


Integrated Credit Card and Debit Card Processing

DVMAX offers fully integrated credit and debit card processing capabilities that allow for the automatic capture of all payment information. The easy-to-use Terminal Setup Wizard lets you configure your workstation to run an EMV terminal (chip card capable) or a non-EMV terminal. You must have a persistent internet connection (not dial-up) to utilize the credit card processing feature.

Advantages to this feature include:

- No more manual processing.
- Entry mistakes, mismatched end of day reports, and the time spent correcting these are all eliminated.
- All payment information is automatically captured from credit and debit cards and processed through DVMAX.

This chapter describes how set up your workstation(s) to use the credit card processing feature and how to process a payment from an invoice, estimate or other similar transaction using credit or debit card. Batch Reports and Credit and Debit Card Transaction logs are described in this chapter as well.

 If you plan to have more than one pay terminal set up at your location, each terminal must have its own set up. DVMAX also includes an option for multiple merchant accounts if needed. See **About the Payment Terminal Setup Wizard** for more information.

Setting Up Integrated Credit and Debit Card Processing: An Overview

With DVMAX's integrated credit card and debit card payment processing functions, transactions are authorized in real time using supported gateway(s) via an internet connection. To enable the credit and debit card processing feature, you need to complete three main steps:

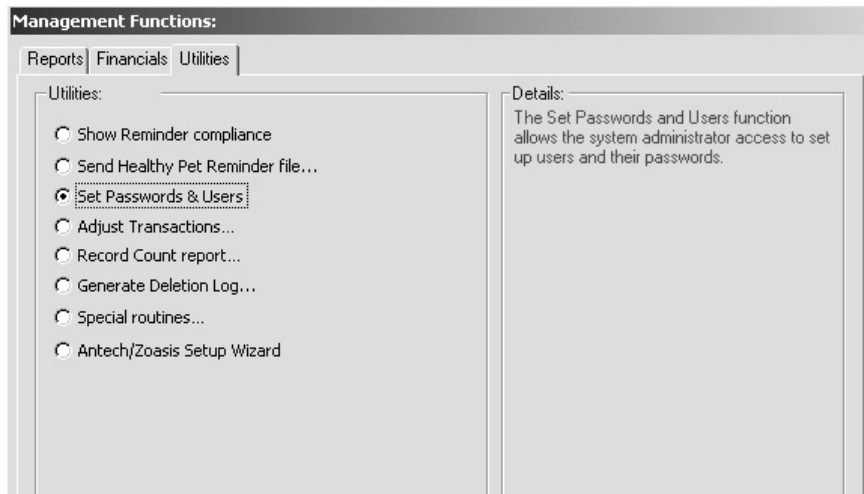
- Assign DVMAX users proper security access to allow them to accept credit and debit card payments.
- Connect the hardware peripherals to the Payment Terminal workstation(s), where applicable.
- Run the Payment Terminal Setup Wizard to configure the payment terminal(s).

Assign Security Group Access to Users for Credit Card Processing

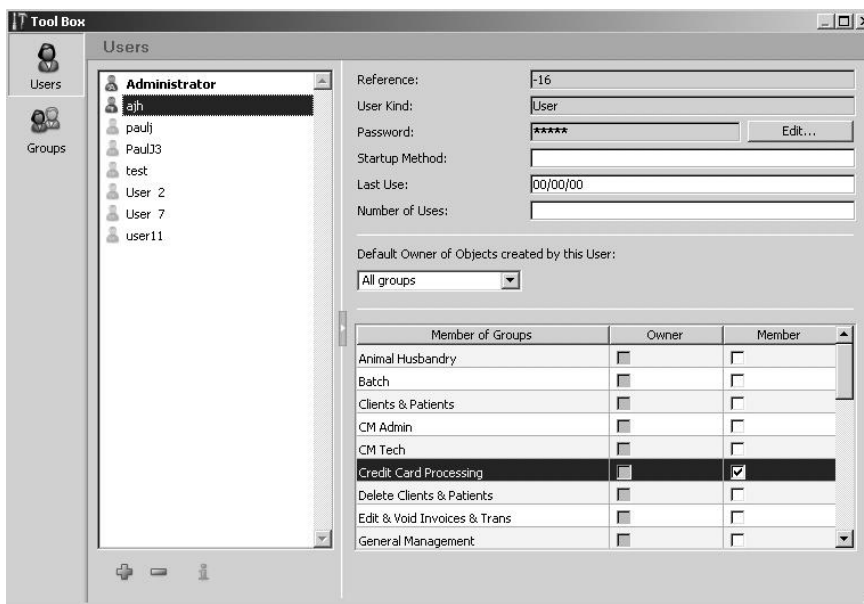
You must add users to the Credit Card Processing security group before they can process credit and debit card payments. Only users in this group are able to initiate transactions, access the setup wizard, or browse credit card processing logs.

To add users to Credit Card Processing security group:

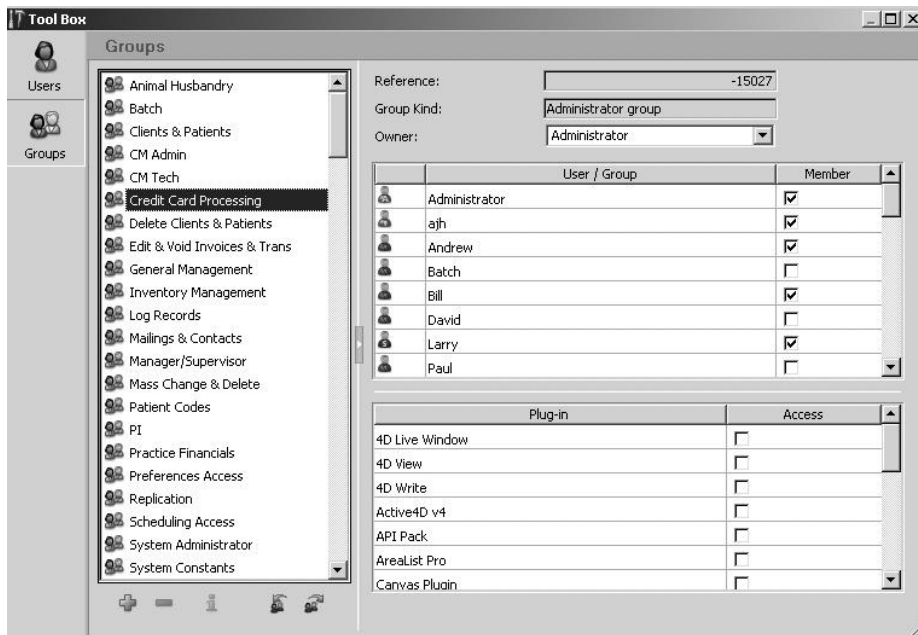
- From the **Section** menu, select **General Management**. The Management Functions dialog opens.



- Select **Set Passwords and Users**, and click **OK**. The Tool Box dialog displays.



- Select the user you wish to assign to the Credit Card Processing group. In the Member column, select the **Credit Card Processing** check box.
- Alternatively, click the **Groups** icon, select the **Credit Card Processing** group, and add users to it by selecting the check box beside their name.



- Close the Tool Box.

Connect Your Hardware Peripherals for Credit and Debit Card Processing for EMV Terminals

To be able to accept debit and credit card payments through DVMAX, you need to connect the relevant hardware peripherals. If you are running an EMV Terminal, your EMV Smart Terminal (iPP320) and Epson receipt printer need to be connected to the workstation you are setting up as a pay terminal. DVMAX supports multiple merchant accounts, so you may have more than one type of pay terminal and/or peripheral(s) in your clinic. If you are running a non-EMV Terminal, see *Connecting Your Hardware and Peripherals for Credit and Debit Card Processing for Non-EMV Terminals*.

To connect your hardware peripherals to the workstation:

- Plug the smart terminal or card reader into a USB port on the pay terminal workstation.
- Set up your receipt printer, if applicable. See supported devices under **Receipt Printer** in this chapter of the User Guide.

i You can have more than one pay terminal set up at your location but each terminal has to be set up. DVMAX also includes an option for multiple merchant accounts, if needed. See **About the Payment Terminal Setup Wizard** for more information.

i For assistance in setting up your payment terminals, contact DVMAX Technical

EMV Terminal

DVMAX supports the use of EMV Terminals (Integrated Circuit or Chip Card Capable Point of Sale Terminals). The EMV Terminal is both a card reader and a PINPad device.

Plug the EMV Terminal into an available USB port on the workstation you are configuring for EMV transactions.

You will need to install ancillary software to run an EMV Terminal. Contact IDEXX Sales at 800-283-8386, option 5 (for Payment Processing) for information on supported EVM terminals and ancillary software setup.



Receipt Printer

For credit card processing with EVMV terminals, only the network ready **Epson TM88IV** or **TM-T20** receipt printers are supported.

Epson TM88IV or TM-T20 Ethernet - Paper as per Epson specifications (Thermal Roll Paper). The Epson Printer requires an Ethernet cable to access LAN.



Connecting Your Hardware Peripherals for Credit and Debit Card Processing for Non-EMV Terminals

To be able to accept debit and credit card payments through DVMAX, you need to connect the relevant hardware peripherals. For a non-EMV Terminal, your card reader (optional), receipt printer (optional) and/or PINPad (optional) need to be connected to the workstation you are setting up as a pay terminal. Details regarding the various peripherals are noted in sections in this chapter titled **Card Swipe Track Reader, Receipt Printers** and **PINPad**. DVMAX supports multiple merchant accounts, so you may have more than one type of terminal and/or peripheral(s) in your clinic. If you are running an EMV Terminal, see *Connecting Your Hardware and Peripherals for Credit and Debit Card Processing for EMV Terminals*.

To connect your hardware peripherals to the workstation:

- Plug the card reader, where applicable, into a USB port on the pay terminal workstation.
- Set up your receipt printer, if applicable. See supported devices under **Receipt Printer** in this chapter of the User Guide.

- Plug the PINPad, if you are using one, in to a USB port on the pay terminal workstation. Be sure to install the driver for this device, where applicable, before using. The use of a Keyspan USB/serial adapter will be needed if your computer does not have a serial port.

i You can have more than one pay terminal set up at your location but each terminal has to be set up. DVMAX also includes an option for multiple merchant accounts, if needed. See **About the Payment Terminal Setup Wizard** for more information.

i For assistance in setting up your payment terminals, contact DVMAX Technical Support, or visit DVMAX online for support documents at:
<http://dvmax.com/kb/categories/External+Integration/Credit+Card+Processing/>

Card Swipe Track Reader

DVMAX supports the use of keyboard equivalent swipers, as well as a number of other card readers. You may need to install a driver for this device before using. We recommend you visit <http://dvmax.com/kb/categories/External+Integration/Credit+Card+Processing/> or contact DVMAX Technical Support for help with identifying supported card readers and installing drivers, as needed. You will need an EMV terminal if you plan to run chip card transactions. See the section titled **EMV Terminal**.



