

ProCharge[®] Gateway User Guide

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Introduction

The **ProCharge® Gateway** online transaction processing system provides merchants with flexibility and user-friendly technology to conduct transactions, simplifying payment processing and saving money. Merchants can easily and securely process sales, create and send invoices, and view detailed business reports. ProCharge® Gateway integrates with **QuickBooks Online** (QBO), offering further flexibility in conducting business transactions.

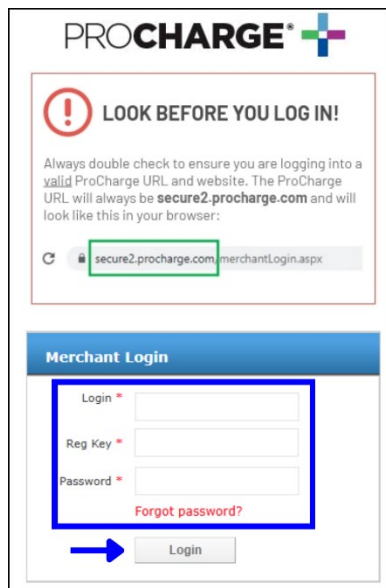
This document contains information about setting up and using ProCharge® Gateway. The exact layout of your ProCharge® environment may differ slightly from these instructions due to your account setup. Contact the [Technical Support Team](#) for assistance in configuring your dashboard.

Getting Started

Accessing the Dashboard

The ProCharge® Gateway dashboard is where the primary tabs are located.

1. Navigate to <https://secure2.procharge.com>.
 - Always double check to ensure you are logging into a valid ProCharge URL and website. The ProCharge URL will always be **secure2.procharge.com**.
2. In the **Merchant Login** section, enter the following:
 - **Login** – The user’s login name
 - **Reg Key** – The registration key provided by Customer Support
 - **Password** – The user’s password



3. Click **Login**.

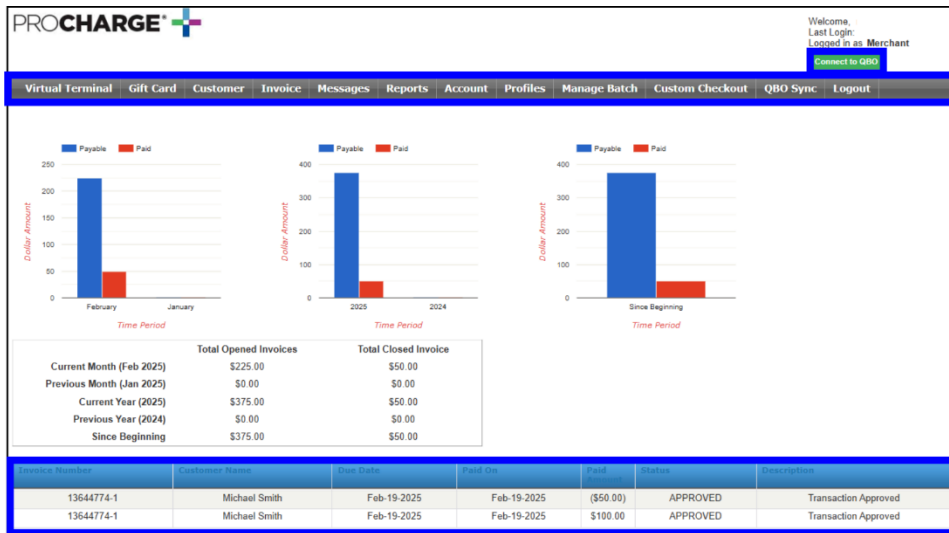
NOTE: Depending on your security settings, ProCharge® Gateway may require you to answer security questions before logging in.

Dashboard Functions

From the ProCharge® Gateway dashboard, merchants can view general sales and transaction data, and access the following tabs:

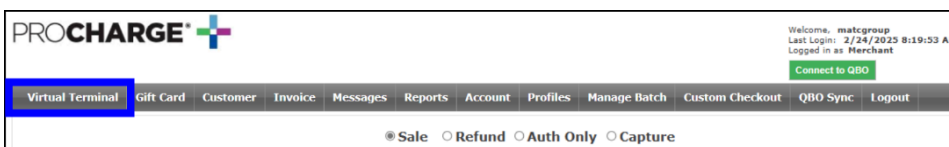
- Virtual Terminal
- Gift Card
- Customer
- Invoice
- Messages
- Reports
- Account
- Profiles
- Manage Batch
- Custom Checkout
- QBO Sync
- Logout

Recent invoice information is available in a table at the bottom, and a **Connect to QBO** button is in the upper right.



Virtual Terminal

Most day-to-day transactions are conducted through the **Virtual Terminal**. The terminal is organized into various sections and subsections.



Sale

Transactions are processed in the **Sale** section, where you can also display, enter, or adjust customer and payment details.

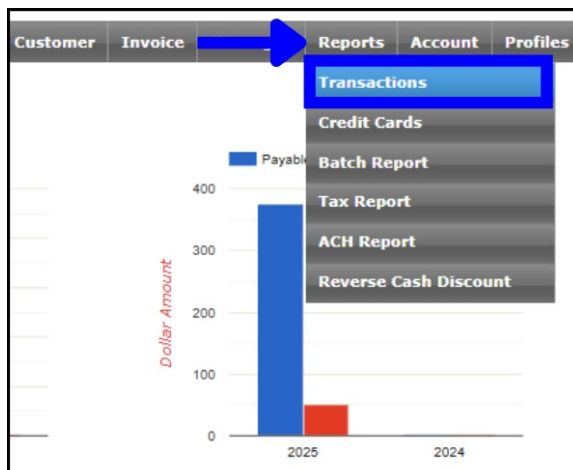
- **Customer Details** – Enter customer information into the optional fields
- **Payment Details** – Enter payment information into the required * fields

Refund

Full or partial refunds can be run from either the **Reports Screen** or the **Refund Screen**.

Full or Partial Refunds – From the Reports Screen

1. To process a full or partial refund, go to **Reports > Transactions**.



2. In the **Payment Report** section at the bottom of the page, click on the transaction to be refunded.
NOTE: Only transactions eligible for a refund will have an active link in the **Refund** column.

