
PrintSmith Vision® Productivity Suite
Version 6.2.1

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CREDIT CARD INTEGRATION GUIDE



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ePS Productivity Suite | PrintSmith Vision Credit Card Integration Guide

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Introduction

PrintSmith Vision supports integration with the USAePay and CardConnect payment gateway. This guide is for those implementing integrated credit card processing in PrintSmith Vision for the first time.

The guide assumes PrintSmith Vision is already installed and set up, and focuses on the tasks an administrator must complete to configure credit card processing and integrate PrintSmith Vision with USAePay and CardConnect. The guide also provides information about how credit card transactions are processed once the integration is in place.

Contact Information

ePS Support

Web Site:	https://communities.efi.com
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UK Phone:	+44 (0) 800.783.2737
EU Phone:	+49.2102.745.4500
E-Mail:	Printsmith.support@efi.com

Regular USA Service Desk hours are 8:00 am to 5:00 pm Mountain Standard Time, Monday – Friday.

Regular European Service Desk hours are 9:00 am to 5:15 pm Greenwich Mean Time (British Summer Time during summer), Monday – Friday.

Note For problems involving infrastructure (i.e., computers, networks, operating systems, backup software, printers, third-party software, etc.), contact the appropriate vendor. ePS cannot support these types of issues.

Introduction

About PCI Compliance

The Payment Card Industry (PCI) Payment Application Data Security Standard (PA-DSS) defines what an application that accepts credit cards must do to minimize the potential for security breaches.

As of version 5.0, PrintSmith™ Vision provides secure credit card processing through its integration with USAePay and CardConnect. All credit card information is entered in a secure form with the payment gateway providers taking care of the safety of the transactions. No credit card information is entered or stored in PrintSmith Vision.

How PrintSmith Vision Credit Card Integration Works

To keep credit card information secure (and adhere to PCI compliance), no credit card information is stored in PrintSmith Vision at any time. All credit card processing takes place through integration with the payment gateway providers, which takes care of the security and safety of your credit card transactions.

PrintSmith Vision allows secure payment transactions via USAePay and CardConnect.

- Credit card transactions (for example, in the cash register or when posting payments) are *initiated* from PrintSmith Vision.
- When you indicate in PrintSmith Vision that a credit card is to be used for payment, a request is sent to payment gateway provider, i.e., USAePay or CardConnect.
- If you are dealing with a customer in person and have a scanner, you can swipe the credit card. Otherwise, you can type the card information. For USAePay, a secure payment form opens (in a new browser window or on a new tab, depending on the browser you are using).
- When a credit card transaction is approved or declined, this information is requested by PrintSmith Vision. The status of all transactions (successful, declined, and so on) is available in the Credit Card Manager window in PrintSmith Vision.

About This Guide

This guide is for those implementing integrated credit card processing in PrintSmith Vision for the first time.

The guide assumes PrintSmith Vision is already installed and set up, and focuses on the tasks an administrator must complete to configure credit card processing and integrate PrintSmith Vision with USAePay and CardConnect. The guide also provides information about how credit card transactions are processed once the integration is in place.

Additional Sources

For information about	See
Installing PrintSmith Vision	<i>PrintSmith Vision Installation and Upgrade Guide</i>
Setting up and using PrintSmith Vision	<i>PrintSmith Vision User Guide</i>

Getting Started

Credit Card integration with PrintSmith Vision enables you to receive payments and deposits using the customer's credit card. You can also receive a payment for an invoice, receive an on-account payment, generate a refund, or void a transaction.

PrintSmith Vision integrates with the following payment gateway providers:

- USAePay
- CardConnect

You must have a merchant account with the payment gateway providers – USAePay and CardConnect to process credit cards from PrintSmith Vision.

Setting up USAePay

To use PrintSmith Vision with USAePay you must:

- Work with Bristol Pay, as the only AGI selected payment solution, to start the process of establishing your USAePay merchant account and to purchase a scanner (if you want to swipe cards).
- Configure PrintSmith Vision to work with USAePay.

Task 1: Establish USAePay Account and Purchase Scanner

The first step is to establish a merchant account with USAePay. As part of setting up an account you will establish a username and password for logging into the USAePay site, as well as a PIN. After you have a username and password, you must log into USAePay and obtain the two source keys that you will later enter in PrintSmith Vision.

About the source keys

A source key controls which secure form is displayed for entering credit card data. When using USAePay for credit card processing, two kinds of secure forms can be displayed: one for credit card payments and one for saving credit card information for a contact. If the same source key is used for both activities, the same form is displayed. If you use two different source keys, however, you can have two different forms if needed.

Establish your USAePay account

1. To get started, contact **Bristol Pay** at:
877-338-8112 and select option **1** for **Sales**.
Bristol Pay will assist you with the process of obtaining a merchant account.
2. Go to the login screen on the USAePay site: www.usaepay.com/login.
3. Enter the **Username** and **Password** for your account and click **Login**.
4. Once you are logged in, click **Settings** on the menu panel.
5. Click **API (Source) Keys**.
6. Copy the first source key to the clipboard (or write it down) so you can use it to configure PrintSmith Vision in the next task.



Name	Key	Disabled	Pin
Reseller Key	R:G3n16oG1hAJ1ObS19ao029iIXgt71y	No	Edit Delete

7. If you plan to use the second source key, do not log out of USAePay yet; you will need to copy the second source key when completing the next task.

Task 2: Configure USAePay Credit Card Processing in PrintSmith Vision

When you are using integrated credit card processing in PrintSmith Vision (which is licensed separately), use the **Credit Card Info** preferences to configure the connection to the **USAePay** payment gateway.

1. In PrintSmith Vision, navigate to **Configuration > Preferences > Settings** and then select **Accounting > Credit Card Info**.
2. Select the **Activate credit card approval processing** check box and leave **USA ePay** selected.
3. Unless you are otherwise advised, leave **Normal Mode** selected. (**Developer Mode** is sometimes used during testing.)
4. Ignore the **Activity Logging** check box. (PrintSmith Vision Support may ask you to activate logging to diagnose a problem you may be having.)

