

Release Notes

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April 25th, 2025

Update

- Reporting: Added ACH Payment information to the settlement section of the statement.
- Reporting: Updated the format of the generated printable statement.
- Reporting: Updated the Transaction Detail Report to include the DBA Name and City/Phone information if what is sent does not match what is on file with Qualpay
- Recurring Billing: Added a link that displays the next 5 billing dates and amounts for a subscription.

March 31st, 2025

Update

- Webhooks: Initial webhook events are now sent immediately instead of having up to a 10-minute delay.
- Webhooks: When creating a new webhook added an expiry window to configure how long a webhook will retry before it is considered expired. The default is 1 hour.
- Webhooks: When creating a new webhook added a suspended count to configure the number of events are allowed before a webhook will be suspended. The default is 10.
- Webhooks: When creating a new webhook added a suspend window to configure a timeframe in which a a webhook will be suspended if it encounters only failures. By default if there are more than 10 failures in 24 hours, the webhook will be suspended.
- Webhooks: Added Network Settings to the webhook configuration administration page to allow modifying of the suspended count, suspend window, and expiry window settings on existing webhooks.
- Reporting: Background updates allowing reports to load and download faster.

February 24th, 2025

Update

- Qualpay Manager: Users who are logged off due to inactivity are now redirected to the login page.
- Qualpay Manager: Users will see a "Are you still there?" warning message 30 seconds prior to being logged out due to inactivity.
- Invoicing: Added a "Make A Payment" button on the invoicing dashboard for Outstanding orders. This allows manual payments made via Virtual Terminal to be applied to the invoice.
- Invoicing: Saved customer billing data will be added to an invoice instead of requiring it to be re-entered manually.

January 28th, 2025

Update

- Customer Vault: Added a setting to allow for all new payment methods to be verified when added to a customer record.
- API: Checkout. Added card type and expiration date to the checkout_payment_success response.
- API: Recurring Billing. Updated the subscription_payment_failure response to pass the failed transaction amount instead of 0.
- Recurring Billing: When the "Next Billing Date" field is changed in a subscription, the subscription details will now reflect the date of the customer's next payment.
- Invoicing: Updated Invoice receipts to include the tax line if one is present on the transaction.

December 18th, 2024

Update

- Invoicing: Added columns and new filters for Amount Due and Customer Phone to the Invoicing Summary report.
- Invoicing: Updated Invoicing to be able to use stored payment methods from the Customer Vault on the Invoice Payment Page.

November 19th, 2024

Update

- Invoicing: Added an auto-generate Invoice Number option. This is supported on the UI as well as via the Create Invoice API with the auto_generate_invoice_number flag.
- Qualpay Manager: Added Open Date, Close Date, Business Description, and Direct American Express SE# information to the Merchant Lookup Report available to Consolidated Merchant Account Administrators.
- API: Dynamic Checkout. When using the dynamic checkout API, the merch_ref_num can be returned and displayed to the customer at the time of payment.
- API: Dynamic Checkout. When using the dynamic checkout API, configuration options can be sent in the request for the CVV field. Can choose to show or hide the CVV field and choose if it is required or not.
- API: Customer Vault. The Get Payment Methods API call will now return the status of the token to show if the saved payment method is blocked or not.

October 10th, 2024

New Features

- Qualpay Manager: Added support for Service Fees for Government or Education merchants with the proper industry codes.
 - Service Fees are supported as both Flat Service Fees and Percentage Service Fees.

Update

- API: Dynamic Checkout. When using the dynamic checkout API, a stored customer ID can be included

in the request to allow the customer to use a stored payment method.

- Invoicing: Customers who pay their invoice by clicking on the link in the text-to-pay message will receive a text confirmation of payment success/decline.

September 10th, 2024

Update

- Notifications: Now displays all users that get notifications, including designated account administrators.
- Recurring Billing: Updated Plans and Subscriptions to reflect that transaction fees are tied to payment profiles.
- Invoicing: Updated invoices to reflect that transaction fees are tied to payment profiles.
- API: Recurring Billing. Updated tran_status to include sales with the status of V (voided sales).

Bugfix

- Fraud: Updated the settings history modal to properly display the change history for all control options.
- Reporting: Updated the Profile ID filter on reports so it will no longer give an error when selected.
- Payment Gateway: Fixed bug that stopped refunds from completing on transaction amounts with more than one comma.
- Statements: Downloaded statements will now have the .pdf suffix.
- Statements: The Aggregate Fee Percentage will only appear for merchants located in Tennessee.

August 13th, 2024

New Features

- Invoicing: Item descriptions and amounts can now be saved for use on invoices.

Update

- Fraud: Added indicators for missing required fields when saving "Do Not Disturb" settings.
- Qualpay Manager: The Transaction Fee settings have moved from the Virtual Terminal section to the Detail section of the payment profile page.
- Checkout: The Transaction Fee options have been updated to "None", "Surcharge", "Convenience", or "Payment Profile Fee".
- Invoicing: The Transaction Fee field has been updated from a toggle to a button selector.
- Invoicing: The Transaction Fee field is no longer listed as "Add fee recovery?" It is now named "Transaction Fee Type".
- API: The Customer Vault endpoint, so an existing value for customer_id cannot be changed.

July 16th, 2024

Update

- Reporting: Values for merch_ref_num and purchase_id are displayed in reporting from any transaction request sent instead of just during authorization.
- Virtual Terminal: Saved cards in Customer Vault will now display the card type if they are debit or prepaid.
- Invoicing: Ampersand (&) is now allowed in the First and Last Name fields.
- Customer Vault: Ampersand (&) is now allowed in the First and Last Name fields.
- Plugins: WooCommerce - Plugin Recurring Billing has been updated to work with the latest update for WooCommerce.
- Plugins: WooCommerce - Plugin allows for merch_ref_number to be sent in authorization requests.
- Webhooks: Updated the Webhook configuration page layout.
- Webhooks: The invoice_paid webhook will now fire when an invoice is paid in full, no matter which combination of payments fulfills the full amount.

Bugfix

- Invoicing: Fixed a bug that was causing text-to-pay invoices to fail when a cardholder responded to the text with the word "Pay".

June 7th, 2024

New Features

- API: Checkout. Endpoint added for Cancel Checkout Link. Adds the ability to "expire" an existing checkout link to prevent a customer from accessing it to make a payment.

Update

- Qualpay Manager: The Download option has been added to the Merchant Details page available to Merchant Account Administrators.
- Qualpay Manager: The Account Lookup page for consolidated Merchant Account Administrator users now allows users to sort the checking account information.
- API: Invoicing. Updated the Create Invoice endpoint to return the link to an invoice when a "true" value is sent in the request with "create_invoice_link".

May 21st, 2024

Update

- Checkout: Ampersand (&) is now allowed in the First and Last Name fields.
- Disputes: Added the ability to view notes added to a dispute by Qualpay.
- Reporting: Added a count of email notifications sent next to the Dispute Status Change link.
- Virtual Terminal: The "Required" toggle was removed from the Surcharge/Convenience Fee section of the settings page.
- Receipts: Removed the customer shipping address for Additional Invoice Payments.

May 6th, 2024

New Features

- Qualpay Manager: Merchant Account Administrators can specify a user as a PCI contact through the PCI user task.

Update

- Reporting: Transaction report now includes Customer ID column.
- Checkout: The Convenience Fee field is automatically removed for sales in prohibited locations.
- Checkout: Added option in checkout settings to set the "Save Payment Information" as required.
- Checkout: Dynamic Checkout Link. Payment methods will not be saved when the "Save Payment Method" toggle is off.
- Plugins: WooCommerce - Plugin can now accommodate transaction routing to multiple accounts.
- Receipts: Settings page has been updated to include label selections for transaction fees.
- Virtual Terminal: The Customer is Present & Customer is Not Present buttons are displayed for both credit card and ACH transactions.
- Invoicing: A receipt is sent to the customer when an invoice is paid with cash or check.
- Invoicing: Added the ability to send out invoices with ACH as the only payment method.
- Qualpay Manager: Added checking account info to the Account Lookup page for consolidated Merchant Account Administrator users.
- Qualpay Manager: The Merchant Details page available to Merchant Account Administrators now displays the following:
 - all addresses on file
 - account status
 - MCC on file
 - websites on file
 - date the account was opened
 - date the account started processing transactions
 - users on the account
 - which users get notifications from Qualpay

Bugfix

- Checkout: Updated inaccurate helper text in the Checkout configuration for "Save Payment Information".
- Reporting: Updated the Deposit Summary Report to correct errant column names.
- Reporting: Updated the ACH Statistics report to correct a "unable to browse" error.
- Reporting: Removed an extra word from the "Nacha Return Type" section of the ACH Statistics report.
- Invoicing: Updated Invoice Emails to show the correct paid dates for previous partial payments.

March 26th, 2024

Update

- Virtual Terminal: The link to the U.S. Commodity Code Schedule page in the Manage Line Items pop-up window has been updated.
- APIs: Updated the create invoice endpoint to accept vendor_id and merchant_id as name-pair values.
- APIs: Updated the copy invoice endpoint to accept vendor_id and merchant_id as name-pair values.
- APIs: Updated the get invoice payments endpoint to accept vendor_id and merchant_id as name-pair values.