Payment Report

For: Page Size ▼

Due Date	Customer Name	Invoice Description	Application	Card Type	Card #	Type	Status	Transaction ID	Paid Amount	Refund
02/19/2025	Michael Smith	Sundries	Procharge Gateway	Cash		Refund	APPROVED	C20250219103628670	(\$50.00)	Refund
02/19/2025	Michael Smith	Sundries	Procharge Gateway	Cash		Sale	APPROVED	C20250219103628670	\$100.00	Refund

3. Enter the full or partial dollar amount in the **Amount To Refund** field and click **Process Refund**.

PROCHARGE®

Invoice Amount :	100.00
Previously Refunded :	
Amount To Refund :	100.00

Process Refund
Cancel

4. To see updated information about full or partial refunds, go back to **Reports > Transactions > Payment Report**.

Full or Partial Refunds – From the Refund Screen

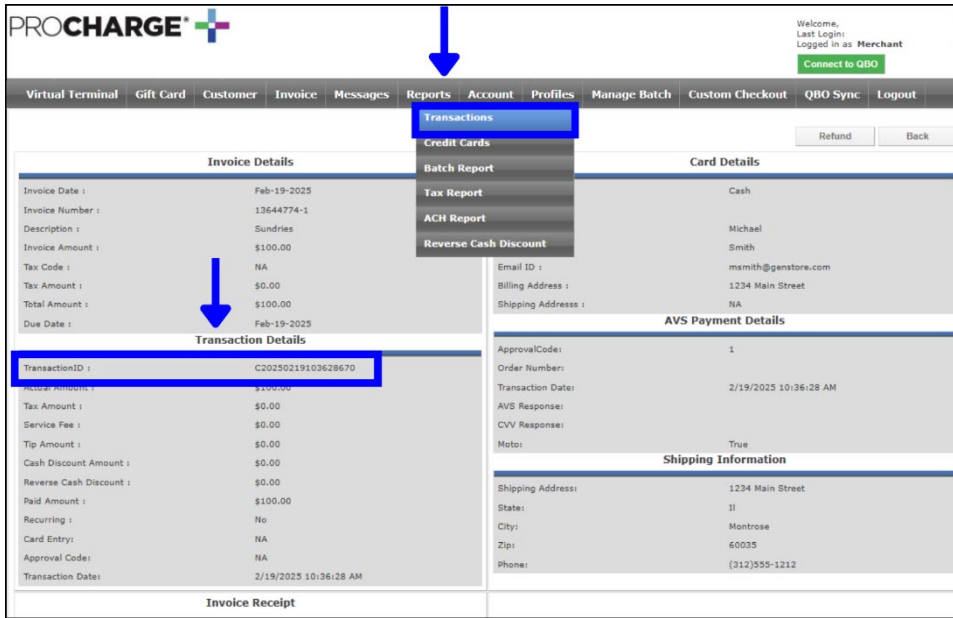
1. To initiate a full or partial refund from the Refund screen, you must first get the **Transaction ID** from **Reports > Transactions > Payment Report**.
2. In the **Payment Report** section, click anywhere in the selected invoice line for the item to be refunded. This will take you to the **Details** page.

Payment Report

For: Page Size ▼

Due Date	Customer Name	Invoice Description	Application	Card Type	Card #	Type	Status	Transaction ID	Paid Amount	Refund
02/19/2025	Michael Smith	Sundries	Procharge	Cash		Refund	APPROVED	C20250219103628670	(\$50.00)	
02/19/2025	Michael Smith	Sundries	Procharge Gateway	Cash		Sale	APPROVED	C20250219103628670	\$100.00	Refund

3. In the **Transaction Details** section, copy the **Transaction ID** number.



NOTE: You can also write down the Transaction ID from the line item in the **Payment Report** section and enter it manually.

4. Go back to the **Virtual Terminal** tab and click on the **Refund** button.
 - If you don't see the **Refund** button, contact the [Technical Support Team](#).
5. Paste or manually enter the **Transaction ID** number. The original transaction details will populate the required * fields.
6. Enter the full or partial **Amount** to be refunded.
7. Enter the **Payment Method**.
8. Click **Refund Now**.

The screenshot shows the Refund form in the ProCharge Gateway interface. At the top, there are radio buttons for Sale, Refund, Auth Only, and Capture. The 'Refund' radio button is selected. Below the radio buttons, there are several input fields: Transaction ID (C20250219103628670), Amount (50.00), Email Address (msmith@genstore.com), Payment Method (Cash), and Description (Sundries). The 'Refund Now' button is highlighted with a blue box. Blue arrows point to the 'Transaction ID' and 'Amount' fields.

9. To see updated information about full or partial refunds, go back to **Reports > Transactions > Payment Report**.

NOTE: Merchants will also receive an email with a copy of the refund receipt.

```

Refund

Cash

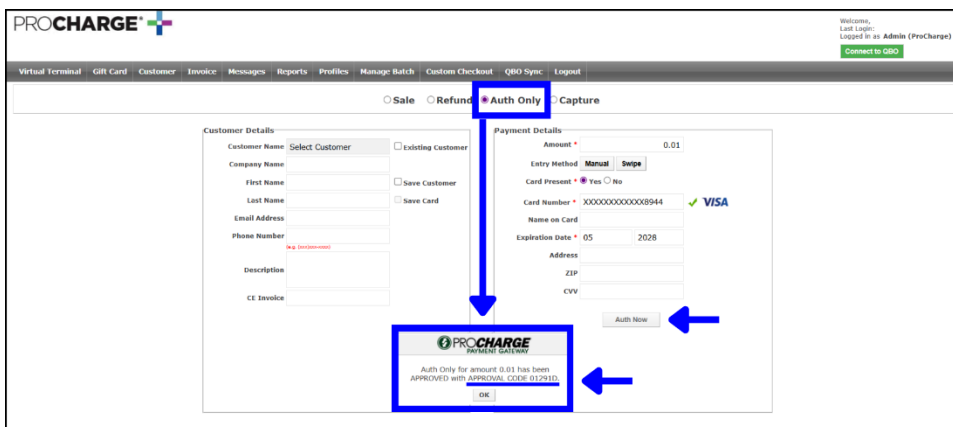
2/19/2025 12:07:39 PM
Entry Method      : Keyed
Invoice           : 13644774-1
Approval Code    : 1
Actual Amount     : $ 50.00
Tax Amount        : $ 0.00
=====
Amount Refunded: $ 50.00 ←
X
_____
Merchant Copy
Thank You!
    
```

Auth Only

Auth Only allows credit card pre-authorization

NOTE: **Auth Only** is deactivated by default. Please contact the [Technical Support Team](#) to have it activated.