5. Enter the USAePay source key(s) and PIN:
 - a. In the **USAePay production URL** field, enter the production/live URL of USAePay portal to connect to.
 - b. In the **USA ePay source key. Credit Card Sale** field, paste the first source key you copied on the USAePay site as mentioned in [Establish your USAePay account](#).
 - c. In the **USA ePay source key. Credit Card SAVE** field, either paste the same source key (if using one key) or go back to the USAePay site, copy the second source key, and paste it here.
 - d. In the **USA ePay PIN** field, enter the PIN that you established when setting up your USAePay merchant account.
8. Test the connection, click **Test Connection** to confirm that you are connected to USAePay. If you get a **"Success"** message, click **OK**. If you get an error message, it will offer suggestions about what to check before testing again.



Be sure you get a message confirming the connection is successful before continuing.

9. Ignore the list of credit card types. These selections apply only if you are not using integrated credit card processing. When integrated with USAePay, you select the types of credit cards you plan to accept when setting up your merchant account, not in the Credit Card Info preferences.
10. Click **Save** in the Preferences window.

Setting up CardConnect®

PrintSmith Vision allows secure payment transactions via CardConnect.

To use PrintSmith Vision with CardConnect you must:

- Obtain your CardConnect credentials.
- Configure PrintSmith Vision to work with CardConnect.

Task 1: Obtain CardConnect Credentials

The first step is to obtain your credentials from CardConnect.

1. To get started, contact **CardpointeSupport@cardconnect.com** to receive an e-mail about your company name, merchant number, and a **message.html** link.
2. Open **message.html** enclosed in the e-mail and request a **one-time passcode** to obtain your username credentials.
Tip Check your company email inbox for an email with the one-time passcode.
3. Enter the one-time passcode in the **message.html** webpage that you opened (window requesting the passcode) and select **Continue**.
4. Check your company email inbox for an encrypted email that contains your unique production credentials:
 - Company Name
 - Merchant ID
 - User Name
 - Password

Task 2: Configure CardConnect Credit Card Processing in PrintSmith Vision

When you are using the **CardConnect** payment provider to process your credit card transactions, use the **CardConnect Setup** window to set up the card details.

Important Ensure the CardConnect terminal device is connected with the system before performing the integration.

1. In PrintSmith Vision, navigate to **Configuration > Preferences > CardConnect Setup**.
2. Select the **Enable CardConnect Integration** check box to configure the integration with CardConnect.
3. **CardPointe Gateway URL** field displays the CardConnect production/live URL.
4. Enter a **User Name** and **Password** that you received through an encrypted email from your CardConnect® vendor.

Tip Once your CardConnect account has been setup, you can find your User name, Password, and Merchant ID information in the third email that you received from CardConnect.

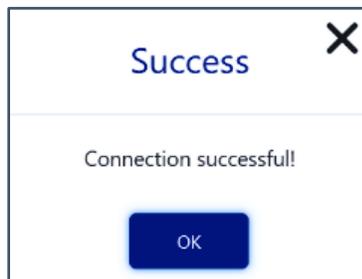
5. If you are an existing customer of CardConnect, select the **Use V2 Version of API** check box.
6. Leave the **Bolt URL and Authentication Key** fields unchanged.

Note CardPointe Gateway URL, Bolt URL, and Authentication Key fields are pre-populated. ePS recommends not to make any changes to these field.
7. Enter your **Merchant ID** from the encrypted email that you received from CardConnect®.
8. Leave the **Ask for Pin** and **Ask for Zip Code** check boxes unselected.
9. Click the **+Add Terminal** button to add a POS terminal.
 - a. Enter a **Name** to identify the terminal device in the box on left. Example: Terminal-1, Front Desk.
 - b. Enter the **Terminal HSN** code in the box on right. You can find the HSN serial key printed on the POS terminal device label or turn on the POS device and locate the HSN serial key displayed.



- c. Click **Ping** to test and confirm the connection to the terminal.

If you get a **“Success”** message, click **OK**. If you get an error message, it will offer suggestions about what to check before testing again.



Be sure you get a message confirming the connection is successful before continuing.

You can add another terminal by clicking the **+Add Terminal** again or click the **Delete** icon to delete a terminal.

11. Click **Save** in the CardConnect Setup window.

Next Steps

After you have a successful connection with USAePay and/or CardConnect, you can start processing credit cards in PrintSmith Vision.

Credit Card Processing

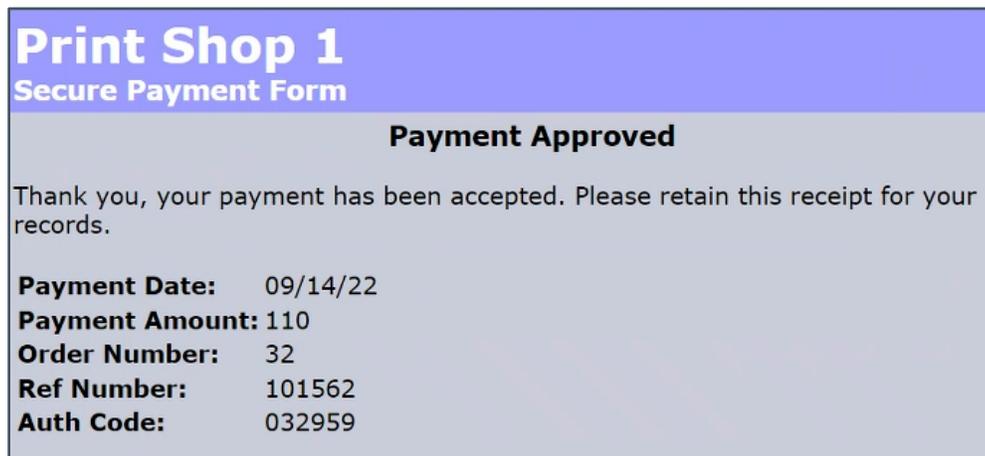
Overview

When credit card processing is integrated with PrintSmith Vision, you can do the following:

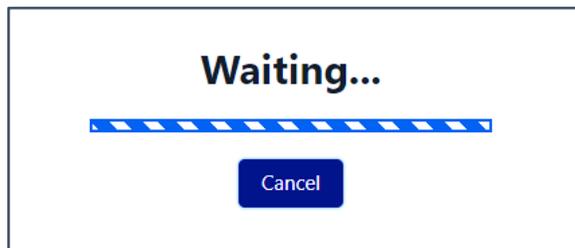
- Keep credit cards on file for contacts (to avoid having to re-enter the card data).
- Use credit cards for payments, for example, in the cash register, for invoice pickups and deposits, when posting payments, and so on.
- Refund credit card payments.
- Review credit card transactions in PrintSmith Vision. (Credit card transactions are recorded on the register tape. Additional details are available in the Credit Card Manager in PrintSmith Vision.)