Receipt Printer

DVMAX Credit Card Processing supports the use of the **Dymo/Costar LabelWriter SE300** and **SE450**, the **Star TSP700II**, as well as the network ready **Epson TM88IV** or **TM-T20** receipt printers. *Only the Epson printers are supported for EVM Terminals.*

! If you are using a serial to ethernet adapter to connect your device, you will need to specify your IP address. Contact DVMAX Technical Support for assistance.

Dymo/Costar LabelWriter – Paper as per Dymo specifications.

Epson TM88IV or TM-T20 Ethernet - Paper as per Epson specifications (Thermal Roll Paper). The Epson Printer requires an Ethernet cable to access LAN.




Star TSP700II – Paper as per Star Micronics specifications. Be sure to install the appropriate printer driver. This printer will require a USB port.



PINPad

DVMAX supports the use of the Verifone 1000SE for non-EMV terminals. Note that this is a serial device and will require a Keyspan USB/Serial adapter if there is no serial port on the workstation you plan to use as the pay terminal. The Keyspan serial adapter driver must be installed on the system before using the adapter. For supported EMV Terminals, see the section **EMV Terminal**.



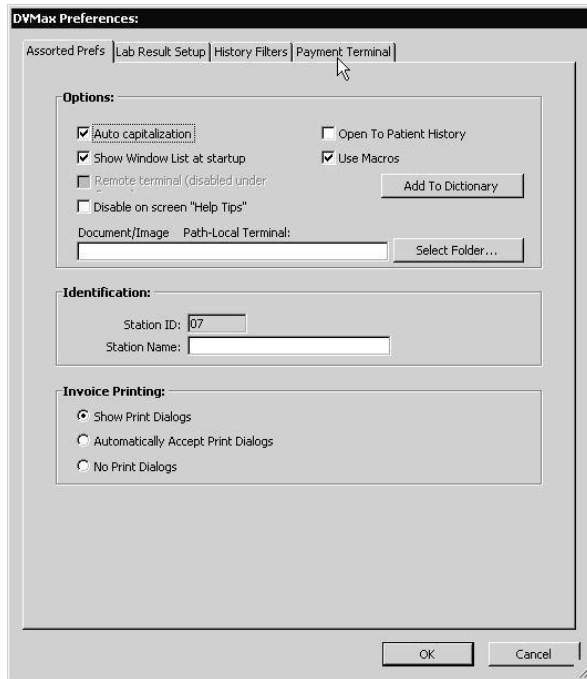
 If you are using a serial to ethernet adapter to connect your device, you will need to specify your IP address. Contact DVMAX Technical Support for assistance.

About the Payment Terminal Setup Wizard

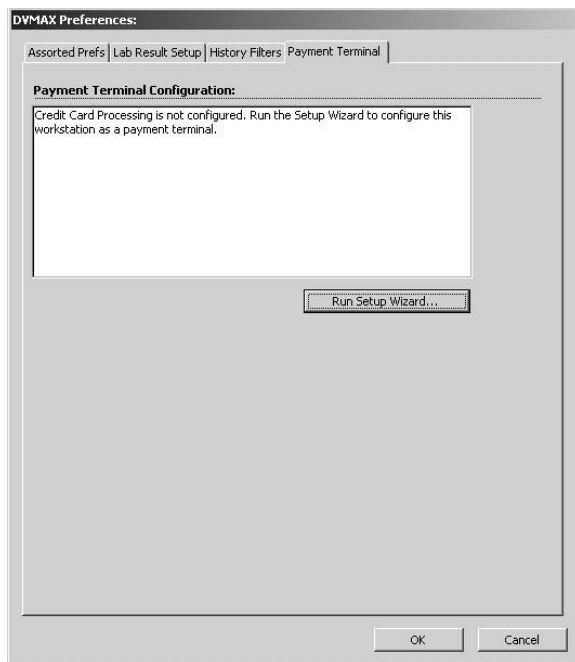
Once users have security access to credit card processing and the peripherals have been connected, a workstation can be set up as a pay terminal. The Payment Terminal Setup Wizard walks you through a simple, step-by-step process for configuring a DVMAX workstation to accept real-time credit and debit card payments. Payments are authorized in real time using supported payment gateways. Multiple payment terminals are permitted but each terminal has to have its own setup.

To open the Payment Terminal Setup Wizard:

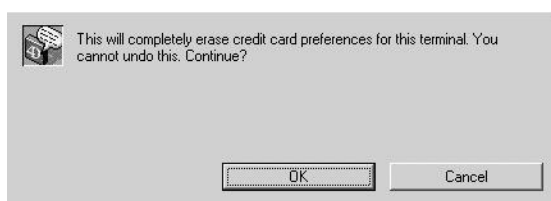
- From the DVMAX **File** menu, select **Preferences**. The DVMAX Preferences tabbed dialog opens.



- Choose the **Payment Terminal** tab.



- Click **Run Setup Wizard**. A message indicates all existing Payment Terminal information will be overwritten.
- Click **OK** to continue and proceed with Payment Terminal setup or **Cancel** to go back.



EMV Payment Terminal Setup

The following sections cover set up for EMV terminals. For information on setting up an EMV terminal, see *Non-EMV Payment Terminal Setup*.

EMV Payment Terminal Setup Wizard: Select a Payment Processor

Once you click **Run Setup Wizard** from the Payment Terminal dialog, the Payment Terminal Setup Wizard opens. The first step is to select your payment processor. From the list of options, click the radial button beside the name of the processor used by your clinic.

- If multiple merchant accounts need to be configured, select the **Multiple merchant accounts in this copy of DVMAX** check box. This prevents the Merchant ID, Authentication Key, and Terminal ID from being auto-populated, allowing you to enter per terminal values. Selecting **Multiple Merchant accounts** is particularly useful at a location that needs to have multiple, unique credit card processing accounts, such as might be the case where DVMAX has been installed to a multiple business environment.
- If the **Multiple Merchant** setting is cleared, the Merchant ID, Authentication Key, and Terminal ID will be persistent across terminals. Merchant ID, Authentication Key, and Terminal ID values will then be automatically inserted as the default values in the appropriate fields when the wizard is run on another terminal at your location.
- Only X-Charge merchant accounts can select Use EMV Terminal. If a station will be an EMV Terminal, click **Use EMV Terminal**.
- Click **Next**. Terminal Setup Wizard Step 2 of 8: Account Information page displays.

EMV Payment Terminal Setup Wizard: Account Information

The process of setting up your account information, Step 2 of 8 in the Payment Terminal Setup Wizard, will vary depending on the payment processor you use.

- On the Payment Terminal Wizard Account Information dialog (Step 2 of 8), type your X-Web ID, X-Charge Authentication Key, and X-Charge Terminal ID. You should have received these values from X-Charge.
- In the **OpenEdge EMV Token** field, enter your EMV token. You should have received this value from X-Charge.
- Click **Next**. This will take you to Step 3 of 8, Test the Connection, in the Payment Terminal Setup Wizard, Payment Terminal Setup.



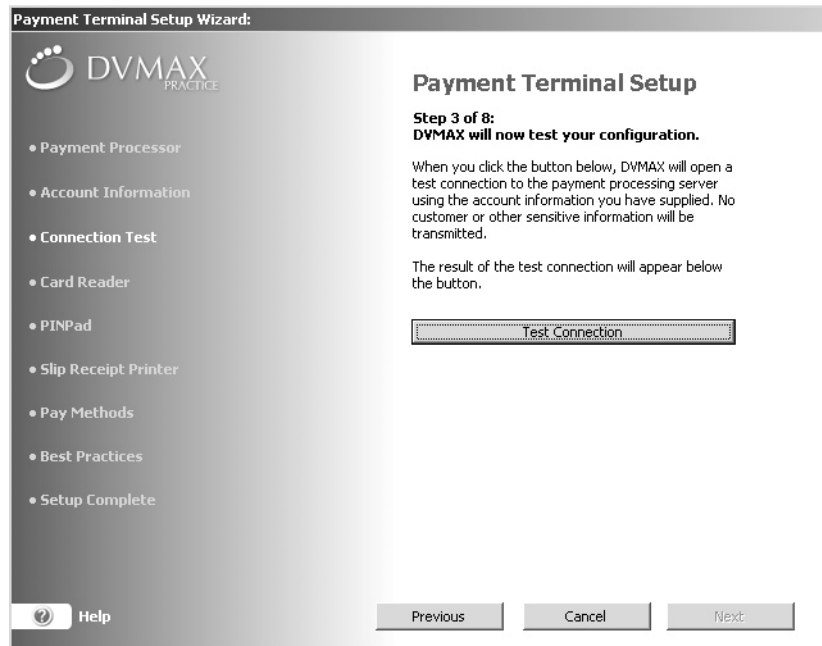
If these values have been provided on another terminal, and if **Multiple merchant accounts in this copy of DVMAX** has not been selected, all but Terminal ID and EVM Token will be pre-filled.

EMV Payment Terminal Setup Wizard: Test the Connection

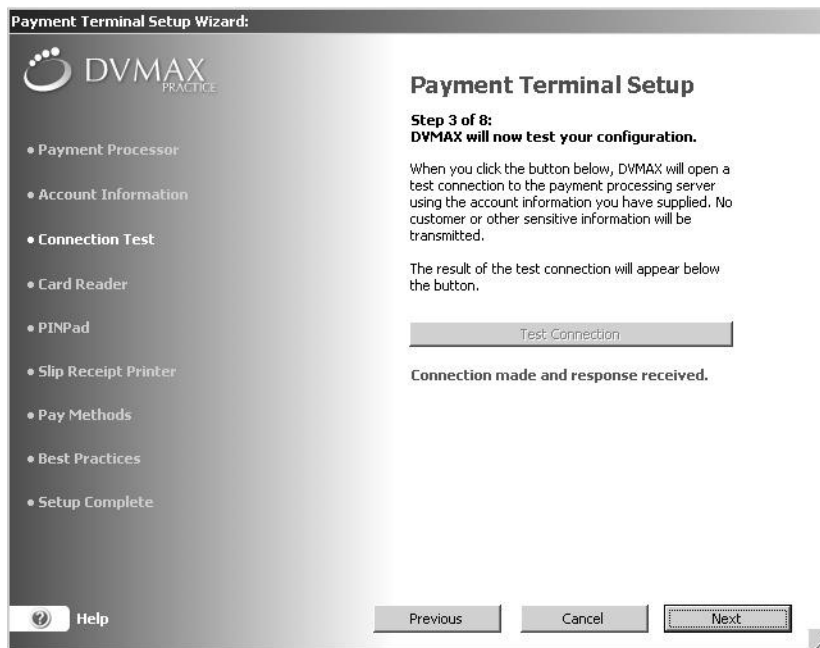
After the account information has been set up, the Terminal Setup Wizard tests the connection between your payment terminal and the payment processor. A transaction request is made to the appropriate payment gateway, and a particular response expected. No customer or other sensitive information is transmitted.