- APIs: Updated the send invoice endpoint to accept vendor_id and merchant_id as name-pair values.
- APIs: Updated the invoice payments by ID endpoint to work with integrator keys.

February 29th, 2024

New Features

- APIs: Added the Statement Summary report to the reporting API.
- APIs: Added a flag that, when set to true, will set an invoice's amount to \$0 when it is canceled.

Update

- Virtual Terminal: Updated the Zip Code requirements for adding a surcharge fee on a card present transaction.
- Virtual Terminal: A warning will now appear when a convenience fee is added to a transaction for a location where they are prohibited. The convenience fee field values will be automatically removed.
- Invoice: Receipts for invoices will include the line item detail(s) from the invoice.
- Checkout: Updated the hosted payment page to show the correct messaging for convenience fees on ACH payment transactions.
- Checkout: All checkout profiles will automatically update and add ACH payments when the payment type is added to a merchant account.
- Reporting: The ACH Return Statistics report was updated to correct a column color when certain thresholds are met and was updated to provide additional ACH payment transaction line items.
- APIs: Updated the capture endpoint to allow merchant_reference and purchase_id to be posted at the same time.
- APIs: Updated the cancel invoice endpoint to accept vendor_id and merchant_id as name-pair values.
- APIs: Updated the Payment Gateway endpoint for merchants with either the surcharge or convenience fee product on their account to send in a Credit Card Payment's card_id, card_number, or card_swipe and an avs_zip which will return a response indicating if the payment is eligible for the surcharge or convenience fee.
- APIs: Updated the Payment Gateway endpoint for merchants with either the surcharge or convenience fee product on their account to send in an ACH Payment's tr_number and dda_number along with an avs_zip which will return a response indicating if the payment is eligible for surcharge or convenience fee.

Bugfix

- Invoicing: Fixed a bug that was causing text-to-pay invoices to fail to send when a customer's phone number was typed into the invoice directly instead of being saved in the customer vault.
- Invoicing: Fixed errant surcharge field being shown if a partial payment was made, even if the surcharge flag was not turned on in the settings.
- Receipts: Fixed a bug that was causing the billing and shipping addresses to display even if they were set to hidden in the settings.

January 31st, 2024

Update

- Invoice: Add support for surcharge.

Bugfix

- Recurring Billing: Fixed a bug that caused subscriptions to not fire correctly if the "next bill date" field was updated.

January 17th, 2024

Update

- APIs: Updated the Payment Gateway credit endpoint to support integrator keys.
- APIs: Updated the Payment Gateway ARDEF API to accept a card_id value.
- APIs: Updated the Payment Gateway ARDEF API to support integrator keys.
- APIs: Updated the Checkout endpoint to support integrator keys.
- Users: The user access panel's designation section now allows a user to be set as an ACH Returns designation contact.

December 21st, 2023

Update

- Checkout: Added the reCAPTCHA v3 option to the Qualpay Checkout settings page.
- Checkout: Updated the Convenience Fee message to clarify that the fee can be added for transactions on debit cards or ACH payments.

Bugfix

- Invoicing: Fixed a bug in the phone number selector in the Send pop-up window to pull a stored phone number from the customer vault record correctly.
- Reporting: Fixed a bug in Saved Reports which caused payment profiles saved as a filter to not load (on reports that support the filter type).
- Reporting: Fixed a typo in the New Information message on the NOC report.

November 22nd, 2023

Update

- Reporting: Updated the Transaction Detail report so ACH Payment transactions with a NOC will show a section titled "NOC Data" and not "ACH Return Data" to make it clear this section is informational and is not, in fact, a return.
- Reporting: The Transactions report has been updated to speed up results.
- Recurring Billing: Added Custom Fields for Subscriptions.

Bugfix

- Recurring Billing: Fixed issue that was causing the Last Updated Timestamp to not change.

- Recurring Billing: Fixed an issue that was not allowing users to change the Default Payment Method when creating a subscription directly from a Customer Record.
- Reporting: Fixed a bug that caused ACH Returns & NOCs to be included in the counts on the Dispute Dashboard.

November 3rd, 2023

Update

- Reporting: Added an Authorize button to the ACH Returns Lookup Report.
- Reporting: ACH return information has been removed from the disputes dashboard and dispute reporting. ACH returns are now located in the ACH Return Dashboard and ACH Return reporting.

Bugfix

- Reporting: Fixed a bug on the ACHP Return Detail page so it will properly support red-colored text in specific fields.
- Recurring Billing: Fixed an issue that caused default payment methods not to be able to be changed when creating a subscription directly from a customer record in Vault.

October 13th, 2023

Update

- Reporting: Enhancements to the recently added ACH Payments Returns Dashboard.
 - Removed the New Other ACH Returns link and replaced it with the New Invalid Account and New Transaction Error links.
- API: For Submit Account Updater Request (ausRequestData), Card_id is no longer required.

September 26th, 2023

New Features

- Reporting: New ACH Payments Returns Dashboard and reporting added to Qualpay Manager.

Bugfix

- SmartConnect: Merchants should no longer see an incorrect error when adding a new payment method.
- Qualpay Manager: Merchant Account Administrators can again view the list of application agreements.

August 17th, 2023

Update

- API: The Subscription Get endpoint will only validate vendor information when a body exists and the content-type header is set to application/JSON.
- API: The Invoice Cancel endpoint now accepts a vendor_id to allow integrators using an integrator key to use this endpoint.

July 26th, 2023

Update

- Invoicing: Invoicing pie chart now treats invoices in "Saved" and "Outstanding" status the same.
- Invoicing: Added the status of Canceled to the Paid filter in the Invoice Status pie chart.

July 6th, 2023

New Features

- Invoicing: New filter for Type added. Options are Invoice or Subscription.
- Invoicing: New filter for Email Sent Status added. Options are Exist or Doesn't Exist.
- Recurring Billing: Subscription Settings has a new toggle for "Always email on a failed subscription".
- API: Recurring Billing Subscription APIs can now search by multiple values.

Update

- Invoicing: The billing address used for Invoicing will be defaulted to the address on file for the merchant account.
- Recurring Billing: Subscription Description can now be updated.
- Recurring Billing: Subscription Transaction Amount can now be updated.
- Invoicing: Clicking on the Outstanding portion of the Invoice Status pie chart will filter the Invoice Summary section to show outstanding invoices for both invoicing and subscriptions.

June 15th, 2023

New Features

- Recurring Billing: Added Custom Label Value filter to subscriptions.
- API: Invoice API can now use integrator keys.

May 31st, 2023

Update

- API: Added support for both date_next and card_id to the Update A Subscription API.

May 18th, 2023

New Features

- Embedded Fields: Cards will now be checked for surcharge eligibility.
- Plugins: Woocommerce - Plugin will now detect whether a certain card type is eligible for surcharging and, if not, trigger a dialogue box to inform the end user that it is not eligible.
 - If the payment method is switched to ACH and the surcharging flag is on, it will also populate a dialogue box informing the end user that ACH is not available for surcharging.

April 25th, 2023

New Features

- Disputes: Visa Compelling Evidence 3.0 (CE 3.0) - Visa introduced a new ruleset to help challenge invalid disputes by adding "Remedy - Prior Undisputed Non-Fraud" as a response to fraud disputes 10.4 (Fraud Card Not Present) and updating previously used compelling evidence choices. At the same time, Visa made an update for issuers using consumer disputes reason code 13.2 (Canceled Recurring Transaction). Visa rules now require issuers to provide the date a customer canceled a recurring transaction along with the details of the cancellation.
- Disputes: The Dispute API has been updated to support the new "Remedy" response. A new endpoint has been added to support inquiring about associated undisputed transactions.

Bugfix

- SmartConnect: Corrected an issue that was not allowing customer lookup by phone number.

April 13th, 2023

New Features

- Recurring Billing: Added Subscription Accounts Receivable Feature that allows for sending an invoice created by Recurring Billing.

Update

- API: Added the 23-digit Acquirer Reference Number (ARN) to the Get Transaction By Pg Id reporting API.

Bugfix

- Checkout: The Required CVV toggle in the Checkout Settings is now properly enforced on the Permanent Checkout page.

April 5th, 2023

Update

- Recurring Billing: Added new settings for account receivable tracking on the subscription settings page.
- Recurring Billing: Updated subscription to support merchant-level labels.
- Recurring Billing: Added support for future payment dates to subscriptions.
- Recurring Billing: Added count of overdue invoices and overdue balances in subscription detail.
- API: Updated subscription API to return the customer record, outstanding balance, overdue balance, and custom fields in the response payload.
- API: Added rmsg to the get subscription payments service call response.
- API: Added plan_Desc and amt_tran for update subscriptions.
- API: Added future payment dates for subscriptions.

