\$92.25	к	м	z	quickpermitapi	VIEW DETAIL	s
I< < >				1 - 5	of 5				Items per	page 10	•

2. Once you have the specific transaction open, you will select Refund at the top of the fly-out window (in the green banner). The fly-out window will refresh and you will note that the amount field is editable at this point.

Converge	Q Search Payments						Transaction Details		
Payments	Settled Batches					RECEIPT REFUND Select the REFUND button to initiate a refund to this card.			
ProductsEmployees	Card/Check					Sale Approval 07/06/2022 09:11:59.			
Settings	< Batch List B	atch Number 6	32 Batch Type	DDA		\$321.26			
e Account	All Transaction Types	•					Order Section	JUEA Credit Card	
E Feedback	Transaction Date 👻	Account Data	Transaction Type	Payment Type	Customer	Amount (USD)	Name	M3A Clearcaid	
Payments Insider	07/06/2022 09:11		Sale	Credit Card		\$321.26	Invoice Number Transaction Currency	USD	
 Help 	07/06/2022 08:48		Sale	Credit Card		\$106.40	Address		
	07/06/2022 03:53		Sale	Credit Card		\$88.48	Bill to	5035854879	
	IC ()				1 - 3	of 3		PO. Box 12223 Salem OR 97309 US permits@nothsideelectric.com	
							Authorization		
							Transaction ID User Name Auth Approval Code AVS Code CVV2 Response Tan Ref Number ECI Entry Mode	060722AC0-882E1680-9182-91E1-24852D766A2F quickgemitapi 006867 Z M 706161159 Not Authenticated Keyed - Card Not Present	

3. Once the window refreshes to the ISSUE REFUND window, edit the Amount to Refund to be the amount you are actually refunding, if not a full refund. As per the note indicated on the screenshot, many agencies retain a Refund Processing fee, or a portion of the fees for work that was already completed, etc. Change nothing else on this form and select ISSUE REFUND to complete the process.



Last modified: August 19, 2022

How to Refund/Return a Credit Card payment directly in Converge

 investion investion	💽 converge	Q, Search Payments	Teminal : CITY OF MONADUTH me
 Anound Section <	Payments Products	Issue Refund	Authorized Amount is the total amount charged to the card.
Setting: • Accel • Accel • Prevata Take • Prevata Take • Heip • Defet Section • Defet Section <	Employees	Amount Section	Many agencies retain a Refund Processing fee, or a portion of the fees for work that was already completed, etc. Once an amount is entered, nothing less would be changed on this form - select ISSUE REFUND to process the refundations of the fees the fees and the fees the fees of t
 Next Section Promote transmission P	Settings		Anverto Refue" 5 21 26 sure that this same transaction has also been done in Accels so that the two transactions utimately match for audit purposes.
Payment Index Conder Section Payment Tor Conder Gold Conder Gold Proces Tore Stration Proces Tore Strating Proces Tore St	Feedback		
Protect Type Continuer Code Continuer Code Protect Type Protect Type Protect Type Contry Protect Type Protect Type Protect Type	 Payments Insider Help 	Order Section	
Det Songer Description Second Second Pend canneled. Kereptacied Second Second OR Pend Canneled OR Prior Second Prior Second Prior Second		Payment type Credit Cand	Customer Code Photo Surger Media Surger
Biling Address		Cad Number	Execute Ferrit cancelet, fer infacted
Biling Address Implying Address Seriesy Seriesy Seriesy Seriesy First Tame Seriesy Latriane Stockson Seriesy 1 Stockson Pol Ser 12225 Stockson Advence Stockson Advence Stockson		- Express Day (1970) -	
Compression Part Name Fort Name Proof Case + Last name Country Access2 Proof Case + Access2 Proof Case +		Billing Address	
Post tase 9700 Laf same Couty * PO 8x 1223 S5555479 Couty * Address Couty * Address Couty *		Company	files training Para State +
Laframe Couty * Attention Point Statistical Point Statistical Statistical Attention Statistical Statistical		First Name	\$7300
Addess2		Last name	Country +
Ad6ex2		PO Box 12323	Constantial Constantian Constantia
		Address2	



Last modified: August 19, 2022