To test the connection:

- From the Payment Terminal Setup dialog window (Step 3 of 8), click **Test Connection**.



- The **Next** button is enabled only when the expected gateway response is received.
- If the connection test is successful, a message displays in green text that the connection was made and a response received.
- Click **Next**.



If a Test Connection Fails

If the test connection fails, it could mean one of the following:

- There is no internet connection.
- The payment processor host is unreachable.
- You entered correct information, but there is a problem with the payment processor host. Contact Support for your payment processor.
- You entered incorrect information, resulting in an error message. Error messages are displayed in red text.



EMV Payment Terminal Setup Wizard: Test Receipt Printer

The next step in the Payment Terminal setup is to test your receipt printer. To test your receipt printer:

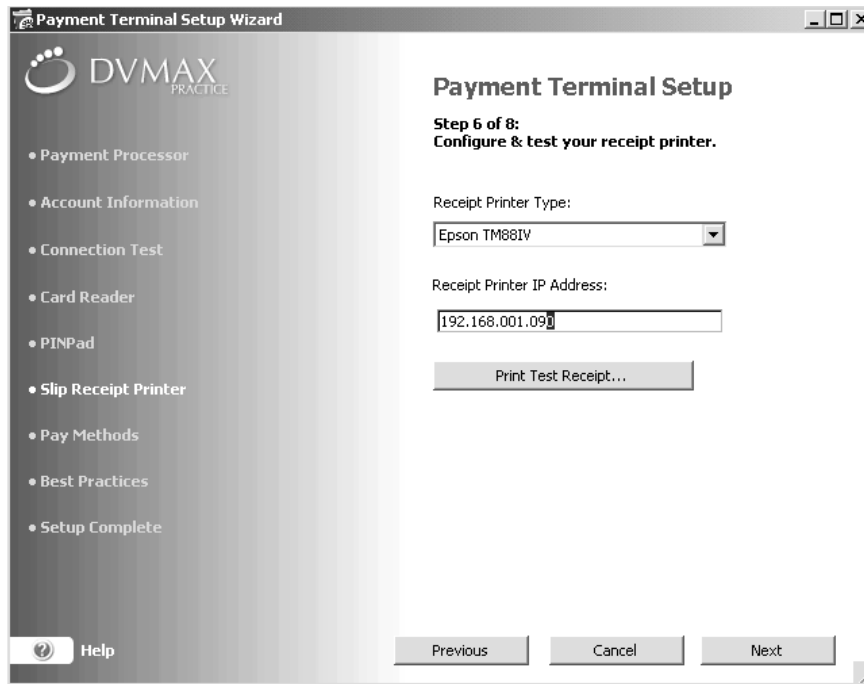
- Your receipt printer will be shown in the **Receipt Printer Type** field. For EMV Terminals, only Epson printers identified in the peripherals section of this chapter are supported.

The screenshot shows the 'Payment Terminal Setup Wizard' window. The title bar reads 'Payment Terminal Setup Wizard'. The logo for 'DVMAX PRACTICE' is in the top left. A sidebar on the left contains a list of steps: Payment Processor, Account Information, Connection Test, Card Reader, PINPad, Slip Receipt Printer, Pay Methods, Best Practices, and Setup Complete. The 'Slip Receipt Printer' step is highlighted. The main area is titled 'Payment Terminal Setup' and 'Step 6 of 8: Configure & test your receipt printer.' It features two dropdown menus: 'Receipt Printer Type' (set to 'Dymo/Costar LabelWriter') and 'Receipt Printer Port' (set to 'Alberni'). Below these is a 'Print Test Receipt...' button. At the bottom are 'Previous', 'Cancel', and 'Next' buttons. A 'Help' button is in the bottom left corner.

i The Epson printers are network-based (TCP/IP) and can be used by multiple terminals.

- If an Epson printer is chosen, the **Port** drop-down list changes to a **Receipt Printer IP Address** field. Enter the IP address of your receipt printer in the **Receipt Printer IP Address** field.

! When entering an IP address in the **Receipt Printer IP Address** field, you must supply leading zeros for each octet (for example, the IP address 192.168.1.90 must be entered as 192.168.001.090). For assistance, contact DVMAX Technical Support or visit <http://dvmax.com/kb/categories/External+Integration/Credit+Card+Processing/>.



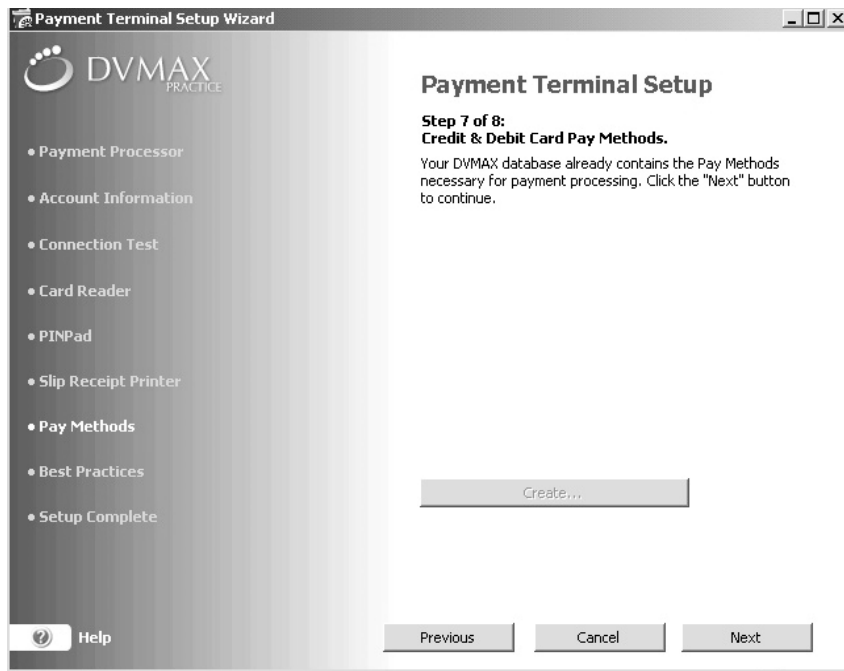
- Click **Print Test Receipt** to send a test receipt to the printer.
- Click **Next**. This takes you to the next step, identifying pay methods.

EMV Payment Terminal Setup Wizard: Create Pay Methods

The next step in setting up credit and debit card processing using the Payment Terminal Setup Wizard is to ensure pay method codes are properly created and ready for use (Step 7 of 8 in the Wizard). To enable payment processing, DVMAX needs to create 2 specially-named pay methods, one for credit card and one for debit card payments. These methods will have the abbreviations “cCard” and “Debit”, respectively. These pay method code names are automatically reserved by DVMAX for this purpose, and cannot be in use elsewhere in your DVMAX database. If they are, those existing codes will have to be renamed.

Credit and Debit Card Pay Methods Already Created

It is possible that the “cCard” and “Debit” Pay Methods were previously created via the Payment Terminal Wizard for use by another Payment Terminal at your location. In that case, the Credit and Debit Card Pay Methods dialog indicates that the pay methods already exist. Click **Next** to proceed to the next step in setup.

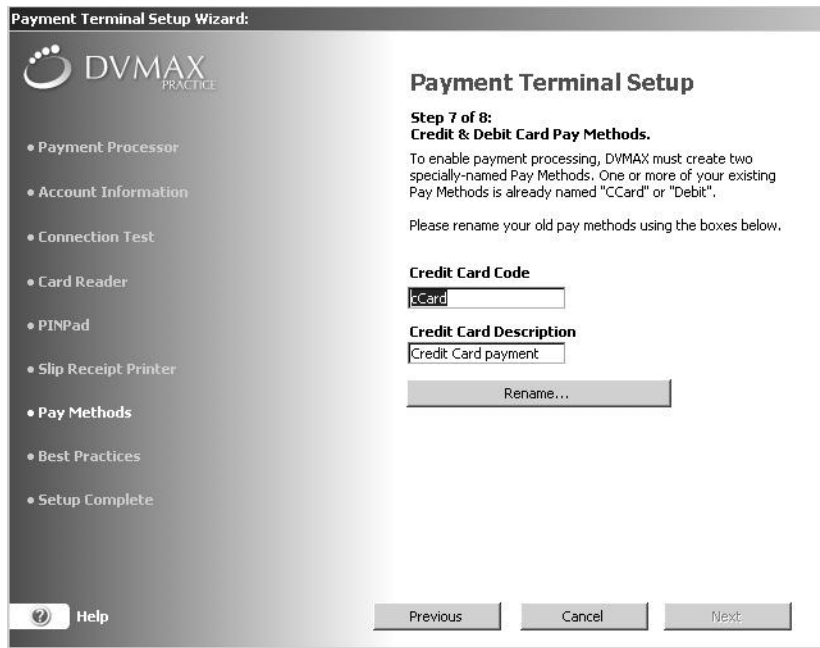


Credit and Debit Card Pay Methods Need to Be Renamed

If your DVMAX database was already using a method named "cCard" or "Debit", but the pay method was not created by the Payment Terminal Wizard for DVMAX credit and debit card transactions, DVMAX will prompt you to rename your existing codes to free up the method names "cCard" and "Debit" for use by the Pay Terminal function.

To rename the existing codes:

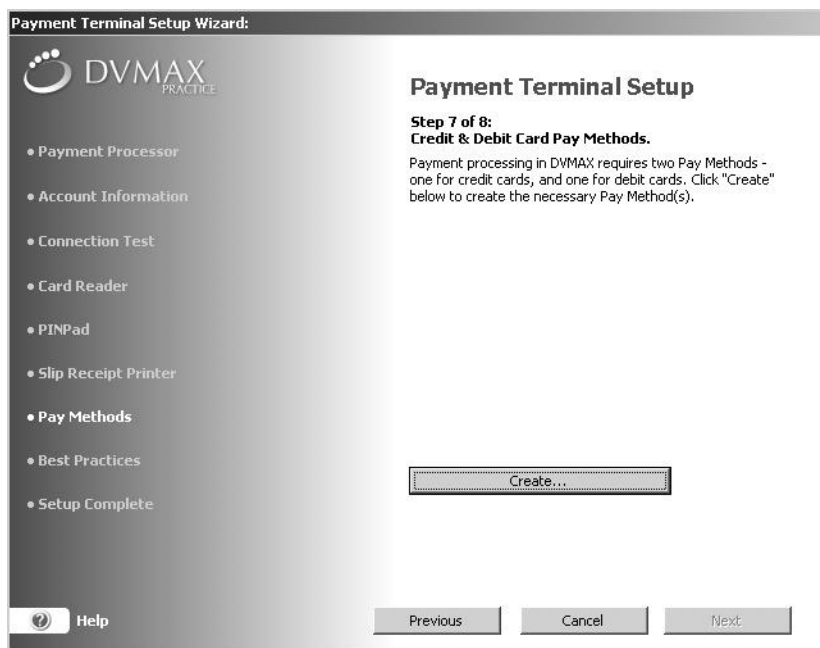
- In the Credit Card Code and/or Debit Card Code field, type a new name for the code that needs to be renamed.
- In the Credit Card Description or Debit Card Description field, type a description for the code you are renaming.
- Click **Rename**.
- Once these old codes have been renamed, DVMAX will create the necessary Pay Methods "cCard" and "Debit" for use by the Payment Terminal.
- Click **Next**.