If the transaction is approved

- In the case of payment via **USA ePay**, when the transaction is approved, you will get a **Payment Approved** message from payment gateway provider.



- In the case of payment via **CardConnect**, when the transaction is approved, a **Payment Approved** message is displayed on the POS device.
- After the payment is approved, the Reference Code for the payment is recorded in PrintSmith Vision (for example, in the Ref # field in the Cash Register window). There is a slight delay before this occurs, and you will see this message:



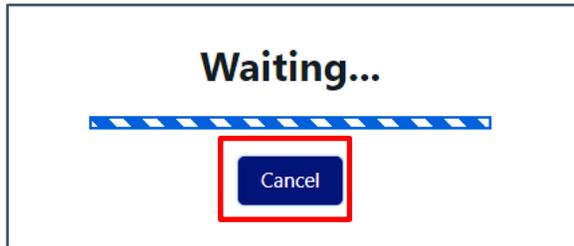
If the transaction is declined

- When the transaction is declined, a Payment Declined message is displayed.
- When PrintSmith Vision is informed the transaction was declined, the Credit Card Details window will remain open (until you click Close) to remind you the payment was not made. You can then try to re-

process the card (in case an error was made entering the card data) or obtain a different credit card from the customer.

If you need to cancel a transaction

If you decide to cancel a transaction while processing the credit card payment, always do this in PrintSmith Vision: bring the PrintSmith Vision Credit Card Details window to the forefront and click **Cancel**. This ensures the transaction is cleanly canceled.



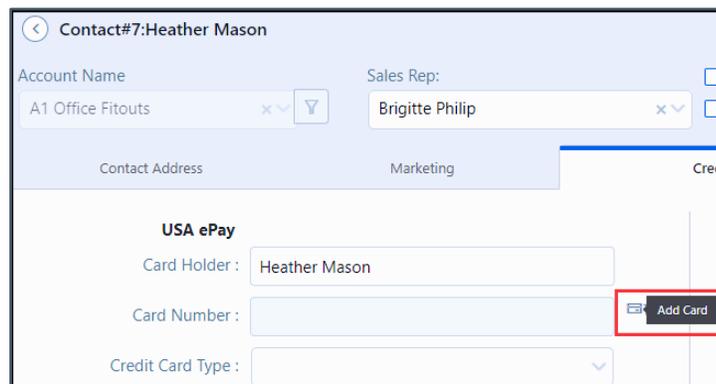
Note If a transaction is approved, and you then need to cancel it, you do so by voiding the transaction in PrintSmith Vision. The sections that describe how credit cards are used for payment include information about voiding transactions at various points in the process.

Adding a Credit Card to a Contact

When you are using integrated credit card processing in PrintSmith Vision, use the **Credit Info** tab in the **Contacts** window to save the credit card information for the contact.

If a contact makes frequent credit card payments, the contact may want you to keep the credit card information on file to avoid having to re-enter it when picking up invoices. The credit card information is stored in payment gateway provider, not PrintSmith Vision, but PrintSmith Vision knows a credit card is on file for the contact.

1. Open the **Contact** for whom you want to keep a credit card on file and click the **Credit Info** tab.
2. For secure payment transactions via **USAePay**, complete the following in the USA ePay section:
 - a. Complete the **Card Holder** field and click the credit card icon to the right of the **Card Number** field.

A screenshot of the PrintSmith Vision interface for a contact named Heather Mason. The interface shows the 'USA ePay' section. The 'Card Holder' field is filled with 'Heather Mason'. The 'Card Number' field is empty. To the right of the 'Card Number' field is a credit card icon and an 'Add Card' button, which is highlighted with a red box. The 'Credit Card Type' field is also empty. The interface includes a back arrow, a contact name 'Contact#7:Heather Mason', and dropdown menus for 'Account Name' (A1 Office Fitouts) and 'Sales Rep' (Brigitte Philip).

Depending on the browser you are using, a secure form for entering the card information opens either on a new tab in the browser window or in a new browser window. (The form you see may look slightly different since it is possible to customize it.)

- b. If you have a scanner, click **Swipe** and run the card through the scanner. Otherwise type the information exactly as on the credit card.
- c. Click **Save Card**. You will get a confirmation message.
- d. Close the browser tab/window with the confirmation message.

Some of the information is now displayed on the Credit Info tab in PrintSmith Vision, but only the last four digits of the credit card number are displayed – and none of the credit card information is stored in PrintSmith Vision.

- e. (Optional) Complete the **Email**, **Street**, and **Zip** fields for the card holder.

Notes If an e-mail address is provided, receipts of credit card transactions are sent automatically to this address when this credit card is used for payment.

You can always provide a different e-mail address for a receipt in the Credit Card Details window.

If you turned on **Activate user event logging** in the System Behavior preferences, the user event log (**Configuration > System Monitor > User Events**) tracks both when a credit card is saved for a contact and when a credit card is deleted.

3. For secure payment transactions via **CardConnect**, complete the following in the CardConnect Profile section:

Note The **CardConnect Profile** section is available only if the Enable CardConnect Integration checkbox is selected in the CardConnect Setup window.

- a. Complete the **Card Holder** field and click the credit card icon to the right of the **Profile ID**.

The **Add Card Details** window opens to enter the card details.

- b. If you have a scanner, select the **Swipe Card** option, and then select the **POS Terminal** information. On your POS device, swipe your credit card and click Confirm.

If you choose to enter the credit card information on the POS device, select Enter Card on Device and then select the **POS Terminal** information. On your POS device, type your credit card information and click Confirm.

If you choose to enter the credit card information, select Add Card and then complete the fields.

- c. Click **Continue** on the **Add Card Details** window. You will get a confirmation message.

Some of the information is now displayed on the CardConnect Profile section, but only the last four digits of the credit card number are displayed – and none of the credit card information is stored in PrintSmith Vision.

