


This document lists the training programs available regarding operation and maintenance of the Unipay Gateway.

Each program is designed for a specific team that will work with the gateway. We have identified the following teams:

- Boarding – responsible for merchant configuration and onboarding.
- Reconciliation – responsible for configuration, monitoring and auditing of the merchant funding and remittance process.
- Network – responsible for infrastructure items such as server configuration, releases and patches deployment, firewall and network rules and related tasks.
- QA – responsible for acceptance testing of the gateway functionality after releases and patches.
- PM – responsible for the Unipay Gateway project on the client's side.
- Merchant Services Support – responsible for support of merchants and answering their requests.
- Integrations Support – responsible for technical support of new integrations on the client's side.

The following training programs are available for new clients:

1. Gateway Overview – This training gives a general overview of Unipay Gateway functionality. The following topics will be covered: your company's needs and how they can be met with gateway tools, how the UI is organized, how to navigate different perspectives and the purpose of each one, the main modules you can use and so on. **Required participants: ALL**
2. Merchant Onboarding – This training covers all possible ways and forms for merchant onboarding, including how the onboarding API request and form work, how to modify the processing settings, how to manage accounts selection and work with it and so on. **Required participants: Boarding team, Merchant Services Support, Integrations Support, QA, PM**
3. User Management – This training provides information on the different user types (human and service) and their creation, what permissions can be applied to a specific user, how to modify the user access policy, how to connect users to a merchant, reseller or portfolio and so on. **Required participants: Boarding team, Merchant Services Support, Integrations Support, QA, PM**
4. Transaction Processing – This training gives you more knowledge on transaction processing via UI and API, how to configure and use HPP, the main transaction requests and their responses, different processing profiles and so on. **Required participants: Boarding team, Reconciliation team, QA team, PM**
5. Remittance Processing – This training offers insights on how remittance works and the main settings needed for it, how to configure fees and work with statements and so on. **Required participants: Boarding team, Reconciliation team, QA team, PM**
6. Terminal Management – This training describes the terminal workflow, teaches you how to define proper terminal settings on the UI, explains what configuration is needed for terminal orders and swaps, shows how to create and send terminal orders, how to check terminal logs and the diagnostics guide and so on. **Required participants: Boarding team, Integrations Support, QA team, PM**

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7. Recurring Billing – This training familiarizes you with the recurring billing process: what setup is needed (billing cycles, billing profiles, billings), how to create and freeze payment plans, how invoices and claims work, how to create customers, how to work with the customer portal and so on. **Required participants: Boarding team, Merchant Services Support, Integrations Support, QA team, PM**
  
  8. Reporting – This training is designed to show you all available reports and how to work with them via UI/API. **Required participants: Boarding team, Merchant Services Support, Integrations Support, Reconciliation team, QA team, PM**
  
  9. Production Audit – This training gives an overview of the internal audit system, which is the gateway's immune system designed to detect and catch issues that can occur during transaction processing. **Required participants: Boarding team, Integrations Support, Network team, QA team, PM**

The time-slots for trainings are 10 am -11 am EST, 11 am - 12 pm EST, 12 pm - 1 pm EST, Mon-Fri. You can make your selection on the form.

Request any training program by following this link <https://data.gatewayaid.com/view.php?id=40750>

While preparing for any session, please think about the use cases specific for your company. We will review them before the training and add them to the agenda. This will make the process of acquaintance with the Unipay Gateway more productive and better aimed at your needs.

For example, for onboarding training we would need to know what kind of merchants you work with -- retail or ecommerce – and what type of processing they would like to have. For user management, we need to understand what hierarchy you have with the merchants and what permissions are needed for users. For recurring billing, we would need to know if you work on monthly or weekly agreements, what payment plans you have for billing and so on.