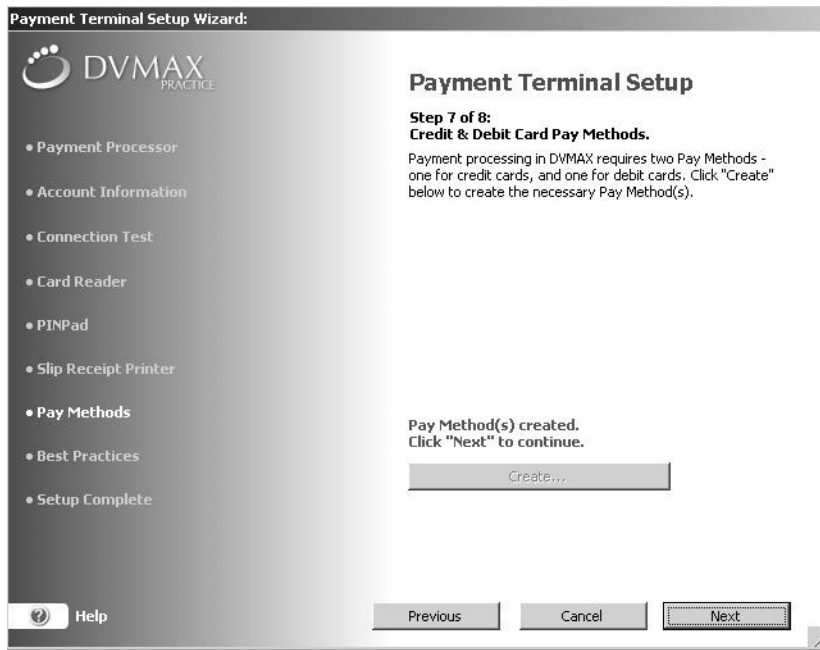
Credit and Debit Card Pay Methods Need to Be Created

If one or both pay methods need to be created:

- From the Credit and Debit Card Pay Methods dialog, click **Create**.



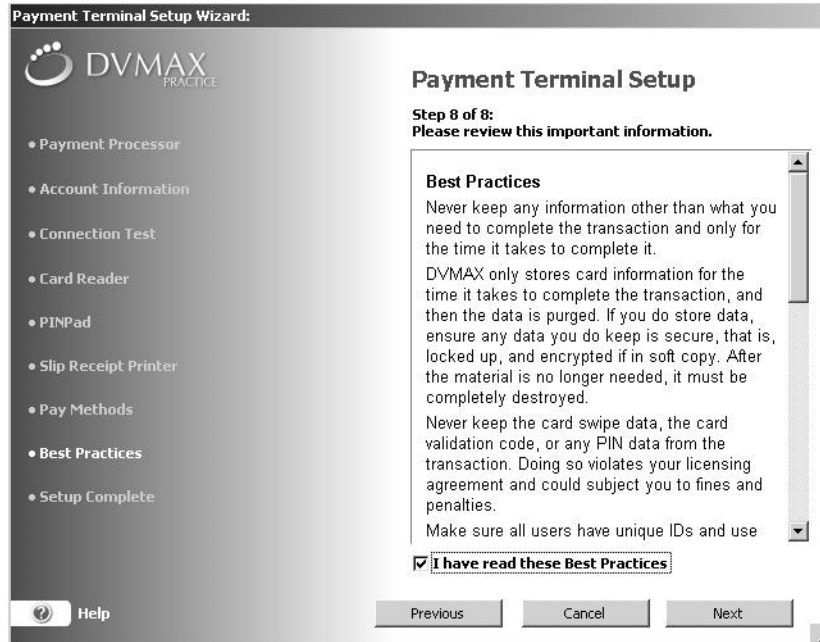
- You will receive a message on the page when the pay methods have been successfully created.
- Click **Next**.



EMV Payment Terminal Setup Wizard: Best Practices Review and Sign Off

The Best Practices dialog provides valuable information on safeguarding the security of the data in your terminal and network.

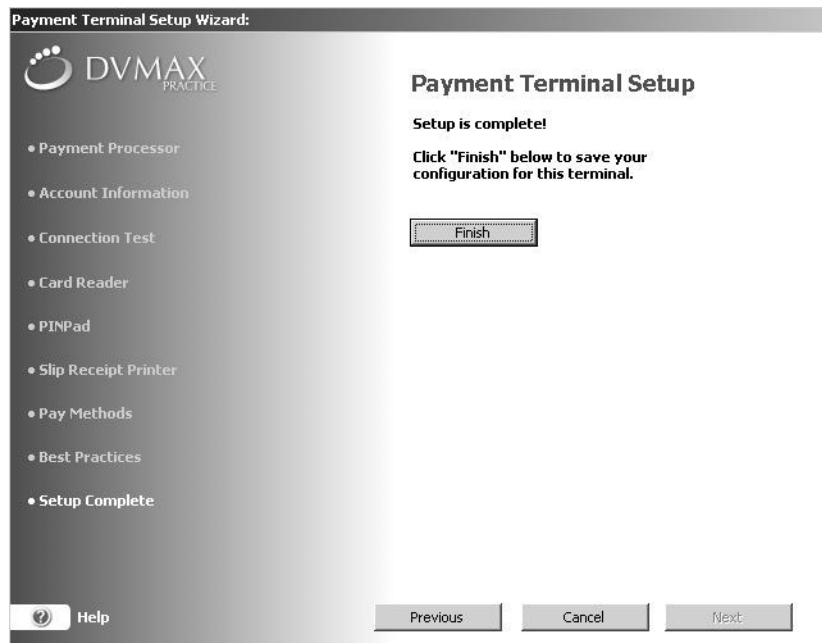
- The Best Practices page opens. Read or review the Best Practices information.



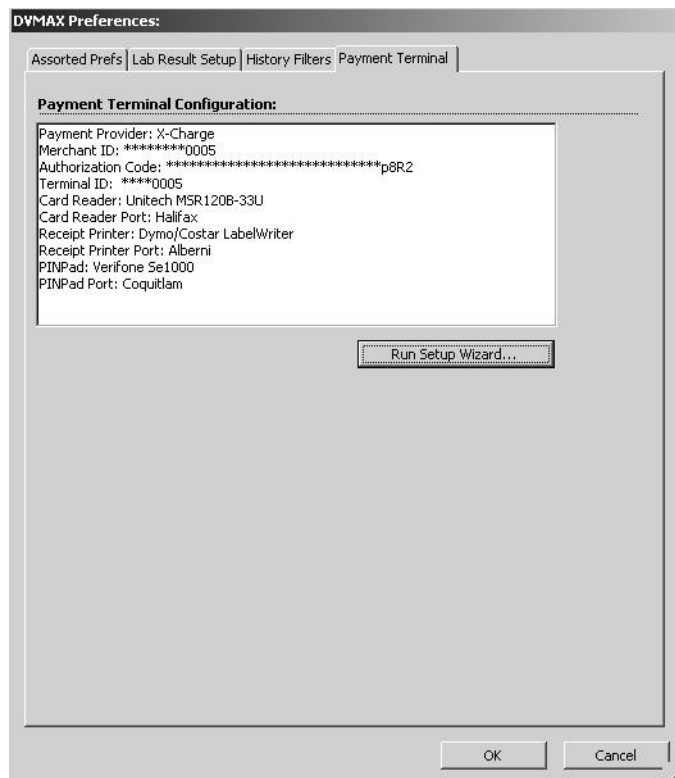
- When you have finished reading the Best Practices information, select **I have read these Best Practices**.
- Click **Next**.

Finish and Close the Payment Terminal Setup Wizard

When you have completed the basic steps in the Payment Terminal Setup Wizard, click **Finish** to close the Setup Wizard.



- The Setup Complete page displays. A summary of your Payment Terminal Configuration displays on the Payment Terminal tab of the DVMAX Preferences window.
- Click **OK** to close the window.

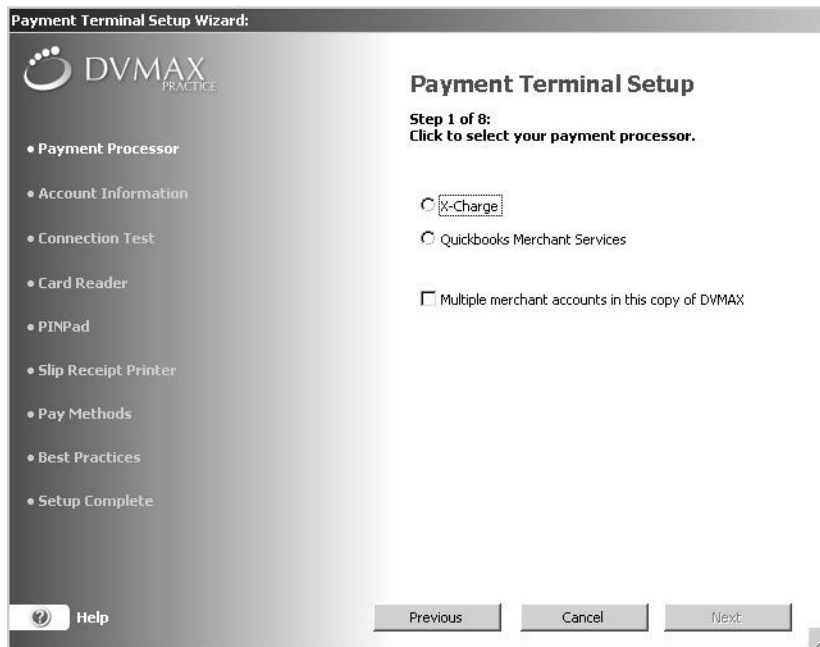


Non-EMV Payment Terminal Setup

The following sections cover set up for non-EMV terminals. For information on setting up an EMV terminal, see *EMV Payment Terminal Setup*.

Non-EMV Payment Terminal Wizard Step 1 of 8: Select a Payment Processor

Once you click **Run Setup Wizard** from the Payment Terminal dialog, the Payment Terminal Setup Wizard opens. The first step is to select your payment processor. From the list of options, click the radial button beside the name of the processor used by your clinic.