- e. (Optional) Complete the **Phone, Email, Street, Zip, City, Region, and Country** fields for the card holder.

Notes If an e-mail address is provided, receipts of credit card transactions are sent automatically to this address when this credit card is used for payment.

You can always provide a different e-mail address for a receipt in the Credit Card Details window.

4. Click **Save** to save the contact information.

Note To remove a saved credit card, click the **Remove Card** icon to the right of the **Card Number/Profile ID** field.

Processing Credit Card using USAePay

About the Secure USAePay Form

When you indicate in PrintSmith Vision that payment is being made by USA ePay (or you are saving credit card information for a contact), a secure form hosted by USAePay opens.

Depending on the browser you are using, this form opens either on a new tab in the browser window or in a new browser window.

Important Points to Keep in Mind

- The form that you see may be slightly different. The form is an HTML-based template supplied by ePS. If you are experienced with HTML, you may want to customize the form further, for example, by including your company name. The content of the form may be customized through payment gateway provider.
- When the form is open, you must provide the credit card information either by clicking **Swipe** and then using a scanner to swipe the card or by typing the card information. (The system expects the credit card information to be entered within a certain time. If you do not enter it within the expected time, PrintSmith Vision will time out.)
- Always wait for a response from payment gateway provider (a message that approves or declines the transaction) before doing anything else. While waiting, never do any of the following before processing is complete:
 - Use the back button in the browser.
 - Refresh the browser.
 - Close the browser tab or window with the secure form.

About Receipts for Transactions

Whenever an e-mail address is entered in the **Credit Card Details** window in PrintSmith Vision (as described in the various procedures below), a receipt for the transaction will automatically be e-mailed to that address from USAePay (not PrintSmith). The receipts are in a standard format, but for a small fee, the format of receipts can be customized. If you are interested in having this done, contact:

Bristol Pay

877-338-8112 and select option 1 for **Sales**.

Note In PrintSmith Vision, you can print receipts as usual from the **Cash Register** and **Post Payments** windows.

Using Credit Cards for Payment

You can use credit cards for payment in various places in PrintSmith Vision.

Cash Register

1. In the **Cash Register** window, after specifying the transaction (for example, 100 color copies), select **Credit Card** in the **Payment Method** section. (Do *not* select a **Card Type**.)

The screenshot shows the 'Cash Register' interface. At the top, there are fields for 'Customer' and 'Enter Invoice#'. Below that, a table lists items: 'BW Copy A4' with a quantity of 100 and a unit price of \$1.15, and '100 Color Copies' with a unit price of \$1.15. The total item amount is \$126.50. The 'Sales Tax' is \$11.50. The 'Payment Method' section has 'Credit Card' selected. A red box highlights the 'Process Credit Card' button next to the 'Ref #' field. The 'Amount Receivable' is \$126.50. On the right side, there is a 'Transaction Details' table showing 'Sub-Total' of \$115.00, 'Sales Tax (Default)' of \$11.50, and 'Total Cost' of \$126.50. Below that is a 'Payment History' table showing 'Payment Received/Charged' of \$0.00 and 'Change' of \$0.00. A 'Proceed' button is at the bottom right.

2. To take advantage of integrated credit card processing, click the credit card icon to the right of the **Ref #** field. The **Credit Card Details** window opens.

Credit Card Details

USA ePay CardConnect

Amount: \$ 126.50

Tax: \$ 11.50

PO Number:

E-Mail:

Verbal Auth. Number:

Card Number:

Cancel Continue

3. In the Credit Card Details window:
 - a. Select the **USA ePay** option.
 - b. (Optional) Complete the **PO Number** and/or **E-mail** fields.
 - c. Ignore the **Verbal Auth. Number** field.
 - d. Click **Continue**.

The secure credit card payment form opens.

Credit Card Payment Form

VISA MasterCard American Express Discover

Order Summary:

Order Date: 09/14/22
 Order Amount: 126.5
 Order Number: 53
 Customer IP: 87.209.71.19
 Description: 100 Color Copies

Credit Card Information:

Card Type:

Name as on Card:

Card Billing Address:

Card Billing Zip code:

Card Number: 

Card Expiration Date: MMY

Card ID (CVV2/CID) Number: [\[What is the Card ID?\]](#)

3. If you have a scanner, click **Swipe** and swipe the card. (If you swipe the card, and some data is missing, enter it manually.) Otherwise, type the credit card information, being sure to complete all the fields.

4. Click **Process Payment**.

A message approving or declining the transaction is displayed.

Print Shop 1
Secure Payment Form

Payment Approved

Thank you, your payment has been accepted. Please retain this receipt for your records.

Payment Date: 09/14/22
Payment Amount: 126.5
Order Number: 56
Ref Number: 101579
Auth Code: 034945

Notes If you take too long entering the card information, PrintSmith Vision may time out. A message is displayed when a timeout occurs. You can also use **Preferences > Credit Card Manager** to check if PrintSmith Vision timed out. In case timeout occurs, check to be sure that pop-up blocker is disabled in the browser.

Credit Card Manager

USA ePay CardConnect

Receipt Printer: Microsoft XPS Document ... Print Receipt

	Status	Result	Order #	Account Id
		Approval system timed out		
\$ 10.00	Complete	Approval system timed out	162596	2
\$ 261.02	Complete	Approval system timed out	162548	3
\$ 110.00	Complete	Approval system timed out		3

When PrintSmith Vision times out *after* the credit card transaction was authorized but *before* the authorization code was transmitted to the **Ref #** field in the Cash Register window, you must enter the authorization code manually. (Avoid re-running the card because you can end up with duplicate charges if the first charge was authorized.) Obtain the authorization code (either from the Payment Approved window if it is still open, or by logging into your merchant account and finding it in the list of transactions). Then enter this code in the **Ref #** field in the Cash Register window in PrintSmith Vision so you can post the transaction.

After PrintSmith Vision receives the information about the payment being approved, the transaction is listed in the **Payment History** section of the Cash Register window with the authorization code (Ref #) shown in parentheses.

Account Type	Status
Transaction Details	
Sub-Total	\$ 115.00
Sales Tax (Default)	\$ 11.50
Total Cost	\$ 126.50
Payment History	
Credit Card (Ref# 034949)	\$ 126.50 
Payment Received/Charged	\$ 126.50
Change	\$ 0.00
Proceed	

Tip If at this point you realize you need to void the payment transaction, select it, and click Void Transaction (minus sign) icon.

