Offboarding Instruction Guide

The following ChargeLogic Connect features will be sunset on **September 30, 2024**, and will no longer be available for use after this date.

If you will not be migrating to the latest Versapay products, please follow the steps outlined below to offboard each of the features your company uses today. You may need support from your Partner for some of these actions.

Failure to take action can result in the loss of all saved cardholder data and the ability to process payments <u>outside of your ERP</u>. If you have not already started planning for this transition, you need to do so immediately.

The changes described in this document DO NOT impact the ERP Payments functionality inside your ERP. That will continue to function as expected. Only the features specifically called out below are being deprecated.

Product: Secure Remote Storage
• Detokenize and switch to Encrypted Storage by changing the Data Protection Type to Encrypted Storage.   Note: this process retrieves each card individually into the ERP and encrypts it in a PCI-compliant fashion. If your solution is hosted, check with your solution provider to ensure they can host this data securely. This process takes several seconds PER record, so this process is completely dependent on the number of credit card records you have stored. You can run through various deletion and cleanse processes to streamline the amount of data to be retrieved.

Product: Connect E-Commerce
If you choose to discontinue usage: • Find a new solution

Product: Click-to-Pay

If you choose to discontinue usage:

- Cancel any outstanding Click-to-Pay links before September 30, 2024.
- From the Sales Order of 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.
- You will need to find another solution (Versapay's Collaborative AR solution with a file-based integration can solve for this).

Product: Connect Payment Portal

If you choose to discontinue usage:

- Cancel any outstanding Click-to-Pay links before the sunset date
- From the Sales Order of 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.
- You will need to find another solution (Versapay's Collaborative AR solution with a file-based integration can solve for this).

Product: Connect Gift Cards

If you choose to discontinue usage:

- You will need to find another solution or evaluate using internal (LOOPBACK) gift cards.
- Please reference the Gift Card documentation for more information on setting up the internal gift card solution.
- We will provide you with a list of active gift card numbers and their current balances upon request **until the sunset date of September 30, 2024.** Your volume of gift card payments should dictate when you request this list. If you accept gift card payments daily, you'd likely want the list of active gift card numbers the last day before your cut-over. If you rarely accept gift cards, you can likely request the list earlier, as the likelihood of the balances changing is low.
- Please tell us what date you would like this file to be generated for, and then we will disable the gift card functionality on Connect.
- To do this, please **submit a request on our Contact Us support page online one week before your desired cutover date.**