1. To pre-authorize a credit card, select **Auth Only**.
2. Choose **Manual** or **Swipe** from **Entry Method** and fill in the required * fields.
3. Click **Auth Now**.
4. An **email receipt** with the authorization status will be sent to the merchant.

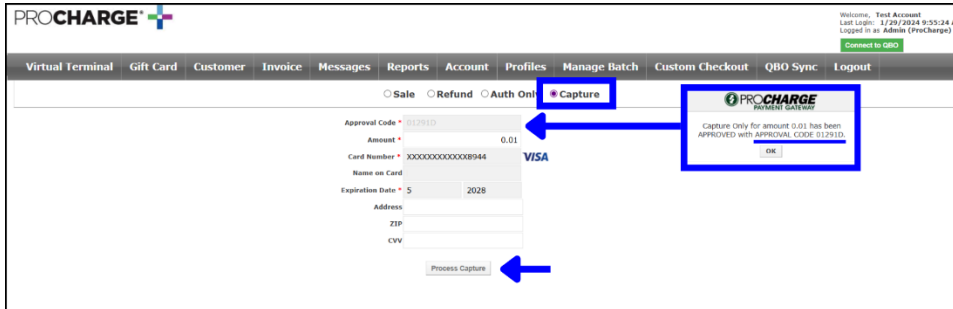


NOTE: Be sure to write down the approval code from the **Auth Only** confirmation message, as it will be needed during the following **Capture** procedure.

Capture

Close out a credit card authorization in the **Capture** section.

1. To finalize the transaction, select **Capture**.
2. Enter the **Approval Code** from the **Auth Only** transaction, along with the other required * information.
3. Click **Process Capture**.
4. An **email receipt** with the confirmation status will be sent to the merchant.

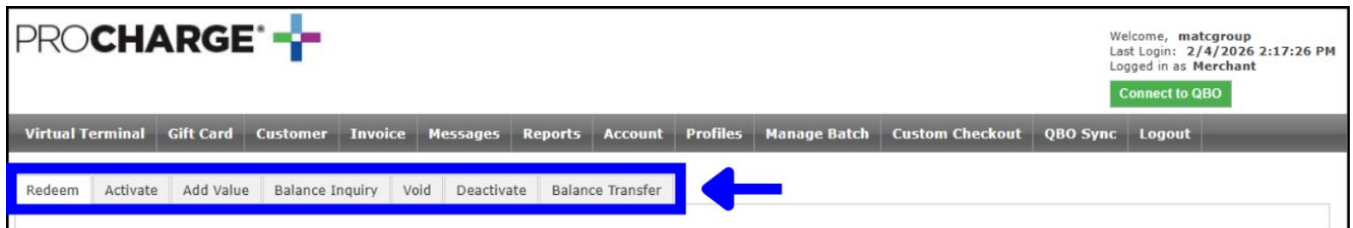


NOTE: Captures can only be run for authorizations originating from within the ProCharge® Gateway.

Gift Card

The **eGiftSolutions** functions can be managed from the **Gift Card** tab. Merchants can activate, deactivate, and add value to gift cards, as well as void transactions and conduct balance inquiries and transfers.

- **Required** – Information fields with * are required
- **Submit** – Complete and submit the transaction after manually entering the card number and amount
- **Swipe** – Swipe the eGiftSolutions card instead of manually entering the card number; when swiping cards, merchants must still enter an amount to apply from the card to a purchase amount



Redeem

To redeem an eGiftSolutions gift card, go to the **Redeem** tab and enter the following information:

- **Name on Card** – The name printed on the card
- **Card Number *** – The account number on the card
- **Amount (\$) *** – The dollar amount to debit from the card
- **Tax** – The checkbox to apply tax
- **QBOTax Rates** – Drop-down menu for QuickBooks Online tax rate options
- **Tax (%)** – The tax rate as a percentage
- **Total Amount *** – The total amount of the sale including tax

Activate

To activate an eGiftSolutions gift card, go to the **Activate** tab and enter the following information:

- **Name on Card** – The name printed on the card
- **Card Number *** – The account number on the card
- **Amount (\$) *** – The dollar amount to add to the card

Add Value

To add value to an already activated eGiftSolutions gift card, go to the **Add Value** tab and enter the following information:

- **Name on Card** – The name printed on the card
- **Card Number *** – The account number on the card
- **Amount (\$) *** – The dollar amount to add to the card

Balance Inquiry

To check the balance of an already activated eGiftSolutions gift card, go to the **Balance Inquiry** tab and enter the following information:

- **Name on Card** – The name printed on the card
- **Card Number *** – The account number on the card

Void

To void transactions made with an eGiftSolutions gift card, go to the **Void** tab and enter the following information:

- **Transaction ID** – The ID number of the transaction
- **Name on Card** – The name printed on the card
- **Card Number *** – The account number on the card

Deactivate

To deactivate an eGiftSolutions gift card, go to the **Deactivate** tab and enter the following information:

- **Name on Card** – The name printed on the card
- **Card Number *** – The account number on the card

Balance Transfer

To transfer all or part of the balance from one eGiftSolutions gift card to another, go to the **Balance Transfer** tab and enter the following information:

- **Debited Card Number *** – The account number of the card **from** which the balance is being transferred
- **Name on Card** – The name printed on the card
- **Card Number *** – The account number for the card **to** which the balance is being transferred
- **Amount (\$)** * – The dollar amount to transfer **from** the debited card **to** the receiving card