- After the payment is processed, click **Proceed** in the **Cash Register** window to proceed with the payment. The following window is displayed:

Qty	Mac Tax
	
Last transaction payment received	
Approved (ref #034949)	
Transaction Total	\$ 126.50
Payment Received/Charged	\$ 126.50
Change	\$ 0.00
<input checked="" type="checkbox"/> Receipt Print	Microsoft XPS Document Writer
<input type="checkbox"/> Print Format	Form w/Logo (excl.GST) Show T...
<input type="checkbox"/> E-Mail Invoice	<input type="checkbox"/> Customize E-Mail
Cancel Post	

- Click **Post** to post the payment.

To print a receipt, select the Receipt Print check box. (If you do not print a receipt now, you will be unable to reprint it later from Credit Card Manager.)

After you post the transaction, it is listed on the **Register Tape** window along with the authorization code (**Ref #**). You can void a credit card transaction just like any other transaction on Register Tape.

ID	Date	Transaction	Price	Total
Tape opened v6.0 6.1.0.4084 on 09/15/2022, at 2:00 AM. 3 entries.				
1	09/14/2022 10:15 PM	POS by "admin"	Tax: \$ 11.50	\$ 126.50
		Dept: 3 100 Color Copies 100x\$ 1.15 (Default)	\$ 115.00	
		Payment - VISA (ref #034949) (Default)	\$ 126.50	

You can also see the transaction in the Credit Card Manager window in PrintSmith Vision (**Preferences > Credit Card Manager**).

Transaction Date	Type	Card Number	Card Holder	Card Type	Expiration	Amount	Status	Result	Order #	Account Id	User
09/15/2022	Keep on file	XXXXXXXXXXXX1111			Select Date Range	\$ 0.00	Complete	Approved -> Token Sav...			admin
09/15/2022	Keep on file		Heather Mason			\$ 0.00	Complete	Approval system timed ...			admin
09/14/2022	Charge	XXXXXXXXXXXX1111	Heather Mason	Visa	09/30/2023	\$ 126.50	Complete	Approved -> 034949			admin

Invoice Pickups

When you pick up an invoice and pay with a credit card, the process of paying with a card is very similar to the process described above for Cash Register.

1. Pick up an invoice in the **Pending Documents** window by clicking the **Invoice Pickup** button.

The screenshot shows the 'Invoice Summary' window for invoice # F062-162614. The 'Invoice Pickup' button is highlighted with a red box. Below the invoice details, there is a table with columns: Item, Product, Description, Price, Qty, Unit Price, Tax Amount, and Item Total. The table contains one row for 'Digital Color 500 Business Cards' with a quantity of 500 and a total of \$392.66.

The **Cash Register** window opens.

2. In the **Payment Method** section, for integrated credit card processing, click the credit card icon to the right of the **Ref #** field.

The screenshot shows the 'Cash Register' window for customer 'Axis Healthcare Pty. Limited'. The 'Payment Method' is set to 'Credit Card'. The 'Ref #' field has a credit card icon to its right, which is highlighted with a red box and labeled 'Process Credit Card'. The 'Item Total' is \$431.93. On the right side, there is a 'Transaction Details' section showing a sub-total of \$392.66 and sales tax of \$39.27, resulting in a total cost of \$431.93.

Note If a credit card is on file for the contact for the account, the workflow is different. For more information, see [When a credit card is on file](#).

The Credit Card Details window opens. The rest of the process is same as described in the [Cash Register](#) section.

3. In the **Credit Card Details** window:
 - a. Select the **USA ePay** option.

- c. (Recommended) Enter the invoice number in the **PO Number** field. (This will tie the payment to a specific invoice and help track it.)
- d. (Optional) Complete the **E-mail** field.

Tip When the E-mail field includes an address, a receipt of the transaction is automatically e-mailed to that address.

- e. Click **Continue**.
4. Complete the secure payment form and wait for the approval message.
After PrintSmith Vision receives the information about the payment being approved, the payment transaction is listed in the Cash Register window (where you can void it if necessary).
 5. Post the transaction as usual. It will now be listed on the register tape where you can void it if necessary.

Last transaction payment received

Approved (ref #036337)

Transaction Total **\$ 431.93**
Payment Received/Charged **\$ 431.93**
Change **\$ 0.00**

Receipt Print Microsoft XPS Document Writer

Print Format Form w/Logo (excl.GST) Show Totals

E-Mail Invoice Customize E-Mail

Cancel **Post**

Invoice Deposits

If a credit card is used to make a deposit for an invoice, the procedure for recording the transaction is also very similar to what you do in the Cash Register window.

1. In the Invoice Summary tab, click the **Add Deposits** icon to make a deposit for an invoice. The **Deposit Entry** window opens.

Discount/MarkUp	\$ 0.00
Net Sub	\$ 1,745.46
Shipping	\$ 0.00
Sales Tax (10.0%)	\$ 174.55
Deposits(0)	\$ 0.00
Total	\$ 1,920.01

2. In the **Deposit Entry** window, select **Credit Card** and enter an **Amount**.

Deposit Entry

1: Add New

Cash Check Credit Card

Card Type: Generic Card

Ref #

Amount: 1,000.00

Add Another Confirm

- Click the credit card icon to the right of the **Card Type** field. The **Credit Card Details** window opens.

Note If a credit card is on file for the contact for the account, the workflow is different. For more information, see [When a credit card is on file](#).
- Select the **USA ePay** option. Complete the PO Number and E-mail fields, and then click **Continue**. The secure payment window opens.
- Supply the card information, click **Process Payment**, and wait for the approval message.
- After the payment is approved, click **Confirm** in the Deposit Entry window.

Deposit Entry

1: Add New

Cash Check Credit Card

Card Type: Visa(VISA)

Ref #: 036441

Amount: 1,000.00

Add Another Confirm

The deposit is now shown in the **Invoice Summary** tab.

Discount/MarkUp	\$ 0.00
Net Sub	\$ 1,745.46
Shipping	\$ 0.00
Sales Tax (10.00%)	\$ 174.55
Deposits(1)	\$ 1,000.00
Total	\$ 1,920.01
Amount Due	\$ 920.01

- To void a deposit made with a credit card, open the Deposit Entry window again and click Void.