January 23rd, 2023

Update

- Recurring Billing: You may set Purchase ID to be required when configuring subscriptions.
- API: JSON arriving in a POST body will have the UTF8 null byte stripped, solving some infrequent API POST issues.
- Invoicing: A merchant's customer service email will be used as the default email for invoicing.
- Virtual Terminal: Updated the error message to be more helpful when attempting to submit incomplete transaction information.
- Virtual Terminal: Receipts for declined transactions can be sent to merchants only (does not include transaction failures).

Bugfix

- Virtual Terminal: State surcharge validation will not stop a transaction when the surcharge is set to \$0.00.
- Virtual Terminal: When Surcharge is enabled, and Billing Address fields are hidden, the Postal Code field is still displayed.
- Virtual Terminal: When the surcharge amount is removed from the field, set the Surcharge amount to \$0.00.
- Virtual Terminal: Virtual Terminal will always validate that a Transaction Amount exists before allowing submission.

December 19th, 2022

New Features

- Virtual Terminal: Added Signature feature in receipts.
- Virtual Terminal: Added a feature for skip signatures in receipts.
- Virtual Terminal: Added ability to set the Signature feature on/off from Virtual Terminal settings.

Update

- Payment Gateway: Updated to obey Colorado's 2% surcharge limitations.

Bugfix

- Recurring Billing: Fixed a bug that made it impossible to create a transaction with a subscription amount from a card_id.
- Dispute Management: Fixed the dispute vendor add/edit not registering alerts/first-time chargeback toggle states.

November 10th, 2022

Update

- Qualpay Manager: When typing in an amount to partially void/refund a surcharged transaction, the split of the surcharge and transaction amount being voided/refunded will be displayed.

Bugfix

- Receipts: Receipts for partial voids & partial refunds should show the correct calculation of transaction amount + surcharge amount = total amount refunded.
- Virtual Terminal: Fixed the prohibited surcharge pop-up from appearing when just the state field is selected. It will only pop up after selecting the zip code and state fields for a prohibited area.

October 24th, 2022

Update

- Recurring Billing: Allow plan names and descriptions to be changed on existing plans.
- Recurring Billing: Changed the logic when a modified plan auto-archives and creates a new one.
- Recurring Billing: Updated subscriptions to allow for custom fields to be used via both the UI and the subscription API.

October 6th, 2022

Update

- Qualpay Manager: Added links to merchant application agreements to the merchant details page.
- Checkout: Added surcharge message for the state of Colorado to hosted checkout.
- Recurring Billing API: Added check to prevent deletion of a customer card if it is being used in a subscription.
- Virtual Terminal/Checkout/Recurring Billing: Added Maine and Puerto Rico to the states that have restrictions on surcharging.

Bugfix

- Qualpay Manager: Fixed a display issue for MFA in the user profile.
- Virtual Terminal: Fixed an issue with the transaction amount field not updating when the surcharge amount was changed.

August 8th, 2022

Bugfix

- Plugins: Gravity Forms - If a customer has saved payment info in Qualpay Manager and adds a new card to pay for a new subscription through Gravity Forms, the subscription one-time fee will be charged to the new card instead of the old card.
- Qualpay Manager: Fixed menu sidebar links. They should no longer open links in a new window/tab.

July 5th, 2022

Update

- Virtual Terminal: Customer Number will now auto-populate in the Purchase ID field.

June 22nd, 2022

Update

- Qualpay Manager: Added a Partial Void option.
- Reporting: The Pending Summary report will have a row for each status in the summary section.

June 6th, 2022

Update

- QuickBooks: Add a new Transaction type of Payment to the desktop IIF file download.
- QuickBooks: In the desktop download modal, added a new selector for choosing transaction type. You can choose between General Journal and Payment.
- QuickBooks: In the desktop download modal, added a toggle for adding or removing Surcharge fees from transaction totals in the desktop IIF file.
- Checkout: Surcharge and Convenience Fee messages have been updated to clearly state that they do not apply to Debit/ACH (Surcharge) or ACH (Convenience fee). The messages will be hidden when a customer chooses to pay by ACH.

May 25th, 2022

Update

- Qualpay Manager: After 15 minutes of inactivity, the login modal to enter the user ID and password will automatically appear.

Bugfix

- Reporting: Fixed account number filter for the Transactions report.
- Reporting: Fixed Transaction Time filter on the Transactions report.
- Qualpay Manager: Fixed bug causing login modal to be non-centered on mobile browsers.

May 10th, 2022

Update

- Reporting: Added date filter in Pending Transactions report.

Bugfix

- QuickBooks: Corrected DBA Name/Customer Name detail in the memo field for Quickbooks Desktop.

May 2nd, 2022

Update

- QuickBooks: Added Customer detail in the memo field for QuickBooks Desktop.
- Qualpay Manager: Service Error toast messages will now last 12 seconds instead of 6 seconds.

Bugfix

- Qualpay Manager: Fixed profile button not working in merchant user management.
- Invoice/Customer Vault: Fixed bug that will not allow users to send invoices created from the customer vault page.
- Qualpay Manager: Fixed a bug causing invalid results while looking up node details, which can result in an 'invalid merchant ID' error.
- SmartConnect: Removed references to the cached merchant and cached ADDS settings, which were causing failures after the cache was invalidated.

April 1st, 2022

Update

- QuickBooks: For QuickBooks Online, Added Customer detail in the Invoice/Refund API description.
- QuickBooks: For QuickBooks Online API, when an account SubType already exists for undeposited funds, added code for another API to check/Add a different AccountSubType.
- Checkout: Removed the ability for checkout users to opt-in and out of Surcharging and Convenience fees.

Bugfix

- Checkout: Fixed bug that prevented a checkout profile from being saved if the headline section was not empty.
- ADDs SmartConnect: Fixed issue causing a "Card Type Not Supported" error.

March 18th, 2022

Update

- Reporting: Added ACH validation filter to transactions report.
- Customer Vault: Added verification for ACH payments.

Bugfix

- Reporting: Fixed bug that was not formatting excel columns for downloaded reports.

February 28th, 2022

Update

- Virtual Terminal: Update Level 2 and 3 commodity code link for 2022.

February 10th, 2022

New Features

- Reporting: In preparation for the March implementation date for ACH verification, we have added a new ACH verification report. It will only be available for merchants that take ACH payments with Qualpay.

Update

- QuickBooks: Added Db_name instead of merchant_id in customer for QuickBooks- IIF file download.
- Embedded Fields: Added js validation to prevent duplicate submission.
- API: Updated Open API SDK to v 2.0 (uses open API spec 3.0).

Bugfix

- Qualpay Manager: Fixed a typo in the MFA challenge text.

January 18th, 2022

Bugfix

- Invoicing: Fixed bug that is displaying the wrong invoice number in history when copying an invoice.
- Invoicing: Fixed bug so users cannot change customer ids on invoices with a status of outstanding.
- Invoicing: Fixed bug so users can now add a line item with price 0 as long as there is at least one line item with price > 0.
- Invoicing: Fixed canceled invoice status labels.
- Invoicing: Payment terms will now be displayed on email messages.
- Invoicing: Fixed bug that was throwing incorrect name/firm name messages when updating billing

contact.

- Invoicing: US phone numbers will now be imported properly from the customer vault to the billing contact page.
- Invoicing: Fixed bug that was automatically sending SMS to customers when a phone number was included in the invoice.

December 20th, 2021

Bugfix

- Recurring Billing: Fixed resuming a suspended subscription where if the resume is requested within a 24-hour period of the suspension, the platform will create the next subscription to be for the next subscription period instead of the one that was just run.

December 14th, 2021

Update

- Recurring Billing: The resume button alert will now display the "Skip" & "Process" buttons when a suspended subscription is resumed.
- Invoicing: The invoice Email is now updated to a newer version.

Bugfix

- Webhook: Fixed issue in webhooks validate URL that was generating a wrong signature header.
- Embedded Fields: Fixed an issue with Embedded Fields that was causing on failure function to be invoked by browser plugins.

November 29th, 2021

Update

- Reporting: Added profile id as a configurable hidden column to the transactions report.
- Reporting: Removed the extra empty box on the Batch Summary consolidated report.
- Webhook: Added billing information to the qp_payment webhook request.
- Webhook: Added merchant id to checkout vault webhook requests.

November 18th, 2021

New Features

- Recurring Billing: Added a settings page for Subscriptions to set the number of retries.
- Reporting API: Added MasterCard Merchant Advice Code to transaction requests & transactions by pg ID reporting APIs.

Update

- Embedded Fields: Will now display a red border on error fields and not display an error message since the fields with errors would move out of frame view.
- Qualpay Manager: MFA will now present a challenge if we've never seen your device configuration before (in addition to being outside a user's challenge timeframe preference).
- Qualpay Manager: New user profile MFA challenge time frame option: Never (Only prompts for MFA on device change).
- Qualpay Manager: User's devices that haven't been used in over a year will be forgotten.
- Qualpay Manager: Being presented with an MFA challenge no longer counts against a user's invalid login attempts.
- Reporting: Reports with many filters will no longer overflow the report. The filter list will now scroll instead.

Bugfix

- Reporting: Fixed a bug where click events in the first column were ignored.