Customer

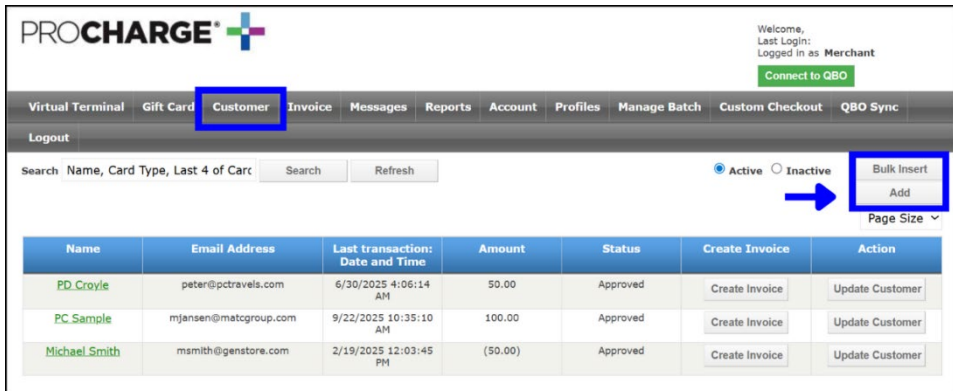
Under the **Customer** tab, merchants can create and manage a customer database. New customers can be added individually or imported via the **Bulk Insert** function. The **Customer** tab also allows merchants to update profile information and create invoices for saved customers.

The screenshot shows the PROCHARGE Gateway interface. At the top, there's a navigation bar with tabs: Virtual Terminal, Gift Card, **Customer** (highlighted), Invoice, Messages, Reports, Account, Profiles, Manage Batch, Custom Checkout, and QBO Sync. Below the navigation bar is a search area with a search bar and a 'Refresh' button. To the right of the search bar are radio buttons for 'Active' (selected) and 'Inactive', and a 'Bulk Insert' button. Below the search area is a table with the following data:

Name	Email Address	Last transaction: Date and Time	Amount	Status	Create Invoice	Action
PD_Croyle	peter@pctravels.com	6/30/2025 4:06:14 AM	50.00	Approved	Create Invoice	Update Customer
PC_Sample	mjansen@matcgroup.com	9/22/2025 10:35:10 AM	100.00	Approved	Create Invoice	Update Customer
Michael_Smith	msmith@genstore.com	2/19/2025 12:03:45 PM	(50.00)	Approved	Create Invoice	Update Customer

Create Customer

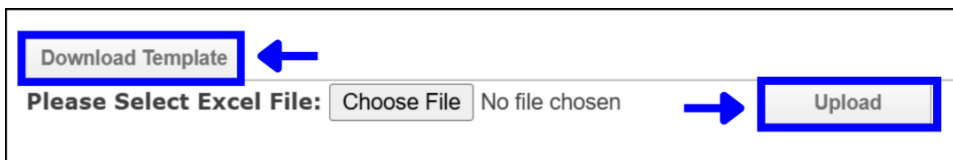
1. To add a single new customer, go to the **Customer** tab and click on **Add**.



2. Fill in the required * information, then click **Add**.

The screenshot shows a form for creating a new customer. It includes fields for Company Name, First Name (marked with a red asterisk), Last Name, Email Address (marked with a red asterisk), and Phone [Mobile]. There are radio buttons for Account Status (Active selected), Notification via (Email selected), and a toggle for Tax Exempt (set to No). A blue arrow points to the 'Add' button at the bottom.

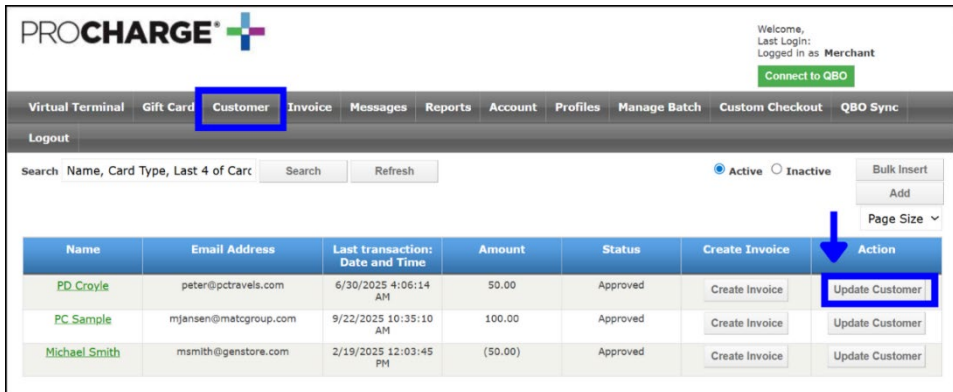
3. To add more than one customer, click on **Bulk Insert** and then **Download Template**.
4. Add customer names to the Excel template and save the document.
5. Select the completed Excel file from your computer, then click **Upload**.



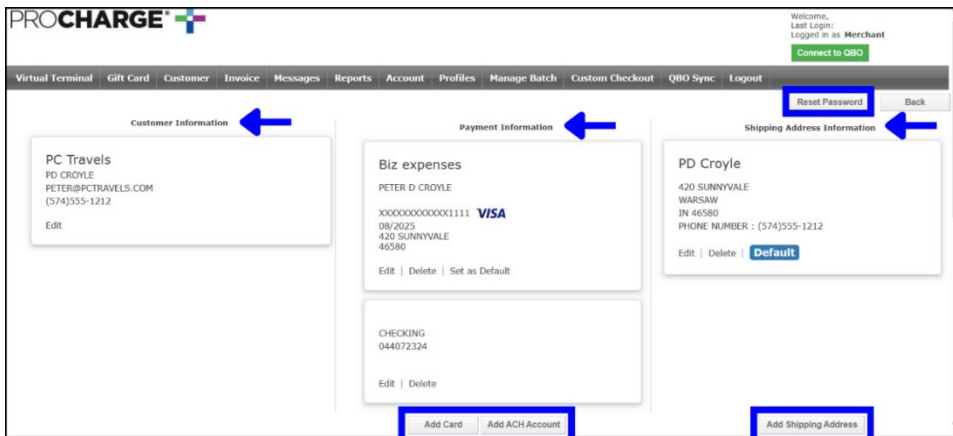
Update Customer Profile – Basic, Payment, and Shipping Address

From the **Update Customer** screen, you can add/update basic profile information, payment information, and shipping address information, as well as reset passwords.