A message will inform you that the void was successful.

Post Payments

1. In the **Post Payment** window, if you are posting a payment made with a credit card, follow the normal procedure for posting a payment, but click the credit card icon to the right of the **Ref #** field.

2. In the **Credit Card Details** window that opens, select the **USA ePay** option.
3. (Optional) Complete the **PO Number** and **E-mail** fields and then click **Continue**. The secure payment form opens.

Tip When the E-mail field includes an address, a receipt of the transaction is automatically e-mailed to that address.

3. In the secure payment form, provide the credit card information, click **Process Payment**, and wait for the approval message.

When using integrated credit card processing, the Ref # field is completed automatically after the payment is approved. The Post Payments window now displays the authorization code in the Ref # field.

4. After the payment is authorized, post the payment as usual.

Verbal Authorizations

Occasionally you may have to obtain a verbal (voice) authorization to process a credit card. In this situation, you must enter the authorization number in the Credit Card Details window before continuing to the secure payment form.

Credit Card Details

USA ePay CardConnect

Amount: \$ 1,160.00

Tax: \$ 100.00

PO Number:

E-Mail: heather@abc.com

Verbal Auth. Number:

Card Number: XXXXXXXXXXXXXXX1111

Cancel Continue

Processing Credit Card using CardConnect

About CardConnect

When you indicate in PrintSmith Vision that the payment is being made via **CardConnect** (or you are saving credit card information for a contact), the Credit Card Details window opens.

Note In PrintSmith Vision, you can print receipts as usual from the **Cash Register** and **Post Payments** windows.

Using Credit Cards for Payment

You can use **CardConnect** credit cards for payment in various places in PrintSmith Vision.

Cash Register

From Cash Register you can receive a full or partial payment (on account) for an invoice using a credit card. The invoice can be for a job or departmental charges.

1. In the **Cash Register** window, after specifying the transaction (for example, 100 color copies), select **Credit Card** in the **Payment Method** section. (Do *not* select a **Card Type**.)

Cash Register

Customer: Please type at least two characters to search

Enter Invoice# Add Invoices Department Item Quick Charge

Account Type Status

Department	Qty	Sales Tax	Item Total
BW Copy A4	100	\$ 11.50	\$ 126.50
100 Color Copies			

Transaction Details

Sub-Total	\$ 115.00
Sales Tax (Default)	\$ 11.50
Total Cost	\$ 126.50

Payment Method: Cash, **Credit Card** (checked), Charge, Check, Apply Surcharge

Card Type: Generic

Ref # **Process Credit Card** Amount Receivable: \$ 126.50

Payment History: Payment Received/Charged: \$ 0.00, Change: \$ 0.00

Proceed

2. Select the **Card Type** field and then click the credit card icon to the right of the **Ref #** field. The **Credit Card Details** window opens.

Note Selecting the Card Type field will also determine the surcharge that was set up for that card.

Credit Card Details

USA ePay CardConnect

Amount: \$ 272.99

Tax: \$ 24.33

Invoice #: 142043

POS Terminal: Production Machine - 15002PP812...

Authorize Card Authorize Manually

Cancel Continue

3. In the Credit Card Details window:
 - a. Select the **CardConnect** option.
 - b. (Optional) Complete the **Invoice#** field.
 - c. Select the associated **POS Terminal**.
 - d. Do one of the following:
 - Select Authorize Card, click Continue and then scan the credit card using the POS device. If the payment process is successful, a message that the transaction has completed is displayed on the POS device.
 - Select Authorize Manually and then manually type the credit card information. Click **Continue**.

A message approving or declining the transaction is displayed.



After PrintSmith Vision receives the information about the payment being approved, the payment will reflect in the **Payment History** section of the Cash Register window with the reference code (Ref #) shown in parentheses.

Account Type	Status
Charge Account	Delinquent
Transaction Details	
Sub-Total	\$ 252.73
Tax (GST)	\$ 25.27
Total Cost	\$ 278.00
Payment History	
Credit Card (Ref# 7373823828)	\$ 286.34 
Payment Received	\$ 286.34
Change	\$ 0.00
Proceed	

Tip If at this point you realize you need to void the payment transaction, select it, and click Void Transaction (minus sign) icon.

- After the payment is processed, the message that the payment was received is displayed and you can then post the payment. Click **Proceed** in the **Cash Register** window to proceed with the payment.

The following window is displayed:



Last transaction payment received

Transaction Total	\$ 267.64
Surcharge	\$ 5.35
Payment Received	\$ 272.99
Change	\$ 0.00

<input type="checkbox"/> Receipt Print	Microsoft XPS Document Writer
<input type="checkbox"/> Print Format	Form O'Print (excl. GST)
<input checked="" type="checkbox"/> E-Mail Invoice	

Cancel Post

- Click **Post** to post the payment.

You can also print a receipt, determine the format style, and email an invoice from this window. (If you do not print a receipt now, you will be unable to reprint it later from Credit Card Manager.)

Note You can void a transaction even after the invoice is posted before the closeout is performed. The transaction can be voided from Register Tape. Once the transaction is voided, it will also reflect on the Credit Card Manager window.

Invoice Deposits

If a credit card is used to make a deposit for an invoice, the procedure for recording the transaction is also very similar to what you do in the Cash Register window. You can add a deposit even if you do not save an invoice.

1. In the Invoice Summary tab, click the **Add Deposits** icon (plus sign) to make a deposit for an invoice. The **Deposit Entry** window opens. The **Add Deposit** option enables you to receive the deposit from a credit card.

Discount/MarkUp	\$ 0.00
Net Sub	\$ 5,287.10
Shipping	\$ 0.00
Sales Tax (20.0)	\$ 1,057.42
Deposits	\$ 0.00
Total	\$ 6,344.52

2. In the **Deposit Entry** window, select **Credit Card**, **Card Type**, and enter an **Amount**.

Deposit Entry [X]

▼ 1: Add New

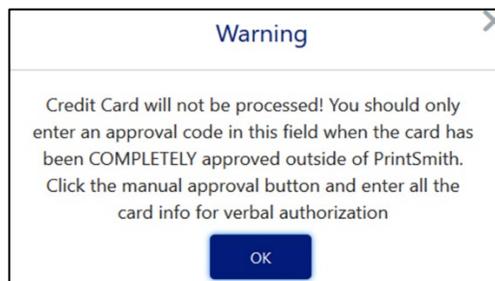
Cash
 Check
 Credit Card

Card Type: 

Ref #:

Amount:

Notes Ref # is only filled in using a confirmation number that you receive outside of PrintSmith Vision.