October 25th, 2021

New Features

- Reporting: Added Merchant Advice Code for MasterCard to the transaction detail authorization tab in the Transactions report.
- Reporting: Added the Merchant Advice Code for MasterCard to the Transactions report filters.

Update

- Disputes: Removed the option to select compelling evidence for Visa 13.1 dispute reason code.
- Virtual Terminal: Added ability to hide Email address.

October 18th, 2021

Update

- Checkout: Ability to make options fields required on the checkout configuration page.
- Receipts: Receipts will now include transaction fees.

Bugfix

- Qualpay Manager: Fixed merchant dashboard graphs not flowing properly on load.
- Reporting: Fixed bug that prevented the detail section from loading on AUS reports.

September 28th, 2021

Bugfix

- Reporting: Fixed bug that was formatting the timestamp incorrectly in the Between Date/Time filter in

timezones to the east of UTC.

- Invoicing: Invoice Logo storage changed so the logo URL on invoice emails sent to customers will not expire.

August 26th, 2021

Bugfix

- Disputes: Fixed radio button size on dispute modal for selecting credit processed and non-disputed transactions.
- Reporting: Fixed Dispute Report as it was not refreshing after an action was taken on an individual dispute.

August 9th, 2021

Update

- Reporting: Merchant reports will now be hidden when the detail section is visible.
- Reporting: Renamed the Text to Pay report to the SMS report and added the SMS response to the Communication Response section.
- Users: Added phone number column to the report as well as in the filter options.

July 26th, 2021

New Features

- Reporting: Added Batch type to the Reconciliation batch report section.
- Reporting: The transaction detail section of reports will display the detailed description card type once the transaction is cleared.
- Reporting: The Settled Transaction report will display a detailed description of the card type.

Update

- Embedded Fields: If reCaptcha is turned off, then it will always run a tokenize type instead of a verify.
- Recurring Billing: Change payment data requests on Google Pay for subscriptions.

Bugfix

- Reporting: Fixed hover text being hidden on the dispute report top row.
- Recurring Billing: Set the maximum value of trial duration to 99 when adding new recurring plans.
- Reporting: Fixed the View transaction button access on the Dispute Report page.
- Payment Gateway: This will now catch and display errors when creating a refund request for a non-PG transaction.
- Reporting: Fixed bug that always showed the USD currency symbol on reconciliation batch report regardless of batch currency.

July 13th, 2021

New Features

- Embedded Fields: Support the Configuration of whether ACH or credit cards show on the hosted iframe.
- Embedded Fields: A la carte embedded fields will now support Google V3 reCaptcha.
- Reporting API: Settled Transactions Report has added developer_id to the response.

Update

- Virtual Terminal: Updated product to make the experience of taking payments on a mobile browser easier.
 - Combined Customer First and Last Name to a single field.
 - Removed Credit card and ACH picture.
 - Hide Transaction type buttons so there is only one option.
- Virtual Terminal: Updated settings to allow merchants to hide/display shipping address fields.
- Virtual Terminal: Updated settings to allow merchants to hide/display additional payment information fields.
- Virtual Terminal: Updated settings to allow merchants to hide/display billing address fields (except postal code).
- Virtual Terminal: Updated settings to allow merchants to hide/display the business name field.
- Virtual Terminal: Updated settings to allow merchants to hide/display the telephone number field.

June 28th, 2021

Update

- Virtual Terminal: The Purchase ID field has now moved to be under the total.

Bugfix

- Reporting: Consolidated Summary reports will load properly instead of looping.

June 21st, 2021

Bugfix

- Disputes: Fixed modal header and checkboxes in a modal window.

June 4th, 2021

New Features

- Recurring Billing: Added support for cancelation of a subscription if the initial one-time fee cannot be successfully completed.
- Virtual Terminal: The transaction page will load with a specifically selected payment profile if

available.

- API: Added support for reference_id when creating and searching customer vault.

Update

- Receipts: Virtual Terminal receipts now fit better on mobile devices.

Bugfix

- Receipts: Fixed bug that was not sending out receipt emails when a non-Qualpay transaction is refunded.
- Customer Vault: Fixed a UI bug that wasn't formatting phone numbers properly on the detail screen.

May 26th, 2021

Update

- Receipts: Truncation format now only displays the last 4 digits of the account number.
- Reporting: The Batch Report and the Settled Transaction Lookup Report will now include the auth_code in the search filter and the display columns.
- Notifications: Moved the Notifications link to the Communication section on the Administration page.
- Customer Vault: The Phone Number field now allows international numbers.
- Customer Vault: The Phone Number field now has an Indicator to denote if a number is for a mobile phone and if the customer has approved receiving messages to that number.
- Customer Vault: The Find Customer Report now has filters for *Is mobile* and *SMS opt-in*.

Bugfix

- Receipts: Refund and recharge transactions will show the appropriate receipt instead of the receipt from the original sale.

May 14th, 2021

Bugfix

- Reporting: Text to pay report will now load report data only for the selected merchant and not the user node.
- Embedded Fields: Adjusted the opacity on the Embedded card number field placeholder on Firefox so the shade matches the rest of the placeholder fields.
- Disputes: Fixed Dispute Vendor modal sizing.
- Checkout: Fixed Checkout ACH consent modal sizing.

May 4th, 2021

New Features

- Disputes: Added Pre Dispute Quick Link in Dispute Dashboard.

Update

- Disputes: Updated the Dispute Report to include Pre Dispute data.
- Virtual Terminal: Updated the input mode on the transaction amount and phone number fields to display the numeric keyboard on mobile.
- Disputes: The view transaction link on the Dispute Detail page will be computed every time the dispute changes.
- ADDs SmartConnect: Billing firm name will also be included in the tokenize/verify request when adding a new payment method using E3.
- QuickBooks: For QuickBooks Desktop, the add button is disabled for new transactions if there are no new transactions available.

Bugfix

- Reporting: Adjusted the summary totals on the Settled Transaction Lookup report to align with the appropriate columns.

April 16th, 2021

Bugfix

- ADDs SmartConnect: Fixed bug that was not sending the account holder name to PG when adding a new ACH payment on E3.
- Qualpay Manager: Fixed toast messages not showing on the login screen.
- Qualpay Manager: Fixed several issues in the login modal while logging in with MFA devices.
- Invoicing: Fixed bug that was throwing an error toast when the Invoice Settings page was loaded.
- Qualpay Manager: Fixed bug on third-party Integrations report that was not clearing merchant ID from filters when switching between merchants in the consolidated view.

April 13th, 2021

New Features

- Checkout: Now sends client_ip to Qualpay Payment Gateway for velocity check.
- Payment Gateway: Recharge button will now be displayed for refund requests.
- Embedded Fields: Will now return type id in response for ACH.

Update

- Reporting: Transaction report will no longer display "System (Old)" for user login for non-VT requests.

Bugfix

- Customer Vault: Fixed bug that was preventing customer vault from using the firm name when tokenizing ACH business accounts.
- Qualpay Manager: Fixed bug that was causing the ACH confirmation field to take up the entire page width.
- Customer Vault: Fixed bug that was causing Card number edit pencil in customer vault and checkout vault to appear outside the text field.

March 30th, 2021

New Features

- Users: Added the user's local timezone to the user profile.
- Reporting: Converted time displayed on reports to use the browser's local time.
- Invoicing: Added Google Pay support for Invoices.
- Embedded Fields: Added client IP address velocity check.
- Payment Profiles: Added Do Not Disturb hours which allows payments to be suspended during certain hours.

Update

- ADDs SmartConnect: Updated SmartConnect settings to allow for saving the settings without validation.
- Disputes: Removed response reason "cardholder No Longer Dispute" for dispute Reason Code 11.x.

Bugfix

- Qualpay Manager: Fixed an edge case toast error when a user logs in and then deletes their cookies.

Feature and Functionality Removal

- Plugins: Removed plugin support for ZenCart.

March 16th, 2021

Update

- Reporting: Added account number source filter on the Transactions report to support Google Pay.
- Reporting: IO History report is now available to consolidated users.
- Reporting: Pending Transaction Summary report is now available to consolidated users.
- Reporting: Updated separation of sections on the Reconciliation report for clarity.
- Reporting: Profile ID filter added to the Batch History report.
- Reporting: Added merchant reference number to Transaction Detail Summary report.
- Reporting: Changed the Settled Transaction report's default filter to be the batch date.

Bugfix

- Reporting: The Transaction Summary report will show proper account & virtual account numbers for digital wallet payments.
- Qualpay Manager: Fixed an issue where a merchant wouldn't be cached when the cache is invalidated/reloaded.
- Invoicing: Dashboard will now display the link to the bounced email report even if there are no bounced emails.
- Reporting: Any batch date filter set on the Batch Summary report will be copied to the Batch Detail report.
- Reporting: Date format on Batch History report reverted from international to the US.
- Reporting: Fixed broken links back to dispute details from other reports.

February 24th, 2021

New Features

- ADDs SmartConnect: New payment type added to E3 through the SmartConnect menu item. Qualpay will automatically create or update the appropriate Customer Number into Qualpay's Customer Vault so that it will match the customer number in E3.