1. In the **Customer** tab, locate the customer **Name**.
2. Click **Update Customer** in the **Action** column.



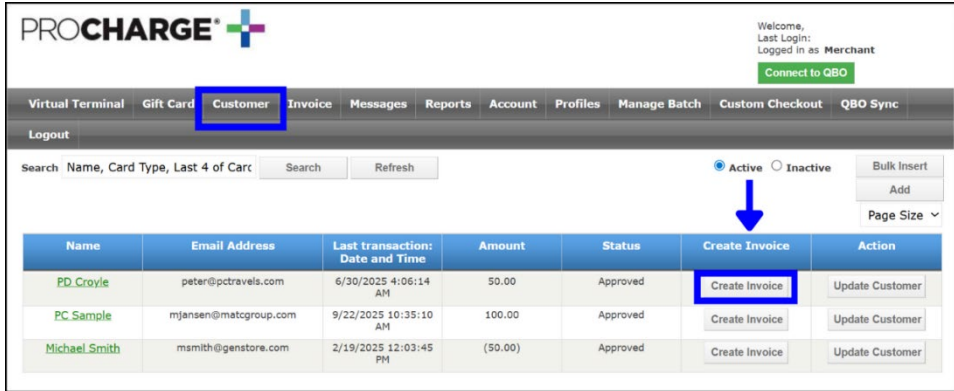
3. Edit the information by clicking in the specific section(s) on the screen and then clicking **Update** in the pop-up screen to save the changes. Editable sections include **Customer Information**, **Payment Information**, **Shipping Address Information**, and **Reset Password**.



Create Customer Invoices – New and Recurring

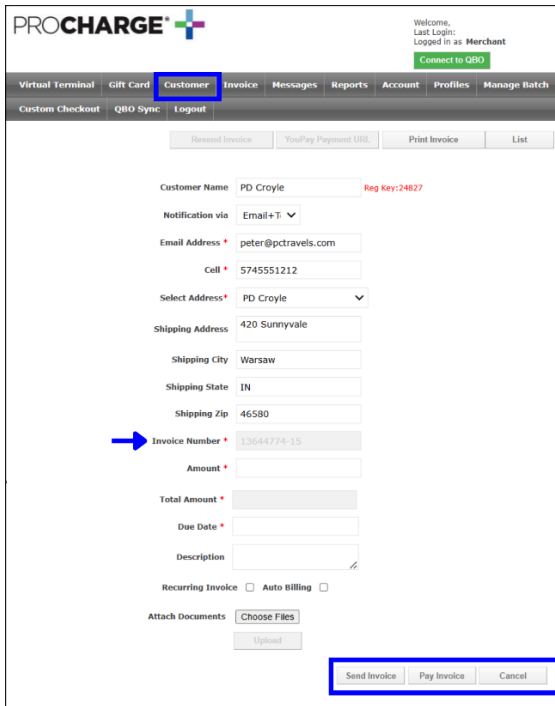
Customer invoices can be created under the **Customer** tab or the **Invoice** tab.

1. To create a customer invoice under the **Customer** tab, find the line item in the customer list.
2. Click **Create Invoice**.



3. Fill in the required * information.
4. Select **Recurring Invoice** and/or **Auto Billing** (as applicable), and attach documents if needed.
5. Select **Send Invoice**, **Pay Invoice**, or **Cancel**.

NOTE: To find the **Invoice Number**, go to **Reports > Transactions** and click on the **Transaction ID** number associated with the customer.



Invoice

Merchants can search, view, and add invoices under the **Invoice** tab, which includes invoice numbers, customer names, due dates and amounts, and other transaction data. Merchants can also process customer payments, issue single transaction refunds, and even perform a bulk import of multiple invoices.

Create an Invoice

To create an invoice under the **Invoice** tab:

1. Click on **Add Invoice** in the upper right corner.
2. Add the required * information (see *Create Customer Invoices – New and Recurring*, above).

Invoice Number	Customer Name	Profile Name	Due Date	Amount	Due Amount	Description	Recurring	Status	Source	
13644774-14	PC Sample	matcgroup	09/22/2025	\$100.00	\$0.00		No	Paid	Procharge Gateway	Refund Now
13644774-13	PC Sample	matcgroup	09/22/2025	\$50.00	\$0.00		No	Paid	Procharge Gateway	Refund Now
13644774-12	PC Sample	matcgroup	09/22/2025	\$50.00	\$0.00		No	Paid	Procharge Gateway	Refund Now
13644774-11	PD Croyle	matcgroup	08/09/2025	\$100.00	\$100.00	No Card.	Payment Starting from Mar-09-2025 to Feb-09-2026	Pending	Procharge Gateway	Pay Now
13644774-10	PD Croyle	matcgroup	08/09/2025	\$100.00	\$100.00	No Card.	Payment Starting from Mar-09-2025 to Feb-09-2026	Pending	Procharge Gateway	Pay Now
13644774-9	PD Croyle	matcgroup	07/09/2025	\$100.00	\$100.00	No Card.	Payment Starting from Mar-09-2025 to Feb-09-2026	Pending	Procharge Gateway	Pay Now
13644774-8	PD Croyle	matcgroup	04/30/2025	\$50.00	\$0.00	Travel gal...	Payment Starting from Mar-31-2025 to Dec-31-2027	Paid	Procharge Gateway	Refund Now
13644774-7	PD Croyle	matcgroup	06/09/2025	\$100.00	\$100.00	No Card.	Payment Starting from Mar-09-2025 to Feb-09-2026	Pending	Procharge Gateway	Pay Now
13644774-6		matcgroup	06/05/2025	\$0.01	\$0.01		No	Pending	Procharge Gateway	Pay Now
13644774-5	PD Croyle	matcgroup	05/09/2025	\$100.00	\$100.00	No Card.	Payment Starting from Mar-09-2025 to Feb-09-2026	Pending	Procharge Gateway	Pay Now
13644774-4	PD Croyle	matcgroup	03/31/2025	\$50.00	\$50.00	Travel gal...	Payment Starting from Mar-31-2025 to Dec-31-2027	Pending	Procharge Gateway	Pay Now
13644774-3	PD Croyle	matcgroup	02/28/2025	\$125.00	\$0.00	Recurring ...	Autobilling on Feb-28-2025	Paid	Procharge Gateway	Refund Now
13644774-2	PD Croyle	matcgroup	03/09/2025	\$100.00	\$100.00	Travel sup...	Payment Starting from Mar-09-2025 to Feb-09-2026	Pending	Procharge Gateway	Pay Now
13644774-1	Michael Smith	matcgroup	02/19/2025	\$100.00	\$50.00	Sundries	No	Pending	Procharge Gateway	Pay Now