- If multiple merchant accounts need to be configured, select the **Multiple merchant accounts in this copy of DVMAX** check box. This prevents the Merchant ID, Authentication Key, and Terminal ID from being auto-populated, allowing you to enter per terminal values. Selecting **Multiple Merchant accounts** is particularly useful at a location that needs to have multiple, unique credit card processing accounts, such as might be the case where DVMAX has been installed to a multiple business environment.
- If the **Multiple Merchant** setting is cleared, the Merchant ID, Authentication Key, and Terminal ID will be persistent across terminals. Merchant ID, Authentication Key, and Terminal ID values will then be automatically inserted as the default values in the appropriate fields when the wizard is run on another terminal at your location.
- Only X-Charge merchant accounts can select Use EMV Terminal. For more on configuring an EVM Terminal, see *EMV Payment Terminal Setup*.
- Click **Next**. Terminal Setup Wizard Step 2 of 8: Account Information page displays.

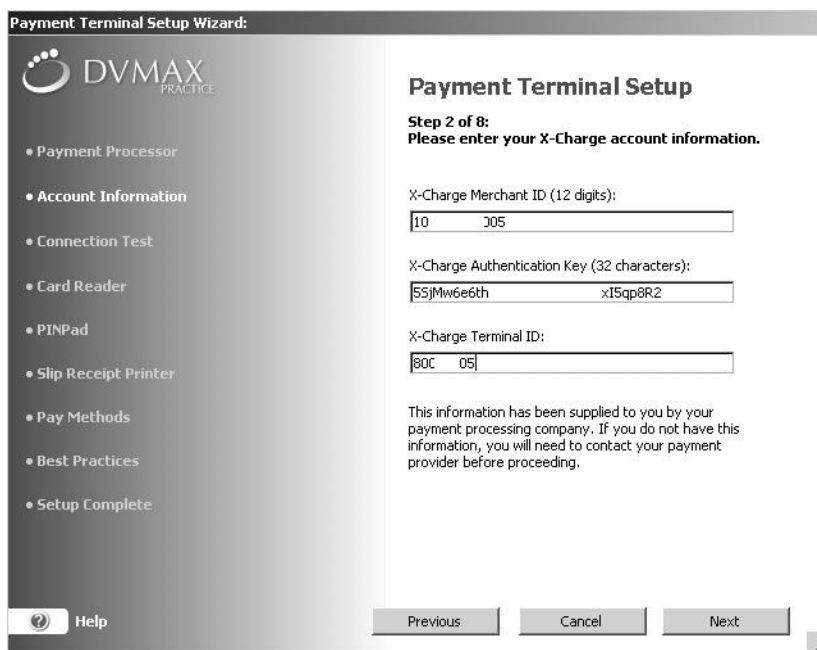
Non-EMV Payment Terminal Setup Wizard Step 2 of 8: Account Information

The process of setting up your account information, Step 2 of 8 in the Payment Terminal Setup Wizard, will vary depending on the payment processor you use.

X-Charge Customers

- On the Payment Terminal Wizard Account Information dialog (Step 2 of 8), type your X-Web ID, X-Charge Authentication Key, and X-Charge Terminal ID. You should have received these values from X-Charge.
- Click **Next**. This will take you to Step 3 of 8, Test the Connection, in the Payment Terminal Setup Wizard, Payment Terminal Setup.

i If these values have been provided on another terminal, and if **Multiple merchant accounts in this copy of DVMAX** has not been selected, all but Terminal ID will be pre-filled.



The screenshot shows the 'Payment Terminal Setup Wizard' window for 'DVMAX PRACTICE'. The current step is 'Step 2 of 8: Please enter your X-Charge account information.' The left sidebar lists various setup options, with 'Account Information' selected. The main area contains three input fields: 'X-Charge Merchant ID (12 digits)' with the value '10 005', 'X-Charge Authentication Key (32 characters)' with the value '55jMw6e6th x15qp8R2', and 'X-Charge Terminal ID' with the value '80C 05'. A note below the fields states: 'This information has been supplied to you by your payment processing company. If you do not have this information, you will need to contact your payment provider before proceeding.' At the bottom, there are 'Previous', 'Cancel', and 'Next' buttons, along with a 'Help' button in the bottom-left corner.

i If these values have been provided on another terminal, and if **Multiple merchant accounts in this copy of DVMAX** has not been selected, all but Terminal ID and EVM Token will be pre-filled.

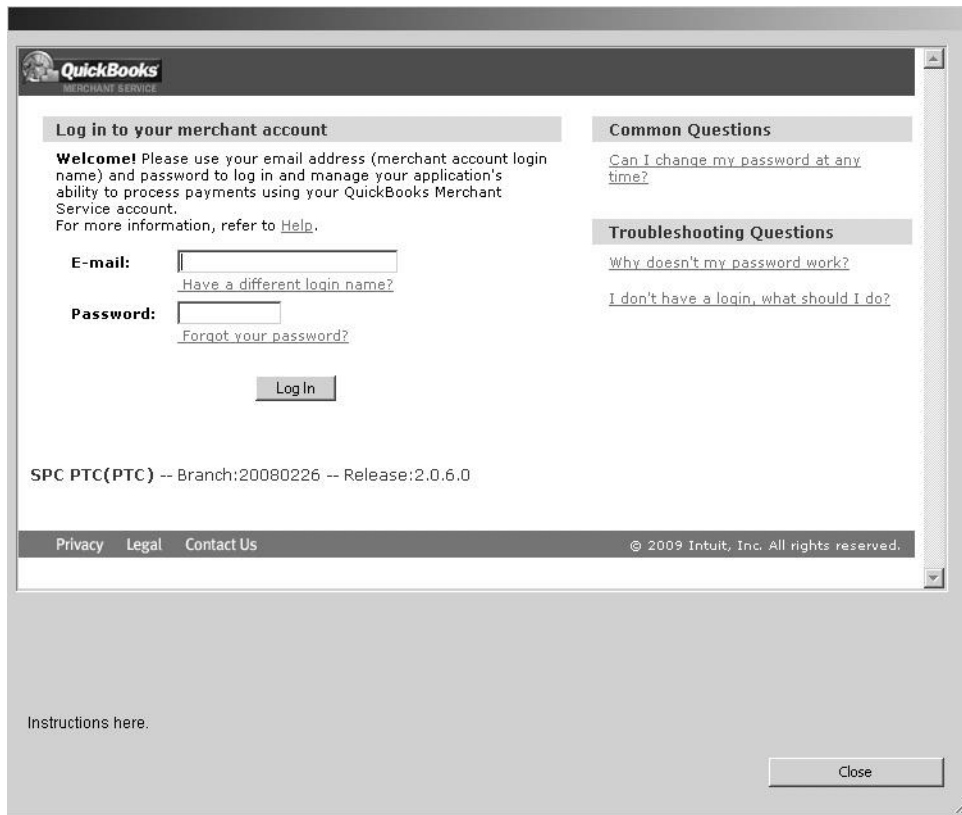
Quickbooks Merchant Services Intuit Customers

- On the Payment Terminal Wizard Account Information dialog box (Step 2 of 8), enter the **Connection Ticket**. You should already have received this from Quickbooks Merchant Services (Intuit).
- Click **Next**. This will take you to Step 3 of 8, Test the Connection, in the Payment Terminal Setup Wizard, Payment Terminal Setup.
- If you have not set up your Quickbooks Merchant Services/Intuit account and do not have a connection ticket for DVMAX, you will need to obtain a connection

ticket for DVMAX before you can proceed further with the Payment Terminal Setup.

- Click **Get Connection Ticket**. A Confirm dialog box opens. To get a ticket, you will need to visit Quickbooks’/Intuit’s Merchant Account website. You must have your Intuit log in details ready, along with the confirmation email you would have received from Intuit.

- Click **I have a LOGIN** if you wish to continue.
- Click **Cancel** to quit the installation if you do not have your Intuit Login created and/or have not received a confirmation email from Intuit.
- If you clicked **I have a LOGIN**, a page will display to allow you to log in to your Quickbooks Merchant Services (Intuit) Account. Enter your Merchant Account login details, including **E-mail** and **Password** information, and click **Log In**.
- Follow the directions on the Intuit site to obtain a ticket. Once you obtain a connection ticket for DVMAX, copy this connection ticket to the system clipboard. Return to the DVMAX Payment Terminal Setup Wizard and paste the ticket into the **Connection Ticket** field.



First Data/Rapid Connect Customers

- On the Payment Terminal Wizard Account Information dialog (Step 2 of 8), type your First Data/Rapid Connect Merchant ID, your Datawire Secure Transport ID (DID), your Terminal ID and your Group ID. You should have received these values from First Data/Rapid Connect.
- Click **Next**. This will take you to Step 3 of 8, Test the Connection, in the Payment Terminal Setup Wizard, Payment Terminal Setup.

QuickTime™ and a
decompressor
are needed to see this picture.

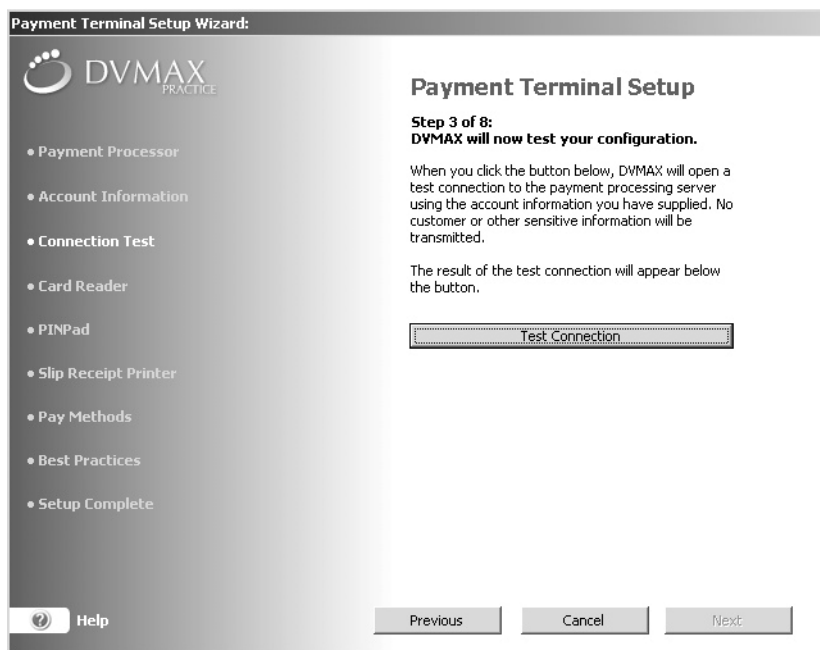
i If these values have been provided on another terminal, all but Terminal ID will be pre-filled.