Update

- Embedded Fields: Google V3 captcha will be enabled by default when embedded fields product is added to a merchant.
- Embedded Fields: Increased default reCaptcha interval from 15 to 30 minutes. This can be changed on the Embedded administration settings page.
- Qualpay Manager: The site framework has been updated. All reports have received usability updates.

January 29th, 2021

New Features

- Reporting: The Transactions report and the Settled Transaction report will display the last 4 of the card number (if available) for digital wallet transactions.
- Reporting: The Transactions report will now display the card data source for digital wallet transactions.
- Reporting: Added a "View in Customer Vault" button to the Actions section of transaction detail to display vault records associated with a card id (only available for merchants using Quapay's Customer Vault).
- API: Added ability to accept pre-arb using dispute API.

Update

- Virtual Terminal: Updated commodity code link for purchase card transactions.

Bugfix

- Reporting: The "Add to Customer Vault" button will appear in the Actions section of the transaction detail even if the customer record associated with the card_id is deleted (only available for merchants using Quapay's Customer Vault).

January 25th, 2021

New Features

- Customer Vault: Customer vault can now take either billing name or firm name for ACH.
- Virtual Terminal: ACH payments now require either customer name or firm name.
- Embedded Fields: V3 Captcha rules can now be configured from the settings page.
- ADDs SmartConnect: Added setting to allow duplicate card ids in E3.

January 11th, 2021

New Features

- Customer Vault: Added email address storage for payment methods.
- Customer Vault: Customer Vault users can now update card numbers with verification.

Bugfix

- Reporting: The pagination record count will again display properly.
- Reporting: Fixed a bug that was causing errors on refunds from the batch report.
- Payment Profiles: The payment profile screen will now display the correct email receipt value.

December 11th, 2020

New Features

- User Management: Added a field for the user's phone number.
- Notifications: Migrate all Email notifications to specified users.

Update

- Invoicing: Shortened the invoice link.
- Checkout: Google Pay logo changes.
- Receipts: Google Pay Integration for receipts.
- Reporting: Included API user label in the Created by Column in Customer Vault Report.
- Reporting: Added developer_id to the Vault report.
- Reporting: Added Email Address and ACH Type ID to the card id report.

November 17th, 2020

New Features

- Payment Profiles: Added ability to enable receipts by default.
- Disputes: Added Reason Code 10.1 for VISA.
- Qualpay Manager: Added account accepted card types to the Merchant Details page under Administration.
- Payment Profiles: Add a time zone indicator to the Batch Close time.
- Embedded Fields: Added support for Google Captcha V3.
- Embedded Fields: Added a settings page in Settings under Administration.
- Embedded Fields: Embedded requests will now be invalidated after a default # of declines. Defaults are configurable on the new Embedded Fields Settings page.

Update

- Invoicing: Invoice report filter options will now be displayed in alphabetical order.
- Payment Profiles: ACH Batch Close time fields will remain hidden in the merchant profile editor for

profiles that do not take ACH payments.

- Checkout/Virtual Terminal ACH Payments: If Business is selected as the Account Holder Type and a Company Name is entered in the Company field, the Company Name will override the billing first and last name.

Bugfix

- Reporting: Batch Detail report will now scroll down to the transaction detail section when a detail row is selected.
- Reporting: Funded amount in the Transaction Research report & Detail will now display the proper currency instead of UKN.

Feature and Functionality Removal

- Plugins: Removed plugin support for Shopify.

October 13th, 2020

New Features

- Reporting: Added moto-eCommerce indicator to Transactions Report search filter, and is available on the report download.
- Reporting/Disputes: Added the Reference number to the Transaction detail Settle tab and the Refund settle tab.
- Reporting: Pending Funding report will now display funding amounts pending in USD once the batch is closed.
- Notifications: Added Dispute And ACH email alerts to Notifications.
- QuickBooks: A message will be displayed if any data Sync is currently running for a merchant account and they attempt another sync.
- QuickBooks: Added Date field required.
- Qualpay Manager: Added support for separate batch close times for ACHP and Credit Cards.

Update

- Disputes: Updated the Dispute Modal help for manually entering a Credit reference number to ensure that the Refund reference number is used.
- Qualpay Manager: Updated the style of the login page.

Feature and Functionality Removal

- Reporting: Removed summarization by currency on Pending Funding Reports.

Bugfix

- Notifications: Fixed bug that was causing batch processing email notifications to not be updated.
- QuickBooks: The date range stored field will honor the required setting.
- Qualpay Plugins: Fixed an issue that was causing IE11 to be unable to load checkout pages or embedded fields for QP plugins.

September 1st, 2020

New Features

- Notifications: Added Daily Processing Summary report for consolidated and single merchant users.
- Receipts: Added the ability to create receipt profiles on the receipt settings page (available if the merchant account has more than one payment profile).
- Receipts: Added the ability to support multiple receipt settings per merchant.
- Receipts: Added receipt label and receipt profile ID fields to the receipt settings page.
- Receipts: Added payment profile to the receipt settings page.
- Receipts: A receipt profile can be linked to one or more payment profiles.

Update

- Invoicing: Reorganized the action buttons on the Invoice preview page.
- Invoicing: Color improvements of the invoice header section to work better with merchant branding/icons.
- Reporting: Added Login ID as a filter on the Transactions report.

August 18th, 2020

Feature and Functionality Removal

- Qualpay Manager: Internet Explorer 11 is no longer supported.

Update

- Reporting: Pending Funding report will ignore zero dollar batches.
- Reporting: Pending Funding report is available for users at a consolidated level.
- Reporting: Funded currency in the footer on the Pending Funding report will display in USD.

Bugfix

- Reporting: Corrected issue that caused incorrect sorting on Pending Funding report.

August 7th, 2020

New Features

- Reporting: Added a new Pending Funding report that will allow tracking of amounts to be funded.

Update

- Disputes: Removing Download PDF from dispute detail.
- Disputes: The Response Description field allows a maximum of 100 characters for MasterCard and 5000 for other Card Brands.
- Disputes: Consent Message Updated.
- Reporting: The account updater report will be sorted by Request ID in descending order by default.

July 31st, 2020

New Features

- Disputes: Dispute detail includes issuer country (if present).
- Reporting: Dispute History report download includes a column for issuer country.
- Reporting: Pending Transactions report now includes a summary section.

Bugfix

- Reporting: Card id report will no longer load Account Updater columns repeatedly every time the report is loaded.

July 21st, 2020

New Features

- Disputes: Dispute Modal Changes for MasterCard.
- Reporting: Added Expiry Date Columns and filter to the dispute report.
- Reporting: Only Dispute Adjustment records will be linked to the dispute page on the Adjustment report.

Bugfix

- Receipts: Fixed bug preventing receipt logo upload.
- Users: Fixed incorrect day check for password age in the user profile.

July 14th, 2020

New Features

- Receipts: Added sections for billing and shipping information in the receipt.
- Receipts: Added Sub-footer text in the receipt.
- Receipts: Added a toggle to display/hide billing and shipping addresses on the receipt settings page.
- Receipts: Added a toggle to display/hide Merchant Reference No, PG ID, Purchase ID, or Sub-footer on the receipt settings page.
- Reporting: Added firm name field for checkout transactions on the Transaction report.
- Disputes: Added processing spinner on dispute modal while credit process and non-dispute transaction services are pulling data.
- Recurring Billing: Added payment profile filters to Plan and Subscription reports.

Update

- Receipts: New layout for view/sends the receipt.
- Disputes: Optimized credit process and non-dispute query on dispute modal.
- Recurring Billing: Profile ID can now be updated on active subscriptions.

July 2nd, 2020

New Features

- Virtual Terminal: Customer Name and Phone Number can now be set to required.
- Virtual Terminal: ACH Payment Type can now be hidden for specific users.
- Virtual Terminal: Focus on CVV and Exp Date fields while on a mobile device will open the numeric keypad.

Update

- Reporting: Removed max limit on the "Control Number" filter for the Dispute History report.
- Reporting: Added batch type column to the Batch history report.
- Virtual Terminal: The Purchase ID field has moved from the Additional Payment Details section to below the Card Detail information.
- Recurring Billing: Customer and Plan quick search fields will display error messages if the user tabs out of the field without selecting a customer.
- WooCommerce Plugin (release version 3.1.3): Updated subscriptions to comply with Visa and MasterCard regulations for Negative Option Billing.

Bugfix

- Dispute API: Fixed bug where dispute API was returning success response even though it was failing to attach documentation that did not meet requirements.
- WooCommerce Plugin (release version 3.1.3): Fixed Bug for shipping charge.

June 16th, 2020

New Features

- Fraud: New merchant settings page to manage Qualpay Payment Gateway fraud flags.

Update

- QuickBooks Sync: Support for HTTP 400 error from QuickBooks, which is received when a merchant tries to import data into QuickBooks when they have marked books "closed" for a financial period.
- Checkout: Permanent Checkout Link. Supports purchase ID, Amount, and Phone No in the query parameter.