Invoice Tab Functions

- **Search** – Search for an invoice by name, number, or keyword
- **Refresh** – Refresh invoice data
- **Add Invoice** – Add an invoice
- **Color Code Search** – Search by a color-coded status (Declined, No card, and Added by Admin)
- **Bulk Insert** – Add multiple invoices by uploading an Excel file

Invoice Tab Data

- **Invoice Number** – The invoice/quote number
- **Customer Name** – The customer name
- **Profile Name** – The profile name (can match the **Customer Name**)
- **Due Date** – The date the invoice is due
- **Amount** – The amount of the invoice
- **Due Amount** – The amount the customer still owes
- **Description** – The description of the transaction
- **Recurring** – Provides status and information about recurring invoices
- **Status** – The invoice status (**Pending**, **Paid**, or **Refunded**)
- **Source** – The device from which the transaction was conducted
- **Pay Now/Refund Now** – Use **Pay Now** to process a payment or **Refund Now** to issue a refund

Processing Invoice Payments

1. In ProCharge®, select the **Invoice** tab.
2. Click **Pay Now** for the desired invoice.

Invoice Number	Customer Name	Profile Name	Due Date	Amount	Due Amount	Description	Recurring	Status	Source	
13644774-14	PC Sample	matcgroup	09/22/2025	\$100.00	\$0.00		No	Paid	Procharge Gateway	Refund Now
13644774-13	PC Sample	matcgroup	09/22/2025	\$50.00	\$0.00		No	Paid	Procharge Gateway	Refund Now
13644774-12	PC Sample	matcgroup	09/22/2025	\$50.00	\$0.00		No	Paid	Procharge Gateway	Refund Now
13644774-11	PD Croyle	matcgroup	09/09/2025	\$100.00	\$100.00	No Card	Payment Starting from Mar-09-2025 to Feb-09-2026	Pending	Procharge Gateway	Pay Now
13644774-10	PD Croyle	matcgroup	08/09/2025	\$100.00	\$100.00	No Card	Payment Starting from Mar-09-2025 to Feb-09-2026	Pending	Procharge Gateway	Pay Now
13644774-9	PD Croyle	matcgroup	07/09/2025	\$100.00	\$100.00	No Card	Payment Starting from Mar-09-2025 to Feb-09-2026	Pending	Procharge Gateway	Pay Now
13644774-8	PD Croyle	matcgroup	06/30/2025	\$50.00	\$0.00	Travel gal...	Payment Starting from Mar-31-2025 to Dec-31-2027	Paid	Procharge Gateway	Refund Now
13644774-7	PD Croyle	matcgroup	06/09/2025	\$100.00	\$100.00	No Card	Payment Starting from Mar-09-2025 to Feb-09-2026	Pending	Procharge Gateway	Pay Now
13644774-6	matcgroup	matcgroup	06/05/2025	\$0.01	\$0.01	No	No	Pending	Procharge Gateway	Pay Now
13644774-5	PD Croyle	matcgroup	05/09/2025	\$100.00	\$100.00	No Card	Payment Starting from Mar-09-2025 to Feb-09-2026	Pending	Procharge Gateway	Pay Now
13644774-4	PD Croyle	matcgroup	03/31/2025	\$50.00	\$50.00	Travel gal...	Payment Starting from Mar-31-2025 to Dec-31-2027	Pending	Procharge Gateway	Pay Now
13644774-3	PD Croyle	matcgroup	02/28/2025	\$125.00	\$0.00	Recurring ...	Autobilling on Feb-28-2025	Paid	Procharge Gateway	Refund Now
13644774-2	PD Croyle	matcgroup	01/09/2025	\$100.00	\$100.00	Travel sup...	Payment Starting from Mar-09-2025 to Feb-09-2026	Pending	Procharge Gateway	Pay Now
13644774-1	Michael Smith	matcgroup	02/19/2025	\$100.00	\$50.00	Sundries	No	Pending	Procharge Gateway	Pay Now

3. Select a **Payment Method** from the drop-down menu.
4. Click **Pay Now**.

Customer

Invoice Date Jun-05-2025

Invoice Number 13644774-6

Description

Invoice Amount \$ 0.01

Due Date Jun-05-2025

Payment Method * Select ▼

- Select
- Credit Card
- Gift Card
- Cash
- ACH

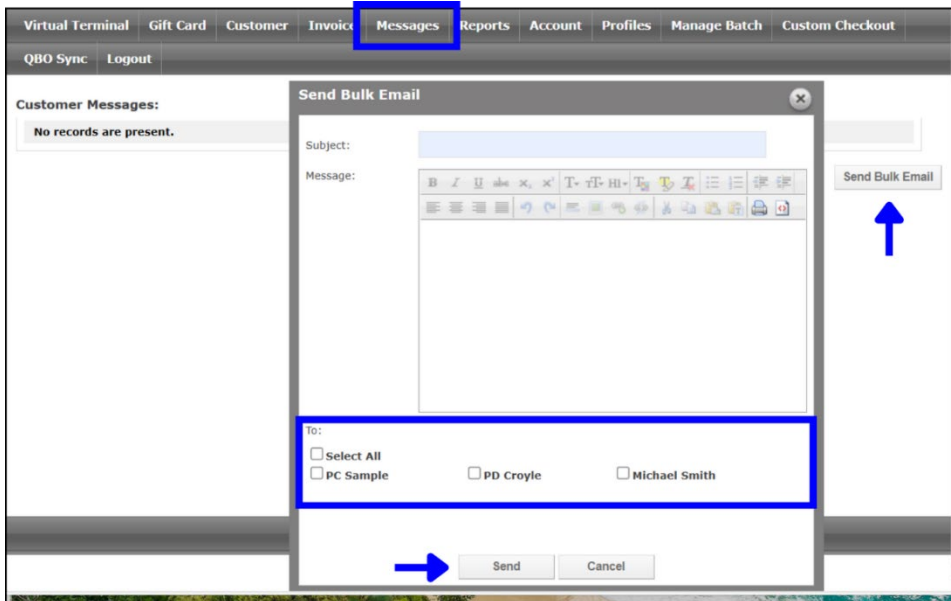
[Pay Now](#) [Cancel](#)

Messages

Merchants can send individual messages or bulk emails to customers in the **Messages** tab.