Non-EMV Payment Terminal Setup Wizard Step 3 of 8: Test the Connection

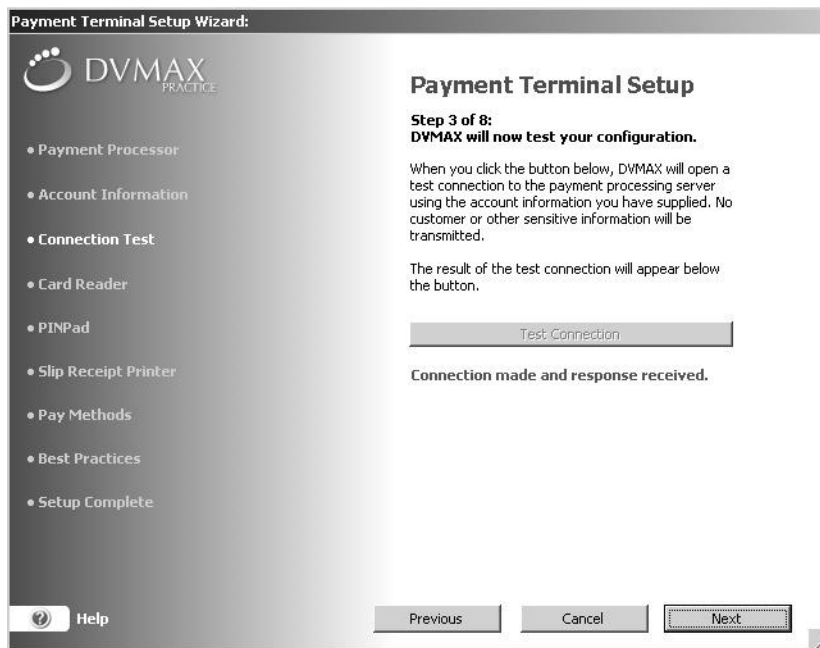
After the account information has been set up, the Terminal Setup Wizard tests the connection between your payment terminal and the payment processor. A transaction request is made to the appropriate payment gateway, and a particular response expected. No customer or other sensitive information is transmitted.

To test the connection:

- From the Payment Terminal Setup dialog window (Step 3 of 8), click **Test Connection**.



- The **Next** button is enabled only when the expected gateway response is received.
- If the connection test is successful, a message displays in green text that the connection was made and a response received.
- Click **Next**.



If a Test Connection Fails

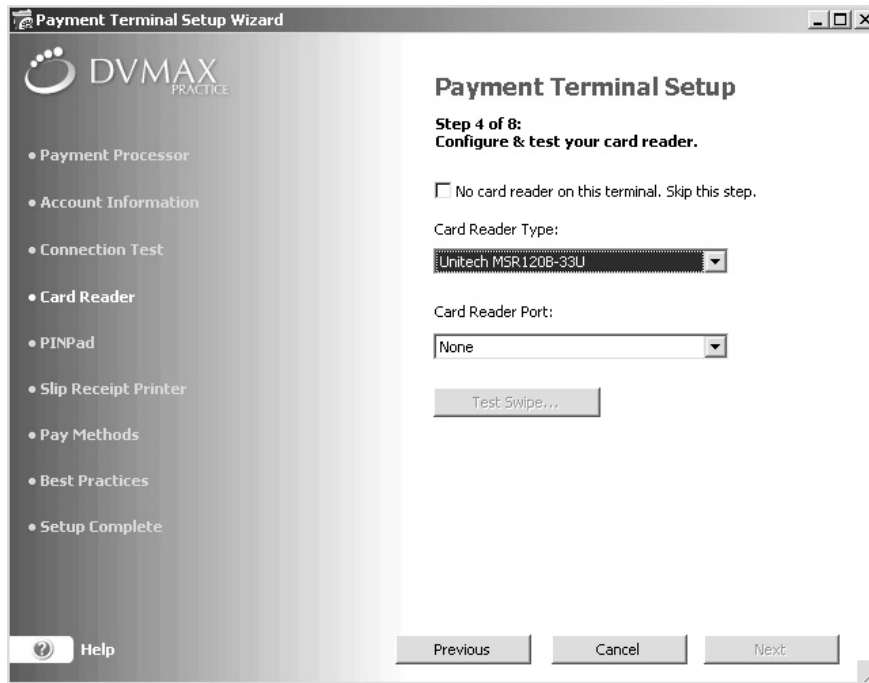
If the test connection fails, it could mean one of the following:

- There is no internet connection.
- The payment processor host is unreachable.
- You entered correct information, but there is a problem with the payment processor host. Contact Support for your payment processor.
- You entered incorrect information, resulting in an error message. Error messages are displayed in red text.

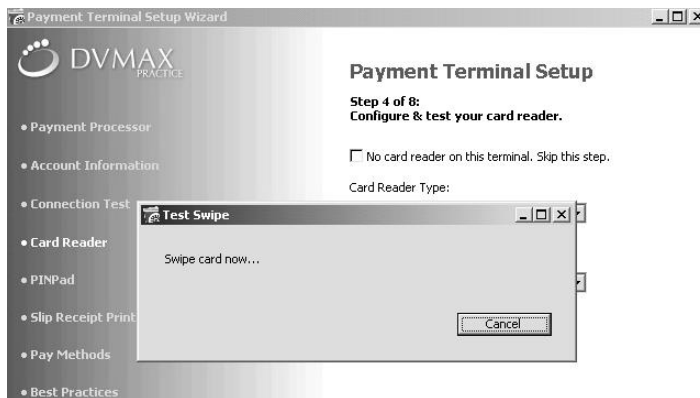


Non-EMV Payment Terminal Setup Wizard Step 4 of 8: Configure and Test Card

The next step in the setup process is to configure and test your card reader. The card reader is optional, and not all payment terminals will necessarily make use of a card reader. *You will not see this step if you are configuring an EMV Terminal.*




- If your payment terminal does not use a card reader, select **No Card Reader on this Terminal** and click **Next**.
- If you have a card reader on the terminal, select your card reader type from the **Card Reader Type** drop-down menu.
- Select the card reader port from the **Card Reader Port** drop-down menu.
- When your card reader and port have been set, the **Test Swipe** button becomes enabled. To test the card reader, click **Test Swipe**.



- Swipe the card through the card reader. You should see a message that the card has been read successfully.
- Click **OK**.



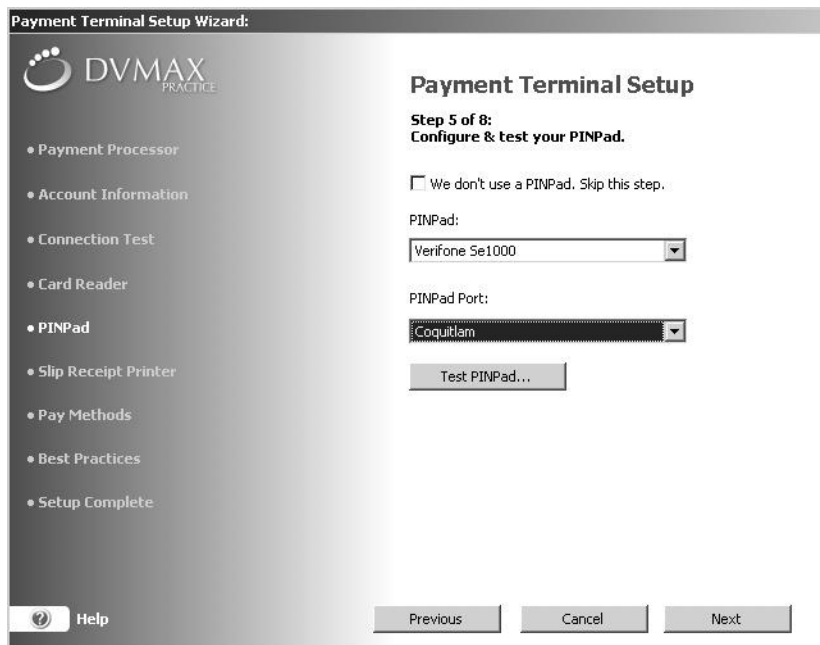
- Click **Next**. Step 5 of 8: Configure and Test Your PINPad page opens.

 You will not see this step if you are configuring an EMV Terminal.

Non-EMV Payment Terminal Setup Wizard Step 5 of 8: Configure and Test PINPad

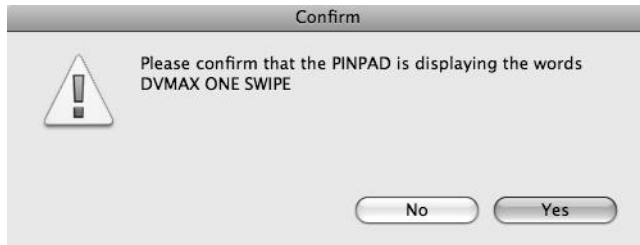
If your payment terminal uses a PINPad, the next step in the Payment Terminal setup is to identify and test your PINPad. *You will not see this step if you are configuring an EMV Terminal.*

- If you do not use a PINPad, select **We don't use a PINPad** and click **Next** to move to the next step in the setup process.



- If you use a PINPad for debit card transactions, select the PINPad from the **PINPad** drop-down list. DVMAX supports Verifone SE1000 PINPad.
- Select the port to which the PINPad is attached from the **PINPad Port** drop-down list.
- Click **Test PINPad**.
- The screen on your PINPad should read “DVMAX ONE SWIPE”.
- From the Confirm window, click **Yes** if you see the “DVMAX ONE SWIPE” message in the PINPad.

- If you do not see the “DVMAX ONE SWIPE” message on your PINPad, click **No**. Check that all hardware is connected properly to your pay terminal, and try again.

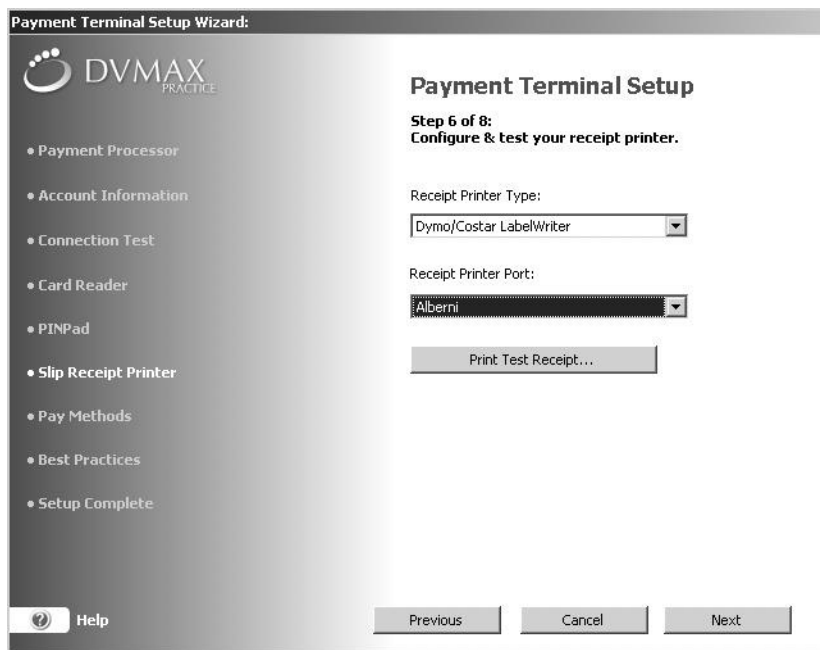


- From the Configure and Test Your PINPad dialog, click **Next**.