Exiting the Deposit Entry window without confirming will cause the transaction to be voided.

3. Click the credit card icon to the right of the **Card Type** field. The **Credit Card Details** window opens.

Note If a credit card is on file for the contact for the account, the workflow is different. For more information, see [When a credit card is on file](#).

4. Select the **CardConnect** option.

With the CardConnect option, the Credit Card Details window displays the amount, invoice number, and POS Terminal. Use the **POS Terminal** drop-down field to change the terminal identification.

- If you select **Authorize Card**, click **Continue** and then swipe the credit card.
- If you select **Authorize Manually**, manually enter the information about the credit card, and then click **Continue**.

A message approving or declining the transaction is displayed.

6. After the payment is approved, click **Confirm** in the **Deposit Entry** window.

The deposit is now shown at the bottom of the **Invoice Summary** tab.

Discount/MarkUp	\$ 0.00
Net Sub	\$ 5,287.10
Shipping	\$ 0.00
Sales Tax (20.00%)	\$ 1,057.42
Deposits (1)	\$ 1,000.00
Total	\$ 6,344.52
Amount Due	\$ 5,344.52

10. To void a deposit made with a credit card, open the **Deposit Entry** window again and click **Void**.

A message will inform you that the void was successful. Voiding a deposit will cause the transaction to be reversed and the deposit amount attached to the invoice will be removed.

Voiding an invoice in Pending Documents

You can void an invoice from the Pending Documents window. Select the invoice that you want to void and click the three-dots ellipsis in the invoice row, and then select **Void Invoice**.

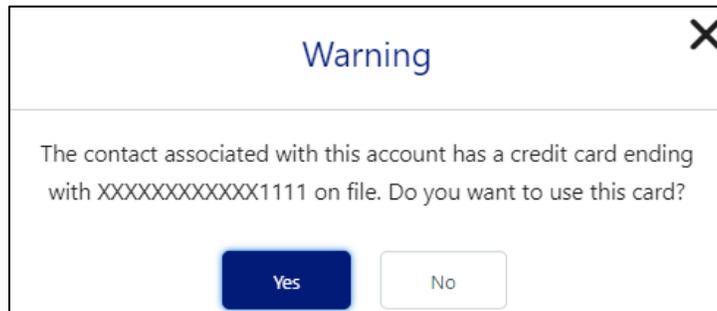
If the invoice has a deposit on it, a warning message is displayed. Click **Yes** if you want to refund the deposit.

When you select Yes, the amount is returned and in the Credit Card Manager, the amount is displayed as Voided. If you click No, then the deposit will be FORFEITURE.

Processing When Credit Card is on File

If a credit card is the payment method when you pick up an invoice, make a deposit, or post a payment, and the contact for the account has a credit card on file, the steps for processing the credit card payment are slightly different.

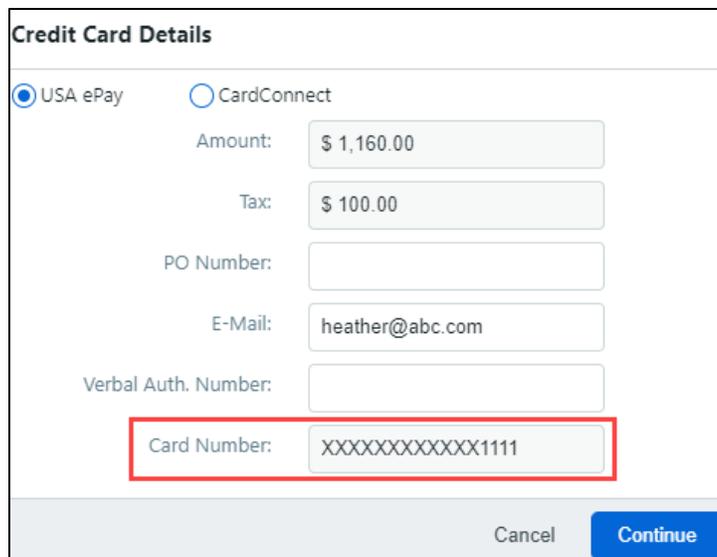
1. Click the credit card icon as usual. If the contact for the account has a credit card on file, a message is displayed.



A warning dialog box with a blue title bar and a close button (X) in the top right corner. The title is "Warning". The main text reads: "The contact associated with this account has a credit card ending with XXXXXXXXXXXX1111 on file. Do you want to use this card?". At the bottom, there are two buttons: "Yes" (dark blue) and "No" (light gray).

Note If you click **No**, the payment process is as described in earlier sections, you can provide credit card information.

2. If you want to charge the card associated with the contact, click **Yes**. The **Credit Card Details** window opens with the last four digits of the credit card displayed.



The "Credit Card Details" window. It has a title bar and a close button. Below the title bar, there are two radio buttons: "USA ePay" (selected) and "CardConnect". Below these are several input fields: "Amount" with a value of "\$ 1,160.00", "Tax" with a value of "\$ 100.00", "PO Number" (empty), "E-Mail" with a value of "heather@abc.com", and "Verbal Auth. Number" (empty). The "Card Number" field is highlighted with a red border and contains "XXXXXXXXXXXX1111". At the bottom right, there are "Cancel" and "Continue" buttons.

Tip If an e-mail was specified for the contact on the **Credit Info** tab, a receipt of the transaction is automatically e-mailed to that address. You can, however, specify a different address for the receipt in the **E-mail** field here in the **Credit Card Details** window.

3. Click **Continue**.

In this situation the secure payment form for USAePay does not open since the credit card information is already there. You will just get an approval message.

4. Once the payment is processed, post the transaction.

Handling Credit Card Refunds

Note Only users with permission to do so can refund credit card payments. (The **Can refund on Credit Cards** check box in the Admin > User Definitions window must be selected.)

To process a refund

1. Select **Configuration > Preferences > Credit Card Manager**. The **Credit Card Manager** window opens.

Note For more information, see Credit Card Manager.....

