

Migration Instruction Guide

This reference guide provides step-by-step migration instructions for clients and their partners on how to migrate from the ChargeLogic Connect features which will no longer operate as of **September 30, 2024**.

Prerequisites for migration eligibility

- Must be on a supported version of Microsoft Business Central (SaaS or On-Premise) at the time of migration
 - The list of supported Business Central versions can be found on Microsoft's site here, along with the date on which mainstream support ends: <https://learn.microsoft.com/en-us/dynamics365/business-central/dev-itpro/terms/lifecycle-policy-on-premises>
- Must be leveraging Versapay Merchant Services

Migration instructions

Step 1: Upgrade to the latest version of Versapay ERP Payments for Microsoft Business Central

- If your company is not on the latest version of Microsoft Business Central SaaS, uninstall the existing version and install the latest available in Microsoft Appsource.
- If using on-premise, apply the latest app version available for download by our Partners on our website. Follow Microsoft's documentation for upgrading on-premise apps.

Step 2: Sign up for Versapay Merchant Services

- Contact brendan.hickey@versapay.com to apply.
 - Note: If you choose not to move to Versapay Merchant Services, you will need to discontinue usage of Connect.
- Existing Versapay merchant services clients using First Data / Fiserv will be eligible to keep their merchant accounts.

Step 3 : Follow the steps outlined below for each of the features your company uses today to migrate to the latest Versapay product.

FROM: Secure Remote Storage
TO: New Product - Versapay Tokens
<p>If you choose to upgrade:</p> <ul style="list-style-type: none"> • If using Secure Remote Storage, use the Versapay-provided migration tool to convert your Connect tokens to Versapay tokens before the sunset date. • You must first set up the VPYNETWORK Gateway account in full to enable the synchronization to the Versapay Network. • Complete <i>bulk upload</i> of Customers. • How to Switch to Versapay Tokens article

FROM: Connect E-Commerce
TO: New Product - Versapay E-Commerce
<p>If you choose to upgrade:</p> <ul style="list-style-type: none"> • SDKs available for Magento 2 and WooCommerce and can be sent via email upon request. • Partners like Sana, Dynamics eShop, DynamicWeb, and Commerce Build have their own integrations – please talk to those partners for migration information and instructions. • APIs are available for custom integrations with Versapay E-Commerce. The associated documentation can be found at https://developers.versapay.com/ecommerce. • If your current system has ChargeLogic Connect Secure Remote Storage tokens that you keep on file for customers, you may need to collect new payment methods from your customers when you migrate, as we do not have a tool to migrate tokens outside of Business Central. • How to Switch to Versapay Tokens article

FROM: Connect Click-To-Pay

TO: New Product – [Versapay PayNow for ERP Payments](#)

If you choose to upgrade:

- We recommend you cancel any outstanding Click-to-Pay links to prevent your customers from trying to pay via the old link.
- From the Sales Order or Posted Sales Invoice, use the Action > Function > Cancel Electronic Payment Request. Note, this will not delete the e-mail that was sent to the customer, it will simply make the embedded link unavailable.
- To send out new PayNow links, use the bulk customer upload tool and then the bulk invoice upload tool to send out new links from Versapay PayNow.

FROM: Connect Payment Portal

TO: New Product: [Versapay Customer Portal](#) or [Versapay Collaborative AR](#)

If you choose to upgrade:

- We recommend you cancel any outstanding Click-to-Pay links (described above in the “FROM: Click-To-Pay” section).
- Use the bulk customer upload tool and then the bulk invoice upload tool to send out new links from Versapay PayNow.

FROM: Connect Gift Cards

TO: New Product: Versapay Gift Cards

If you choose to upgrade:

- We will need to coordinate moving your list of open gift cards and their balances to the Versapay Gift Card platform from ChargeLogic Connect.
- You will need to select a cutover date near your go-live date, so we can move the balances to the new service and disable Gift Cards via Connect.
- The date you choose must be close enough to your go-live that the balances on outstanding cards will not change between these activities.
- To do this, please **submit a request on our [Contact Us](#) support page online one week before your desired cutover date.**