Non-EMV Payment Terminal Setup Wizard Step 6 of 8: Configure and Test Receipt Printer

The next step in the Payment Terminal setup is to configure and then test your receipt printer. To configure and test your receipt printer:

- Select your receipt printer from the **Receipt Printer Type** drop-down list.

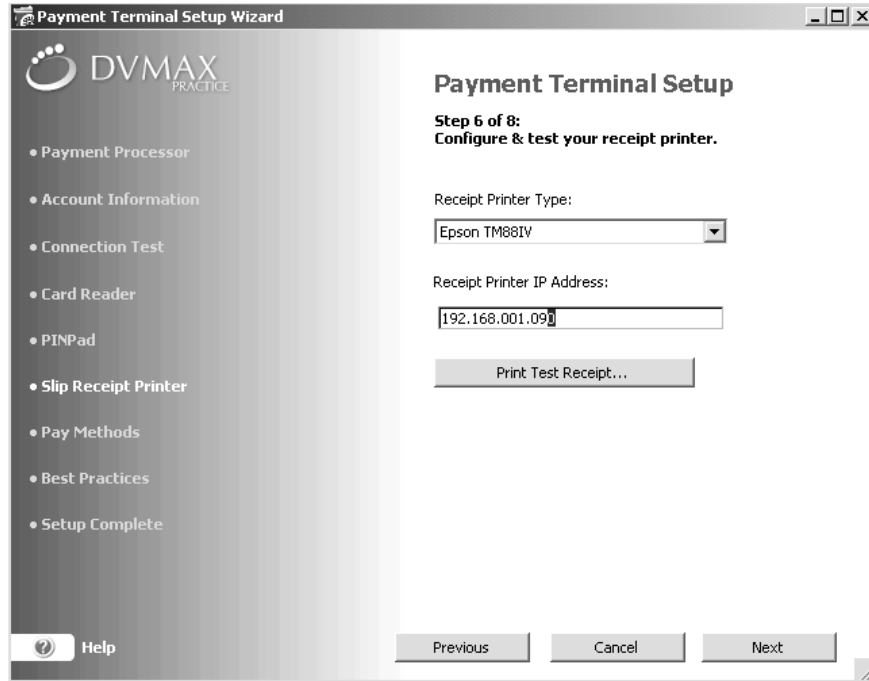


i The Epson printers are network-based (TCP/IP) and can be used by multiple terminals.

- If a LabelWriter is selected, choose the port the printer is connected to from the **Receipt Printer Port** drop-down list.
- If an Epson printer is chosen, the **Port** drop-down list changes to a **Receipt Printer IP Address** field. Enter the IP address of your receipt printer in the **Receipt Printer IP Address** field.

! When entering an IP address in the **Receipt Printer IP Address** field, you must supply leading zeros for each octet (for example, the IP address 192.168.1.90 must be

entered as 192.168.001.090). For assistance, contact DVMAX Technical Support or visit <http://dvmax.com/kb/categories/External+Integration/Credit+Card+Processing/>.



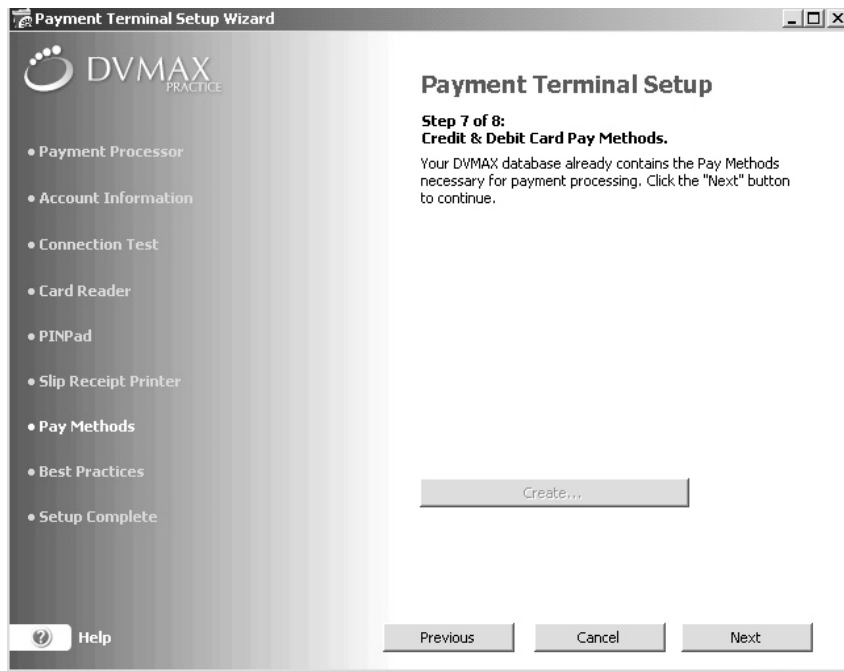
- Click **Print Test Receipt** to send a test receipt to the printer.
- Click **Next**. This takes you to step 7 of 8, identifying pay methods.

Non-EMV Payment Terminal Setup Wizard Step 7 of 8: Credit Card and Debit Card Pay Methods

The next step in setting up credit and debit card processing using the Payment Terminal Setup Wizard is to ensure pay method codes are properly created and ready for use (Step 7 of 8 in the Wizard). To enable payment processing, DVMAX needs to create 2 specially-named pay methods, one for credit card and one for debit card payments. These methods will have the abbreviations “cCard” and “Debit”, respectively. These pay method code names are automatically reserved by DVMAX for this purpose, and cannot be in use elsewhere in your DVMAX database. If they are, those existing codes will have to be renamed.

Credit and Debit Card Pay Methods Already Created

It is possible that the “cCard” and “Debit” Pay Methods were previously created via the Payment Terminal Wizard for use by another Payment Terminal at your location. In that case, the Credit and Debit Card Pay Methods dialog indicates that the pay methods already exist. Click **Next** to proceed to step 8 of 8.

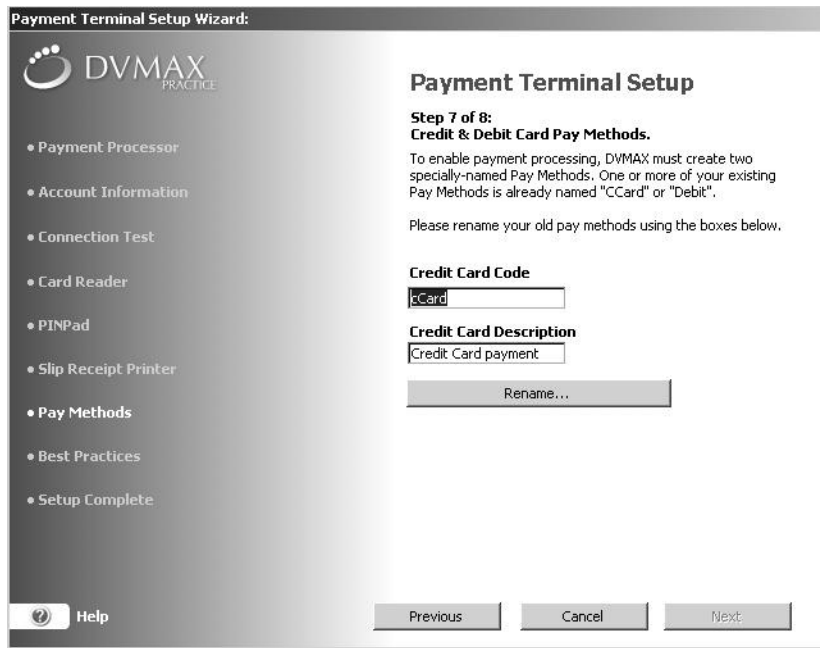


Credit and Debit Card Pay Methods Need to Be Renamed

If your DVMAX database was already using a method named "cCard" or "Debit", but the pay method was not created by the Payment Terminal Wizard for DVMAX credit and debit card transactions, DVMAX will prompt you to rename your existing codes to free up the method names "cCard" and "Debit" for use by the Pay Terminal function.

To rename the existing codes:

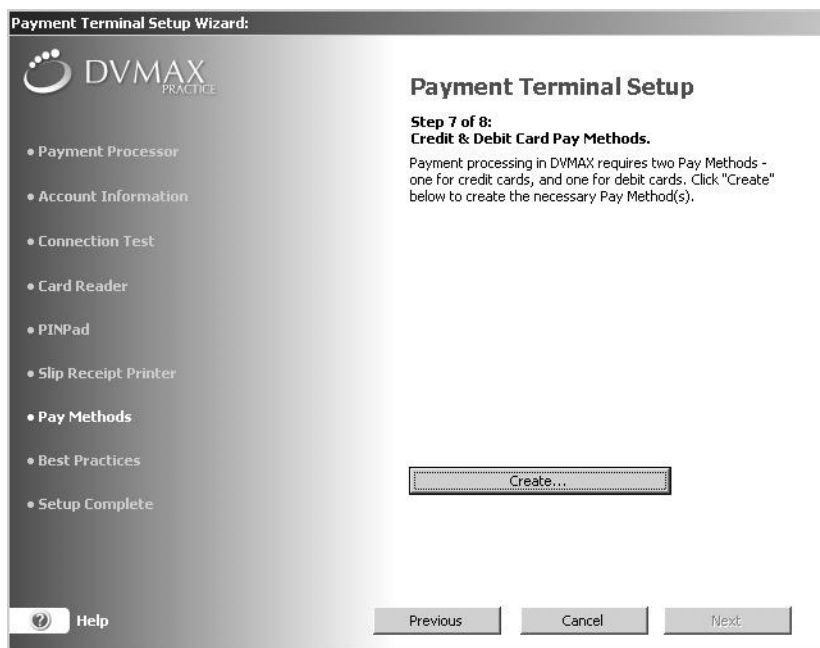
- In the Credit Card Code and/or Debit Card Code field, type a new name for the code that needs to be renamed.
- In the Credit Card Description or Debit Card Description field, type a description for the code you are renaming.
- Click **Rename**.
- Once these old codes have been renamed, DVMAX will create the necessary Pay Methods "cCard" and "Debit" for use by the Payment Terminal.
- Click **Next**.



Credit and Debit Card Pay Methods Need to Be Created

If one or both pay methods need to be created:

- From the Credit and Debit Card Pay Methods dialog, click **Create**.