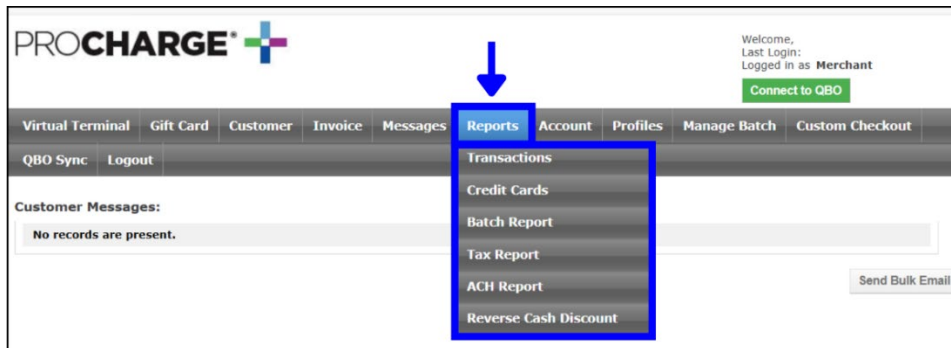
1. Click **Send Bulk Email**.
2. Fill in the **Subject** and **Message**.

3. Choose **Select All** or individual customer names, then click **Send**.



Reports

Merchants can generate reports and review various business reports under the **Reports** tab.



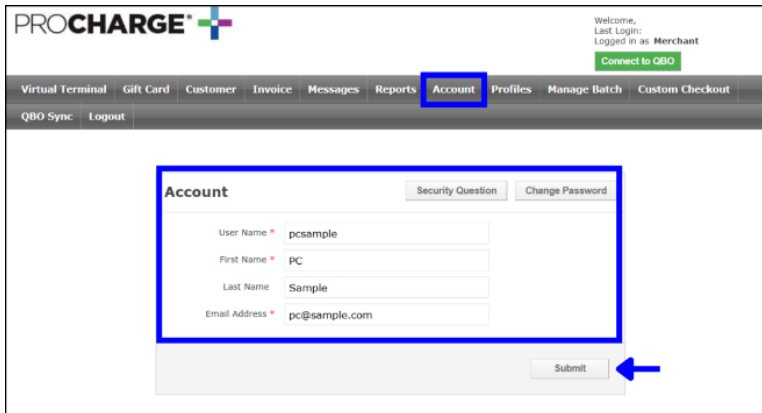
- **Transactions** – Select a report to view details about an individual transaction, including **Invoice Details, Transaction Details, Card Details, AVS Payment Details, and Shipping Information**
- **Credit Cards** – View reports about individual credit card transactions
- **Batch Report** – Search for batch reports by entering the batch close date
- **Tax Report** – Generate various tax reports by date or tax rate
- **ACH Report** – View reports about ACH transactions
- **Reverse Cash Discount** – Generate reports of transactions where reverse cash discounts/admin fees were applied

Account

Under the **Account** tab, merchants can change usernames, account passwords, and security questions.

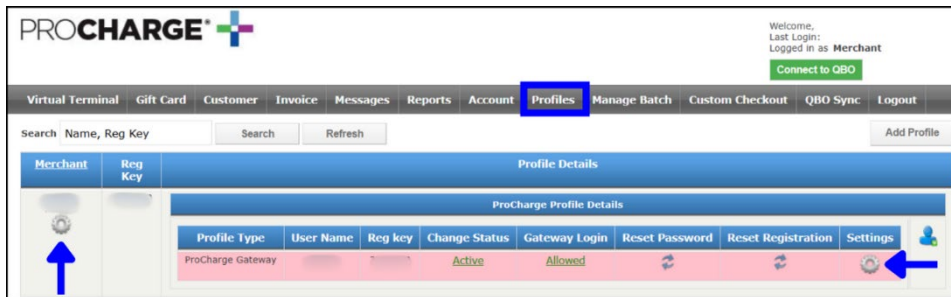
NOTE: Account tab access is admin-only.

1. Fill in or edit the required * fields.
2. Click **Submit**.



Profiles

Under the **Profiles** tab, merchants can enable or disable a wide variety of admin settings or add new profiles. **NOTE: Profile** tab access is admin-only.



The **Profiles** page will display the following in the **ProCharge Profile Details** section:

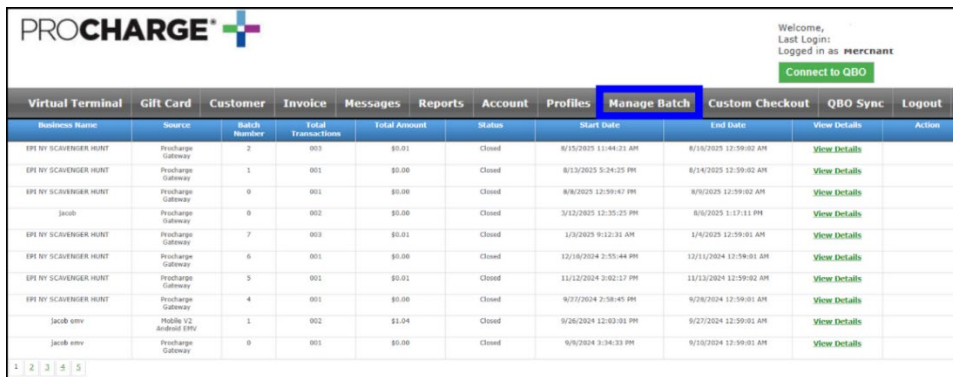
- Merchant Name
- Profile Type
- User Name
- Registration Key
- Change Status
- Gateway Login
- Reset Password
- Reset Registration
- Settings

Click on the **Gear** icon (in either the **Merchant** or **Settings** columns) to display a page where the following admin functions and settings can be configured:

- Profile Images
- General Settings
- Admin Fees
- Cash/ACH Discount
- Display Name
- Batch Report Emails
- Gift Card
- Tax
- General AVS Response

Manage Batch

Under the **Manage Batch** tab, merchants can view open batches and close batches manually.