Bugfix

- Recurring Billing: Display appropriate error message on subscription details when billing card is no longer available.
- Reporting: Batch History report will display empty string instead of text "undefined" if cardholder name is not available.
- Qualpay Checkout: fixed horizontal scrolling on the logo section.

June 2nd, 2020

New Features

- Virtual Terminal: Merchants can now change the label on the Purchase ID and Merchant Reference fields.
- Reporting: Research Report - added a legal entity filter.
- Reporting: Transaction Detail Report - Optional & customer information will display for static checkout transactions.

Bugfix

- Checkout: Static checkout profiles will no longer see the "None" ReCaptcha type.
- Embedded Fields: The card icon on the card number field will now match the card number entered.
- Profile Settings: Switched the order of required fields on Virtual Terminal settings to match the order on label fields.
- Checkout: Max value of purchase ID is 25 characters.
- Checkout: Fixed error that was generated when sending an e-mail post-transaction.
- Checkout: Fixed issue where clicking on the Close button does not bring back the New Checkout Profile button.
- Checkout: Added a validation that the "create checkout profile link" API can not be used with the Static profile.
- Checkout: Fixed issue where updating checkout label was not automatically refreshing the label in the drop-down.

May 18th, 2020

New Features

- Virtual Terminal: Merchants can now change the label on the Purchase ID and Merchant Reference fields.
- Receipts: The receipt will be displayed after a successful Void, Capture, Refund, or Recharge from Transaction Details.
- Vault: Merchants can now add a Card ID to Customer Vault from Transaction Details (available only for cards not already in Vault).
- Reporting: The Profile Lookup filter is now available on pending, batch, settled transactions, and transaction reports.
- Vault: The Customer Detail page will display disable or delete buttons on default billing and shipping addresses.
- Qualpay Manager: Merchant Admin Settings & Notification pages will now display the merchant selector modal for consolidated users.

Update

- QuickBooks: Changed time zone format in QuickBooks sync emails.
- Integrator API: Get Merchant Settings will include the profile label in payment profiles.

Bugfix

- QuickBooks: Fixed large upload email not being sent for QuickBooks Online sync.

May 6th, 2020

New Features

- Checkout: Checkout is now protected by Google reCAPTCHA.
- Reporting: The transaction detail report's authorized tab will now be visible for declined refunds and credits.
- Reporting: The transaction detail report's summary section will now always show the response code.
- Virtual Terminal: Line Items can be added for all cards, not just purchasing cards.
- Recurring Billing: The subscription payment gateway profile can now be overridden by any other profile of the same currency when creating new on-plan subscriptions.
- Recurring Billing: Purchase ID can now be added for Off-Plan Subscriptions.

Update

- Customer Vault: Downloading customers in JSON will parse the billing card data and create one row per customer+billing card.

Bugfix

- Reporting: Removed extra space in the transaction status label on the Transactions report.
- Disputes: Supporting Documents help bubble change for Dispute modal.
- Checkout: Profile label change from static to permanent.

April 27th, 2020

New Features

- Receipts: Can now configure line items to appear on the receipt.
- Receipts: Can now configure a reply to email address.
- Receipts: Can now configure a "From Name" (First and Last name) that will appear on emailed receipts received by customers.
- Timezone: New merchants will board with the best guess timezone, based on zip code. Email receipts from Qualpay products now support format based on a timezone.

Update

- Reporting: Pending Transaction report will show all pending transactions by default.
- Reporting: Pending Transaction report can now be filtered by profile id.
- Payment Profiles: AVS and CVV settings in the payment profile are now reversed to show settings more clearly.

Bugfix

- Virtual Terminal: When the send email receipt option is enabled, customer email is now required.
- Qualpay Manager: Added the custom user profile menu while in mobile view.
- Qualpay Manager: Added missing user profile menu item link to the merchant mobile menu.
- Qualpay Manager: Fixed several instances of broken menu icons in mobile view.

April 15th, 2020

New Features

- Virtual Terminal: Added toggle to send receipt to the customer.
- Virtual Terminal: Added option for merchant receipts to be sent for both successful and declined transactions.
- Qualpay Manager: Added "send me a copy" option for merchant receipts on invoice, checkout, and subscription transactions.
- Checkout: Merchants can now choose a payment profile while creating a static checkout profile. If the account has only one payment profile, it will be selected automatically.
- Checkout: Added new label "Payment Profile id" in static checkout profile administration page.
- Checkout: Added feature so Merchant can choose the ACH label in the checkout profile administration page.
- Checkout: Added new label "checkout profile type" in the checkout profile administration page.

Update

- Qualpay Manager: Moved email receipts for the VT, invoice, checkout, and subscription to the Notifications section.
- Recurring Billing: Plans - Updated Trial duration label for clarity.

April 6th, 2020

New Features

- Recurring Billing: New Recurring plans UI with support for DBA suffix (negative option).

Bugfix

- Checkout: Updated checkout tags so checkout is styled properly on Firefox.
- Checkout: Checkout loaded on the modal will now scroll properly on Safari.
- Checkout: The checkout page will scroll to page top after success or failure.

March 27th, 2020

New Features

- Vault: Added ability to edit card numbers and ACH data fields.
- Vault: Added ability to update the Type ID for ACH payment methods.
- Checkout: Added the ability to "Add" payment details to Customer Vault via Dynamic Checkout.
- Checkout: Added the ability to "Edit" payment details in Customer Vault via Dynamic Checkout.

March 18th, 2020

New Features

- Qualpay Manager: Added Designated Contacts list to the Merchant Details screen in the Administration section.

Update

- Qualpay Manager: Moved email notification indicators for the batch close, daily Invoice, Subscription, and Account updater from merchant Settings to Notifications in the Administration section.
- Qualpay Manager: Added support of multiple email addresses for notifications of batch closure.

March 6th, 2020

New Features

- Qualpay Manager: The User Profile Security page now allows a password reset email to be sent for others.

Update

- Qualpay Checkout: Improved UI. Expire Link Days and Minutes are now in drop-down boxes for usability.
- Reporting: Reports will now highlight the last selected row.

Bugfix

- Qualpay Checkout: Defaulted to e-mail address is required.
- Qualpay Checkout: If the checkout profile is disabled the checkout page will not load.

February 24th, 2020

New Features

- Qualpay Manager: Users can now change their own password and email address in their profile.
- Qualpay Manager: A Users' email address is now tracked as verified and can be manually verified.
- Qualpay Manager: The time of a user's last password change is now tracked.
- Qualpay Manager: The user security page now allows users to modify how often MFA devices are prompted.
- Qualpay Manager: Added MFA support for YubiKey OTP.
- Reporting: Added card id filter to the Transaction Research report.
- Payment Gateway: Payment Gateway transactions will now use the new receipt format.

Update

- Qualpay Manager: Updated general styling to a darker content background.
- Qualpay Manager: Updated the user profile menu and style.
- Qualpay Manager: Reworked how adding SMS and Virtual Authenticator happen to be more user-friendly.
- Qualpay Manager: The Virtual Authenticator now requires a valid code before it will attach.
- Qualpay Manager: Updated login page and login modal to support new and multiple MFA options.

Bugfix

- Qualpay Manager: Transaction Report will now display the Transaction Source.

February 10th, 2020

New Features

- Checkout: Surcharge support for recurring.
- Checkout: Added support for Convenience fees.
- Checkout: Permanent Checkout Link. Allows merchants to do multiple checkout transactions using a single checkout link.
- Reporting: New column, source, added to transaction report.

Update

- Embedded Fields: Added CVV length validation.
- Recurring Billing/Plans: Profile labels will be displayed instead of the profile currency in recurring billing and plan profile id drop-downs.
- Recurring Billing: The Profile ID label will be displayed in the recurring billing detail screen.
- Reporting: Account number filter on Transaction report will default to CONTAINS instead of IS.
- Reporting: The funded amount column in the PDF batch report will be displayed only if there are transactions that are funded.

Bugfix

- Checkout: Added validation so if the email receipt toggle is on, an email address is required in checkout settings.
- Checkout: Missing recurring frequency text for "Weekly" will now again appear in the preview window when selected.
- Disputes: Dispute amount help bubble fix on dispute modal.
- Invoice: Corrected an issue that prevented users from creating a new customer from the Invoice page.
- Account Updater: Fixed bug that prevented users from enabling/disabling account updater.

January 30th, 2020

Update

- QuickBooks: Changed from toast to modal (with OK button) for the export email confirmation.
- QuickBooks: Fixed timestamp in the email notification to an easier-to-read format.

Bugfix

- QuickBooks: fixed code when getting HTTP 401 (Unauthorized Token) error from QuickBooks API response.

January 14th, 2020

New Features

- Recurring Billing: Off Plan subscriptions (UI and API) can have surcharges.
- Recurring Billing: Convenience fees can be enabled at the merchant level.
- Virtual Terminal: ACH confirmation fields can be enabled/disabled on the Payment Settings page.
- QuickBooks: Added email messaging for QuickBooks Terms and Conditions page.

Update

- QuickBooks: Added terms and Conditions page to Qualpay website.