Transaction Date	Type	Card Number	Card Holder	Card Type	Expiration	Amount	Status	Result	Order #	Account Id	User
09/15/2022	Charge	XXXXXXXXXXXX1111	Heather Mason	Visa	09/30/2023	\$ 1,160.00	Complete	Approved -> 037350	162602	2604	admin
09/15/2022	Charge	XXXXXXXXXXXX1111		Visa		\$ 1,000.00	Complete	Approved -> 036441	162515	2887	admin
09/15/2022	Charge	XXXXXXXXXXXX1111		Visa		\$ 431.93	Complete	Approved -> 036337	162614	2604	admin
09/15/2022	Keep on file	XXXXXXXXXXXX1111	Heather Mason	Visa	09/30/2023	\$ 0.00	Complete	Approved -> Token Sav...			admin
09/15/2022	Keep on file		Heather Mason			\$ 0.00	Complete	Approval system timed ...			admin

2. Select the payment provider - **USAePay** or **CardConnect** from which you want the refund.
3. Locate and select the transaction that you want to refund. You can use the reference number of the original transaction to locate the transaction that you want to refund.

Note If you select the **USA ePay** tab, enable the **Include Historic Transactions** option to view all the transactions.

4. Click the **Refund** button. The Credit Card Details window opens.

Credit Card Details

Refund Amount: \$ 1,160.00

Transaction Amount: \$ 1,160.00

Tax: \$ 100.00

Reference Number: 101583

Invoice #: 162602

Approval Code: 037350

Card Number: XXXXXXXXXXXXXXX1111

Cancel Continue

4. Click **Continue**.

Once the refund is processed and approved, a message reminds you to make a journal entry for the refund.

Success X

To complete the credit of 1160, make sure you have entered a Journal Entry for the customer and that you apply the remainder as a 'credit card refund'

OK

5. Click **OK**, record the journal entry to account for the refund, and then be sure to select credit card refund in the **Remainder** field in the **Post Payments** window.

Reviewing Transactions with Credit Card Manager

In PrintSmith Vision, you can review a list of all credit card transactions and see their status. For example, you may need to research a transaction, find a reference number, print a receipt, or void a transaction.

Select **Configuration > Preferences > Credit Card Manager**. The **Credit Card Manager** window opens.

All the credit card transactions performed in PrintSmith Vision are split into two tabs based on the payment providers: USA ePay and CardConnect.

USA ePay

Transaction Date	Type	Card Number	Card Holder	Card Type	Expiration	Amount	Status	Result	Order #	Account Id	User
06/20/2016	Charge					\$ 1.00	Complete	Error in approval system	144657	1	Ca2B
06/13/2022	Charge	XXXXXXXXXXXXXXXXXXXX		Visa		\$ 99.55	Complete	Approved -> 633749	162562		admin
08/11/2021	Charge	XXXXXXXXXXXXXXXXXXXX		Visa		\$ 3.00	Complete	Declined	162479	2320	admin
09/14/2022	Reverse	XXXXXXXXXXXXXXXXXXXX		Visa		\$ 275.00	Complete	Successfully Voided		2	admin
06/13/2022	Reverse	XXXXXXXXXXXXXXXXXXXX		Visa		\$ 99.55	Complete	Successfully Voided	162562		admin
08/11/2021	Charge	XXXXXXXXXXXXXXXXXXXX		Visa		\$ 2.00	Complete	Approved -> 823174	162478	2320	admin
09/14/2022	Charge	XXXXXXXXXXXXXXXXXXXX		Visa		\$ 275.00	Complete	Approved -> 032985		2	admin
09/14/2022	Reverse	XXXXXXXXXXXXXXXXXXXX		Visa		\$ 110.00	Complete	Successfully Voided		2	admin

CardConnect

Transaction Date	Type	Card Holder	Reference	Amount	Message	Order #	Account Id
09/20/2022	Charge to card		263057123045	\$ 0.01	Approval	221	3
09/20/2022	Charge to card		263049122928	\$ 1,160.00	Approval		
09/20/2022	Charge to card		263672021305	\$ 431.93	Approval		3

Features

Use the buttons as follows:

Button	Description
Print Receipt	Reprint the receipt for the selected transaction. You can only reprint a receipt if you previously printed one from the Cash Register or Post Payments window.
Refund	Refund a credit card payment.
Void	Void the selected transaction. Note Not available in the CardConnect tab.
Delete	Delete a transaction that was hung. (This rarely happens.) Note Not available in the CardConnect tab.
Refresh	Update the list (which is a snapshot of transactions).

Include Historic Transactions | Lists all credit card transactions.

Color Coding

Colors on the left most column are used to identify transactions:

- **Black**: processed transactions.
- **Red**: credits and reversals.

- **Blue:** Declined transactions, transactions canceled by the user, or transactions that did not go through (for example, PrintSmith Vision timed out).
- **Green:** Pending transactions (you are unlikely to see these unless the window is open while you are submitting a card transaction).

USA ePay Tab

The **USA ePay** tab lists the card transactions that have taken place using the USA ePay payment gateway provider. Scroll to the right to see all the columns. This tab includes details such as:

- The date of the transaction.
- Information about the transaction, for example, Charge to card, with the last four digits of the card number where applicable.
- The last four digits of the card number.
- The card holder's name (for credit cards on file).
- The amount involved.
- The status, for example, Approved or Declined.
- The name of the user who was logged in when the transaction was recorded.
- The expiration date (for credit cards on file).
- The PrintSmith Vision customer account number.
- The reference number for the transaction.
- Flags related to the credit card such as AVS (address verification system), CW2 (control security code), and so on.
- A file/order number. This number can also be found in the merchant account details for transactions processed through PrintSmith Vision.

CardConnect Tab

The **CardConnect** tab lists the card transactions that have taken place using the CardConnect payment gateway provider. This tab includes details such as:

- The date of the transaction.
 - The type of transaction, for example, Charge, Reverse (for a void), or Credit (for a refund).
 - The card holder's name (for credit cards on file).
 - The reference number for the transaction (required for refunds or credits).
 - The amount involved.
 - A file/order number. This number can also be found in the merchant account details for transactions processed through PrintSmith Vision.
 - The PrintSmith Vision customer account number.
-