Business Name	Source	Batch Number	Total Transactions	Total Amount	Status	Start Date	End Date	Action
EPI BY SCAVENGER HUNT	Procharge Gateway	2	003	\$0.01	Closed	8/30/2025 11:44:21 AM	8/30/2025 12:59:02 AM	View Details
EPI BY SCAVENGER HUNT	Procharge Gateway	1	001	\$0.00	Closed	8/13/2025 5:24:25 PM	8/14/2025 12:59:02 AM	View Details
EPI BY SCAVENGER HUNT	Procharge Gateway	0	001	\$0.00	Closed	8/9/2025 12:59:47 PM	8/9/2025 12:59:02 AM	View Details
Jacob	Procharge Gateway	0	002	\$0.00	Closed	3/12/2025 12:35:25 PM	8/6/2025 1:17:11 PM	View Details
EPI BY SCAVENGER HUNT	Procharge Gateway	7	003	\$0.01	Closed	1/9/2025 9:12:31 AM	1/9/2025 12:59:01 AM	View Details
EPI BY SCAVENGER HUNT	Procharge Gateway	6	001	\$0.00	Closed	12/18/2024 2:55:44 PM	12/11/2024 12:59:01 AM	View Details
EPI BY SCAVENGER HUNT	Procharge Gateway	5	001	\$0.01	Closed	11/12/2024 3:02:17 PM	11/13/2024 12:59:02 AM	View Details
EPI BY SCAVENGER HUNT	Procharge Gateway	4	001	\$0.00	Closed	9/27/2024 2:58:45 PM	9/28/2024 12:59:01 AM	View Details
Jacob emv	Mobile V2 Android EMV	1	002	\$1.04	Closed	9/26/2024 12:03:03 PM	9/27/2024 12:59:02 AM	View Details
Jacob emv	Procharge Gateway	0	001	\$0.00	Closed	9/9/2024 3:34:33 PM	9/10/2024 12:59:01 AM	View Details

Columns can be sorted by:

- Business Name
- Source
- Batch Number
- Total Transactions
- Total Amount
- Status
- Start and End Dates
- Actions

Batch-specific details can be accessed from the **View Details** column. Click on an individual transaction to see the following details:

- Receipts and Invoice
- Transaction
- Card
- AVS Payment
- Address/Zip
- Card Code Verification
- Shipping

Payment Report

Date: Nov 21, 2025
Time: 10:00:33 AM
For: IMPACT 2025

Invoice #	Profile Name	QB Invoice #	Paid Date	Due Date	Customer Name	Invoice Description	Order Name	Order Address	Application	Card Type	Card #	Type	Status	Transaction ID	Paid Amount	Refund
1862516-17	Impact01		11/18/2025 1:58:03 PM	11/18/2025	CARDMEMBER/ISSCOVER	Testing note			Mobile V2 Q25 EMV	Discover	6442	Card	APPROVED	05277034830801	\$1.53	Refunded
	Impact01		11/18/2025 7:28:45 PM	11/18/2025					Mobile V2 Q25 EMV	Visa	8757	Card	APPROVED	355314011098123_1	(\$1.53)	Refunded
	Impact01		11/18/2025 7:28:29 PM	11/18/2025					Mobile V2 Q25 EMV	Visa	8757	Card	APPROVED	355314011098123	\$1.53	Refunded

Custom Checkout

Under the **Custom Checkout** tab, merchants can generate a checkout page where customers rather than merchants can perform checkout functions via YouPay. Merchants may choose standard green, blue, or black checkout pages, or customize one according to brand standards or special functions. For example, a merchant participating in charity fundraiser can add a **Donate Here** call-to-action button to the checkout page. Checkout URLs can be generated via the **Copy Checkout URL** button.

NOTE: Custom Checkout is deactivated by default. Please contact the [Technical Support Team](#) to have it activated.

The screenshot shows the 'Custom Checkout' configuration page. At the top, there are navigation tabs: Virtual Terminal, Gift Card, Customer, Invoice, Messages, Reports, Account, Profiles, Manage Batch, **Custom Checkout**, QBO Sync, and Logout. Below these are buttons for Checkout, Checkout, Checkout, and **Custom** (highlighted with a blue arrow). The main area contains a code editor with HTML code for a button: `<input type='button' id='BtnCustom' style='cursor:pointer;word-wrap:break word; white-space: normal; height: 50px; width: 150px; background-color: rgb(15, 172, 131); font-family: Verdana; font-weight: bold; color: rgb(255, 255, 255); border-style: none; value='Donate Here' onclick='\"javascript:var myWindow=window.open(\"https://secure3.procharge.com/YouPay/view/youpay.dll?D=VSkexVWOSIdzDJa13+BvekdsNB+2sm3UCRmxzyhs1=`. To the right is a configuration panel for the button, with fields for Amount, Width* (150), Height* (50), Button Text* (Donate Here), and Color (#0facb3). Below the code editor are two buttons: **Donate Here** and **Copy Checkout URL** (both highlighted with blue arrows). The bottom section is titled 'Merchant Custom Settings' and includes fields for Business Name, Business Address, Business Phone, Business Contact Email, Business Custom Message, and Business Logo, along with a 'Save' button.

QBO Sync

Using features in the **QBO Sync** tab, merchants can sync ProCharge® Gateway transactions with QuickBooks Online. Once ProCharge® and QBO sync, ProCharge® can automatically send invoice emails to customers, who can make payments online.

Set Up QBO Integration

1. Tap the **QBO Sync** tab.
2. Choose to sync **QBO to Procharge** or **Procharge to QBO**, add a date range, and click **Submit**.
3. If you have not already connected to QBO, you will be prompted to click the green **Connect to QBO** button in the upper right corner of the screen.

4. Select each checkbox to verify the checklist items have been completed, then tap **OK**.
5. The **QuickBooks Online** sign in page will appear.
6. Enter the **Email or User ID**, and click **Sign In**.