Bugfix

- Reporting: Fixed "Internal Error" on Card id report when using the account number filter or advancing to another page.
- Reporting: Fixed issue that prevented PG log and API access log reports from modifying the default number of days back in the timestamp filter.

December 30th, 2019

New Features

- Checkout: Name required for ACH configuration on checkout setting.
- QuickBooks: Added email messaging for large exports to QuickBooks.
- QuickBooks: Added email messaging for QuickBooks Terms and Conditions page.
- Qualpay Website - Privacy Policy: Added information regarding CCPA.

Update

- Invoice: Updated headers for personal and payment information sections.
- ACH: Qualpay ACH Payment transaction limit had changed to support amounts over \$5,000 US.
- API - Embedded Fields: ACH users will be asked for the account type in two steps, rather than one.
- API - Embedded Fields: ACH users will be asked to confirm their account number. This is an optional field and can be turned on or off by the merchant via the API.
- API - Embedded Fields: A numeric keypad will be displayed on mobile browsers when the focus is on payment data.
- Reporting: The Pending Transaction report can be filtered by Source.
- Reporting: The Batch Report PDF will now display the first and last name prior to the settlement of the batch.

Bugfix

- Reporting: The Batch history report will no longer display a duplicate detail section.

December 9th, 2019

New Features

- QuickBooks: QuickBooks Sync for QuickBooks Online and QuickBooks Desktop is now available.
- ACH Payments: Added merchant ID to reject, late return, and NOC email notifications.
- Developer Center: Qualpay Checkout 2.0 is now available. Support for modal-window, customization, and recurring billing included. Documentation changes for Checkout 2.0.
- API - Account Updater: Requests can be created for specific card ids.
- API - Account Updater: Requests can be canceled through API if the request has not been sent out to the AUS engine.
- Account Updater: Account updater requests can now set the harvest source to either card or customer vault (can be managed in Qualpay Manager or via API).

Update

- API - Account Updater: Moved the AUS reporting APIs to Account Updater API so all AUS-related APIs are grouped together.

Bugfix

- Qualpay Manager: The transaction refund warning message will now display the appropriate message (partial or full refund) and the correct refund amount based on the amount to be refunded.
- Reporting: Pending transaction report will show the transaction creation timestamp in the auth time columns for refunds that are not authorized.
- ADDs SmartConnect: Fixed VPN and CORS version to support expiration years less than 4 digits.

November 20, 2019

New Features

- ADDs SmartConnect: Add payment method modal in customer vault and smart connect will use the merchant record to identify accepted payment types instead of PG profile.
- ADDs SmartConnect: Added support for ADDs to allow a letter in the account number for the "check digit".
- Customer Vault: Deleting all billing cards using the Customer Vault API will now clear the primary card number field.
- Webhook: Added webhooks for creating and updating subscriptions.

Bugfix

- Reporting: Fixed spacing issue for the Action buttons on the transaction detail page.

November 4, 2019

New Features

- Reporting: Transaction Research Report - The transaction Research report will now indicate if the sale amount has been adjusted on open batch refunds.

October 17, 2019

New Features

- Webhook: Added Webhook for ACH Returns.
- User Management: When a user's status is changed to Disabled, the user is immediately logged out of Qualpay Manager.
- Recurring Billing: Added a new option to skip billing cycles when resuming a suspended subscription.
- Payment Profiles: Added a label to the profile editor. The label will be displayed in the Virtual Terminal payment profiles drop-down menu.
- Reporting: Batch History Report - Pending Batches can now be included in downloads.
- Reporting: Card ID Report - New filter to search by Cardholder Name.
- Reporting: Card ID Report - New column added for the date the Card ID was created.

Update

- Password Reset: When attempting to reset a password, the text is now generic. Text now states that if the user login is valid an email will be sent to the email on file for that user. Text no longer states if the user login is valid or not.
- Disputes: ACH - The "Accept" button will now display for both fulfilled and new ACH cases.
- Disputes: ACH - The count for new ACH cases on the dispute dashboard will now include both fulfilled and new ACH cases.

Bugfix

- User Management: Fixed reversed toggles for Customer Vault options of Update Customer and Delete Customer.
- User Management: Fixed issue which could allow case insensitive users to be created.
- Qualpay Manager: Fixed issue with some icons not appearing in chrome.

October 2, 2019

New Features

- Disputes: New ACH Cases - Add status filters for New and Fulfilled.
- Disputes: ACH - For Notice of Changes (NOCs), the ACH Payment Notes are now available to view.

Update

- Developer Center: Updated to include the developer portal Webhook guide links.
- Disputes: ACH - Update the filter to allow for NOCs in the report.
- Disputes: ACH - Added the ability to change the status on a NOC that is currently a "Fulfilled" or "New" status to "Accepted".
- Disputes: ACH - Update the type hover over for N. N hover will now display as NOC. Dispute detail will show as "N - Notification Of Change".
- Disputes: ACH - Removed Financial Adjustment Section of Dispute Detail page.
- Disputes: ACH - Renamed Dispute Data section to be ACH Payments.
- Disputes: Detail - Updated the Dispute Amount, Dispute Status, and Dispute Status Date fields to remove Dispute from the field name.
- Reporting: Updated Transaction Detail to not include K and X dispute types in the Dispute tab.
- Reporting: ACH NOCs and Returns to be labeled appropriately as an ACH Case instead of a Dispute.
- Checkout Settings: Removed notification URL and allow partial payments from the UI.
- ADDs SmartConnect: Creating a new token via SmartConnect will now require the First and Last

Name as well as the cardholder address.

- ADDs SmartConnect: Supports CORS and alternate VPN solutions.

September 24, 2019

New Features

- Subscriptions: Added View Failed Subscription Transactions link to the subscription summary page.
- Subscriptions: Added First Name and Last Name columns to the subscription dashboard.
- Reporting: Added a status filter to the Settled Transactions Report for ACH rejects.
- Reporting: Settled Transactions report will now include the reference number.
- Reporting: The batch number on the Batch History report will now link to the reconciliation report once the deposit is on its way.
- Reporting: The Transactions report now allows search by Developer_id.
- Reporting: The Transaction Detail page will now link to the related Subscription ID on subscription transactions.
- Reporting: Dispute report has new filters to handle ACH Late Returns and ACH NOCs.
- Reporting: Added a new column for "Payment Type" to the Dispute report.
- Disputes Dashboard: New ACH Cases will present NOC and ACH Late Returns when the merchant is enabled for ACH.
- Manage Users: Added new access item controls for additional products and reports.
 - Merchant Details
 - Webhook Administration
 - ADDs SmartConnect
 - ADDs SmartConnect Settings

Update

- Reporting: Updated the filters on the Settled Transactions report so they are listed alphabetically.
- Reporting: The Batch History report PDF will show "Rejected" in the funded amount column if the transaction is rejected.
- Reporting: Updated the Dispute Detail page to accommodate ACH payments.

Bugfix

- Subscriptions: Corrected the View All Subscription Transactions link on the subscription summary page so the correct filter is applied.

September 11, 2019

New Features

- Reporting: The Transaction Detail Report's Authorize tab can now be multiple colors. The color of the tab will be based on the status of the transaction. Red indicates that the transaction is not successful or if it is held. Green indicates that the transaction is successful.

Update

- Reporting: The Settled Transaction Report will now download only the columns that are available in

the report configuration.

- Reporting: The Card ID Report will now download only the columns that are available in the report configuration.

August 27, 2019

New Features

- Reporting: The Transaction Research Report will now display the reject reason description for rejected transactions.
- Reporting: The Pending Batch Report will now include First Name, Last Name, and Purchase ID.
- Reporting: The Settled Transaction Report now has a “developer ID” filter and column.

August 9, 2019

Bugfix

- Reporting: Excel export for Statement report was throwing an error when multiple reports are exported.

July 22, 2019

New Features

- Customer Vault: Customer vault record will now require either customer name or firm name to create a new vault record.
- Customer Vault: Customer ID can now contain underscore (_).
- Recurring Billing: Recurring subscriptions can now be scheduled on customer cards other than the primary card.
- Recurring Billing: Recurring subscriptions can now support daily frequency.
- Receipts: New transaction receipts in the UI are now aligned with the emailed transaction receipt.

Update

- API - Embedded Fields: Older versions of embedded fields that do not use transient keys will no longer be supported.
- API - Checkout: The Checkout profile will no longer be associated with an API profile. Will need to send checkout_profile_id in order to indicate.
- API - Checkout: If more than one checkout profile is present, the checkout profile id should be included in the create checkout API.
- API - Recurring Billing: When scheduling a recurring payment, the one-time payment can be skipped by sending a new flag.
- API - Recurring Billing: Recurring subscriptions can be scheduled on customer cards other than primary.

July 2, 2019

Update

- Disputes: Disabled the Submit button while doc is loading.
- Disputes: Disabled Submit button once it is clicked, preventing multiple dispute response submissions.

June 20, 2019

New Features

- Payment Profile: The Payment Profile editor now allows the profile id to be copied to the clipboard.
- Account Updater: New APIs for Account Updater allows putting a card id on hold or release a card id from hold.
- Disputes: GET Dispute API can now return the purchase ID.

Update

- Reporting: Account Updater report will now accurately display if card id is on hold or not.
- Virtual Terminal: New validations to the VT will display the proper error message for using ACH with surcharge.
- Payment Profiles: When switching between payment profiles, the payment profile editor will prompt the user to save the page if there are unsaved changes.

June 11, 2019

New Features

- Receipts: Receipt customization settings added to the profile administration page.

Update

- Disputes: Response document bucket size increased to 10mb.

June 3, 2019

Update

- Virtual Terminal: Updated receipt to support ACH addendum text.
- Virtual Terminal: Toggle added when ACH selected as payment type to indicate if the customer is present/not present.
- Receipts: Add customer name.

Bugfix

- Disputes: Responses that include a secured PDF will display the correct error responses.

May 29, 2019

Update

- Qualpay Manager: Refactored layout of the merchant admin dashboard.
- Receipts: Overhaul email receipt and invoice templates for the new design.

May 13, 2019

Bugfix

- Customer Vault: Fixed fancy card to display the last digit of masked card number and CVV for Amex cards
- Virtual Terminal: Fixed bug on Virtual Terminal customer that was not searching for customers by the last name

April 29, 2019

Update

- Virtual Terminal & Customer Vault: zip code is no longer required for ACH payments.
- Disputes: Dispute Response can be submitted only when a dispute is in a *new* status.
- Disputes: Action buttons are disabled when the data is loading in the modal window.

Bugfix

- Reporting: The card ID report is now available again.
- Embedded Fields: A la carte fields will now work properly when iframes from non-Qualpay domains are embedded in the application.

April 12, 2019

Update

- Developer Center: Embedded fields will return card type and expiration date.
- Developer Center: The PR API form will now send the appropriate tokenize option when verifying a card.

April 3, 2019

Update

- Disputes: Updated the financial adjustment section of the dispute details page to display all the

columns for consolidated users.

- Invoice: Creating a new invoice from the customer page in Vault will pre-populate invoice billing contact information with data from the customer record.
- Virtual Terminal: Surcharge is not be allowed at the same time as convenience fees.
- Reporting: Transactions Report > Authorization detail tab will be displayed for refunds if the refund contains an authorization code (Per Visa Purchase Authorization Mandate).

March 18, 2019

Update

- Customer Vault: Customer first name and last name will now accept hyphens, apostrophes, and spaces.
- Customer Vault: Changed references to Billing Card to Payment Method on Customer Vault page.
- Virtual Terminal: Fixed a misleading error message on Virtual Terminal, when transaction declines the customer record is still written to the customer vault, the error message reflects behavior accurately.
- Invoice: A zero dollar line item can be included on an invoice, a zero dollar line item must be paired with a line item > \$0.01.

March 11, 2019

Update

- Developer Center: Updated WooCommerce compatible version.

March 4, 2019

Update

- Developer Center: Updated the “tested up to” to version 5.1 for WooCommerce and Gravity Forms. Also added the latest plugin version.
 - Reporting: Fixed issue that caused authorization/verification to show as declined when they were really approved.
 - Invoices: Fixed link to the undeliverable report.

February 26, 2019

Update

- Disputes: Fixed issue that caused the dispute response detail to not load correctly.

February 9, 2019

New Features

- Developer Center: Added Shopify Cashier App.

Update

- Reporting: Changed labels in reports -
 - Card Number is now Account Number
 - Card Type is now Payment Type
- Reporting: Fixed issue with some date filters not filtering properly.
- Disputes: Fixed issue where clicking on a dispute did not display the dispute details.

January 31, 2019

New Features

- Payment Gateway: The Account Details page in Administration section now shows the currencies accepted via the Qualpay Payment Gateway.

Update

- Invoice: Fixed issue that prevented users from sending an invoice when an email address was previously saved on file.
- Dispute: Fixed issue that allowed the same dispute to be accepted multiple times.
- Plugin: Update to WooCommerce plugin. The new version is now 3.0.4.

January 17, 2019

New Features

- Customer Vault: Increased the size of the add billing card modal so the entire page is displayed without the need for scrolling.
- Embedded Fields: CVV field now has the option to be required.
- Checkout: Transactions can now include firm name when creating customer and specify moto e-commerce indicator in the checkout request API.
- Qualpay Manager: Disabled pinch-zoom to prevent zooming in when tapping on input on mobile.

Update

- Customer Vault: Fixed issue that prevented users from adding billing cards in the create customer screen.

December 21, 2018

New Features

- Invoice: Invoices can now take decimals in line item quantity.
- API - API Profile: The API Profile editor will now display only Active and Disabled profiles. Profiles in Deleted status will be hidden.
- Payment Gateway: Zipcode now supports sending 10 alpha-numeric characters in the format of 1234-12345.

December 17, 2018

Update

- Dispute: Added validation to count no of pages for dispute document. Retrievals are limited to up to 4 pages and chargebacks are limited up to 19 pages.
- API - API Report: Added auth_tran_id to transaction API report.

December 3, 2018

Update

- API - Dispute: Added ability to reset a dispute in the production environment while the dispute is in *Qualpay Review* status.
- API - Checkout: Added card_id to the Payment Gateway response schema document.

November 19, 2018

Update

- Invoice: Users will now be prompted to enter the reminder interval in Invoice setting page if the user selects the option to send a reminder notice.
- API: New Transaction report (API) can be used to pull transaction request details.
- API: Renamed Transaction Report (API) to Settled Transaction Report.
- API - Dispute: Adding the ability to "Accept" and "Edit" disputes.
 - Added the ability to Edit a dispute by submitting a New response.
 - Added the ability to get a response to an individual dispute when a response has been successfully posted and does not include Accept.

November 1, 2018

Update

- API - Security Keys: System-generated API security keys will have a "Generate" button on first access instead of "Rotate".

October 19, 2018

New Features

- Disputes: Cancel button on dispute Edit modal, will no longer revert dispute status to "new".
- Disputes: Removing a document in an edit modal window, then selecting cancel will remove all the docs attached.
- Disputes: The Response Detail section will no longer appear when a dispute is in a new status.
- API - Disputes: GET Disputes will now pull all the new and changed disputes from midnight to midnight for the previous day, as well as any disputes that are changed up to the time the GET request is sent.

Update

- API - Disputes: Update dispute response - added support for response type CE11-CE14.

October 1, 2018

New Features

- Customer Vault: Billing cards and shipping addresses can be deleted from the modal window.

Update

- API - Dispute: Adding Dispute Status to the dispute report.

September 18, 2018

New Features

- Webhooks: Webhook requests can be secured by Basic Authentication.
- Webhooks: Only relevant webhooks will be displayed on the webhook configuration page.
- API - Payment Gateway: PG Receipt API can now take a logo URL. The logo will be included in the emailed receipt.
- API: Added a new API route to get Card Type (ARDEF) data*
- API - Account Updater: Added a new API route to submit and get Account Updater (AUS) requests and responses.*
- Account Updater: Added support for American Express cards.

Update

- Webhooks: Updated webhook to receive Account Updater (AUS) responses.

*Currently in BETA

September 10, 2018

New Features

- Webhooks: Added webhooks for Application and Transaction Status Updates.
- API: Added Acquirer ref num, Auth RRN, and AuthTran ID to reporting API for the transaction report.

Update

- API: Updated Customer Vault and Subscription API to support operations on behalf of merchants.

August 30, 2018

New Features

- Reports: Merchant batch history report will now display the terminal number when applicable.
- Qualpay Website: Customer support via chat has been added to Qualpay's main website, www.qualpay.com.

August 6, 2018

Update

- Invoice: The email history section of the Invoice Details page was only displaying email history for the previous week. We have corrected this behavior, and now all email history for an invoice will be displayed.

July 24, 2018

Update

- Qualpay Manager: When changing pages, the page will automatically scroll to the top.
- Reporting: Transaction detail of reports will now display 3DS response and MOTO/ECI values.
- Reporting: If present, the reference number will always be displayed in the "Deposit" tab of the transaction detail.
- Disputes: When responding to a dispute, added default toggle to enter the transaction manually when there is no record in the table for credit processed.
- Disputes: Added additional validation for reference number entered for credit processed on dispute modal. The number cannot be the number of the Dispute Detail - Original Transaction Data.
- Disputes: When responding to an invalid dispute, no other options are available, the description is required. "Description" is also now required for an arbitration response.

July 3, 2018

Update

- Invoice Settings: Changed button label from "Send Email Receipt" to "Send customer a copy of the email receipt".

June 19, 2018

New Features

- Virtual Terminal: updated card type validation so that JCB and International Diners card types are accepted if Discover Card type is enabled.
- API: Qualpay Profile ID added to Integrator API for merchant settings route.
- Sandbox: New MasterCard test cards available on Developer Portal for simulating transactions in the sandbox environment.
- Disputes: Updated Response Reason for Reason Code 11.X and removed the dispute amount field from "Edit" Dispute Response for V/DS Pre-Arb.

June 11, 2018

Feature and Functionality Removal

- Qualpay Manager: Internet Explorer 10 is no longer supported.
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