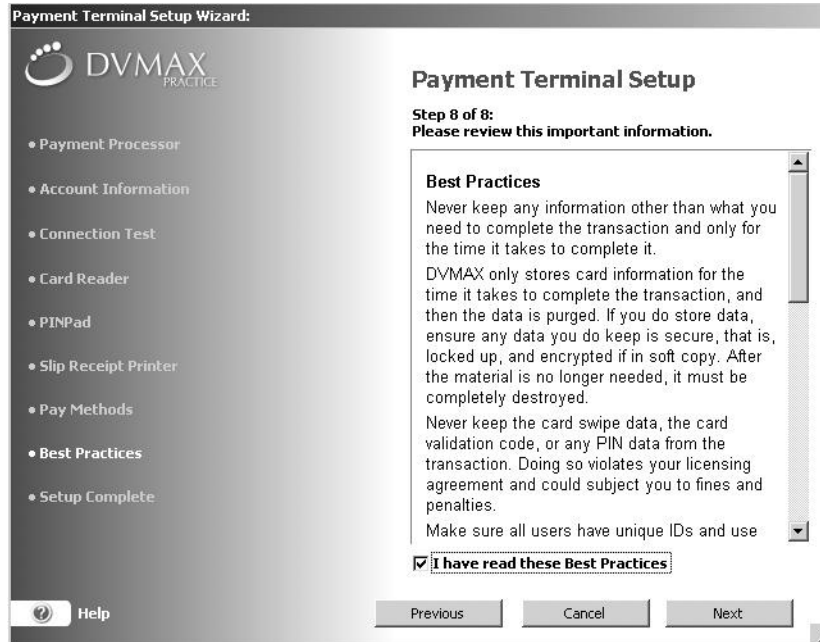
- You will receive a message on the page when the pay methods have been successfully created.
- Click **Next**.



Non-EMV Payment Terminal Setup Wizard Step 8 of 8: Best Practices Review and Sign Off

The Best Practices dialog provides valuable information on safeguarding the security of the data in your payment terminal and network.

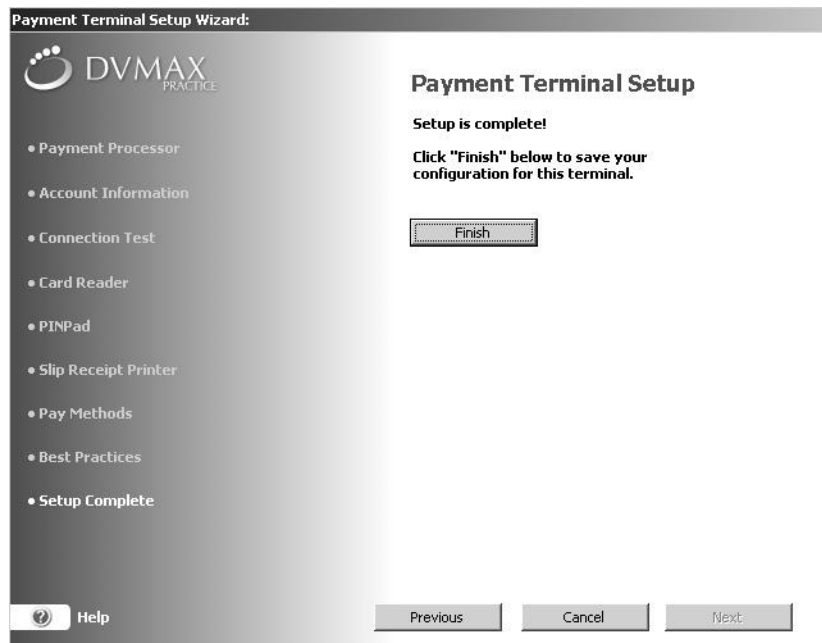
- The Best Practices page opens. Read or review the Best Practices information.



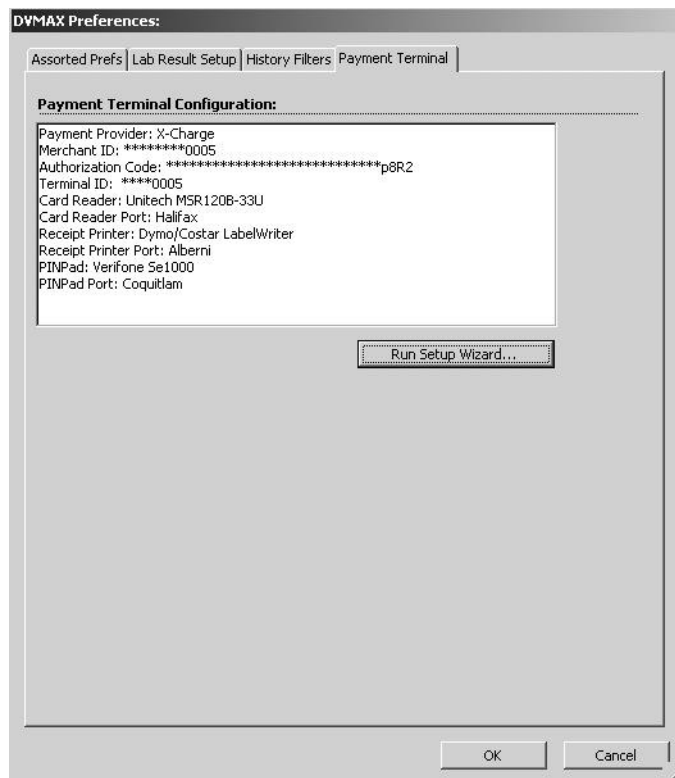
- When you have finished reading the Best Practices information, select **I have read these Best Practices**.
- Click **Next**.

Finish and Close the Payment Terminal Setup Wizard

When you have completed the 8 basic steps in the Payment Terminal Setup Wizard, click **Finish** to close the Setup Wizard.



- The Setup Complete page displays. A summary of your Payment Terminal Configuration displays on the Payment Terminal tab of the DVMAX Preferences window.
- Click **OK** to close the window.



Processing a Credit or Debit Card Payment Using the Payment Terminal

Once you have your payment terminal(s) set up, you are ready to process real-time credit card and debit card transactions within DVMAX, including:

- As payment method on an invoice (see **Invoicing** in the User Guide for more on working with invoices)
- As a deposit method for estimates (see **Estimates** in the User Guide for more on working with estimates)
- As payment method for OTC invoicing (see **Invoicing** in the User Guide for more on working with OTC invoices)
- As a payment method via **Add New Transaction** from the **Client** menu in a client record.
- As a payment method when entering batch payments from **Batch Payments** under the **Special** menu on the DVMAX main screen.
- As a refund method when processing a return (see **Writing Returns** in the User Guide for more on working with returns).

Processing a payment, return or deposit using the integrated credit card feature is nearly identical to using any other pay method in DVMAX, such as cash or check, with the addition of one extra step. When you choose cCard or Debit as a pay method, a **Process Payment Now** button appears beside the Pay Method amount field, and you need to click that button to proceed with the transaction.

i Remember, you must configure DVMAX to accept credit and debit card transactions, including running the Payment Terminal Setup Wizard to set up a payment terminal, before you can use the credit and debit card processing functions. Review the steps required in the User Guide under the sections Assign Security Group Access, Configure Your Hardware Peripherals and About the Payment Terminal Setup Wizard for more details.

Processing a Payment from an EMV Terminal

To process a payment using credit card (**cCard** pay method) or debit (**Debit** pay method) from any area in DVMAX that displays the payment transaction:

- From the **Pay Method** drop-down list, select the pay method **cCard** for credit card or **Debit**

The screenshot shows a payment terminal interface. At the top, there are two rows for payment methods. The first row has a dropdown menu for 'Pay method 1' with a list of options: AmEx, Cash, CC, cCard (highlighted), Check, Debit, Disc, and V/Mc. To the right of this dropdown is an 'Amount' field set to '\$0.00'. Below the first row is a 'Pay note' field containing 'ajh'. The second row has a dropdown menu for 'Pay method 2' with options: AmEx, Cash, CC, cCard, Check, Debit, Disc, and V/Mc. To the right is another 'Amount' field set to '\$0.00'. Below the second row is a 'Pay note' field containing 'Thank you for choos... your health care needs.'. At the bottom, there is a 'Notes' section with text: 'We appreciate your... just to our new computer system'.

- The **Process Payment Now** button displays. Enter a payment in the **Amount** field, and click **Process Payment Now**.

Invoice #100181 for Mrs. Meridith Faulkner:

Primary Provider: Dr. Hams - H Date: 12/31/2008 Faulkner, Meridith

Qty	Date	Staff	Patient	Code	Description	Price	Ext	Tax	Disp/Admin
10.00	12/29/2008	H	Angel	Rx1125	Atarax(Hydroxyzine) 50mg tab	\$0.35	\$9.50		Dispensed
1.00	12/31/2008	H	Angel			\$0.00	\$0.00		Dispensed
1.00	12/31/2008	H	Angel			\$0.00	\$0.00		Dispensed
1.00	12/31/2008	H	Angel			\$0.00	\$0.00		Dispensed
1.00	12/31/2008	H	Angel			\$0.00	\$0.00		Dispensed
1.00	12/31/2008	H	Angel			\$0.00	\$0.00		Dispensed
1.00	12/31/2008	H	Angel			\$0.00	\$0.00		Dispensed
1.00	12/31/2008	H	Angel			\$0.00	\$0.00		Dispensed
1.00	12/31/2008	H	Angel			\$0.00	\$0.00		Dispensed
1.00	12/31/2008	H	Angel			\$0.00	\$0.00		Dispensed
1.00	12/31/2008	H	Angel			\$0.00	\$0.00		Dispensed
1.00	12/31/2008	H	Angel			\$0.00	\$0.00		Dispensed
1.00	12/31/2008	H	Angel			\$0.00	\$0.00		Dispensed
1.00	12/31/2008	H	Annel			\$0.00	\$0.00		Dispensed
1.00	12/31/2008	H	Angel			\$0.00	\$0.00		Dispensed

Buttons: Add Line Edit Line Delete Line

Pay method 1: AmEx Amount: Process Payment Now...

Pay note: AmEx

Pay method 2: Amount: \$0.00

Pay note:

Notes:

Thank you for choosing our clinic for your health care needs.
 We appreciate your patience as we adjust to our new computer system - it will help us to better server you in the future!

Subtotal: \$9.50
 Discount: \$0.00
 Taxes: \$0.00
 Total: \$9.50
 Previous Balance: (\$9.50)
 Payments: (\$9.50)
 New Balance: (\$3.50)

Buttons: OK OK & Next Cancel

Buttons: Finished Print

- Follow the prompts on the EMV terminal display to Insert, Swipe or Tap the card, or select **Manual Input** from the PINPad to run the transaction manually. This option is not available for Debit transactions.
- For manual input you will be prompted to enter card number, expiry date and CVV.
- If making a transaction that requires the client to enter a PIN number (such as with a debit transaction), present the PINPad to the customer for them to **OK** the purchase and enter their PIN.
- Clicking **Cancel** on the PINPad cancels the transaction.

Processing a Payment from a Non-EMV Terminal

To process a payment using credit card (**cCard** pay method) or debit (**Debit** pay method) from any area in DVMAX that displays the payment transaction:

- From the **Pay Method** drop-down list, select the pay method **cCard** for credit card or **Debit**

Pay method 1: Amount: \$0.00

Pay note:

Pay method 2: Amount: \$0.00

Pay note:

Notes:

Thank you for choos... your health care needs.
 We appreciate your patience as we adjust to our new computer system

- The **Process Payment Now** button displays. Enter a payment in the **Amount** field, and click **Process Payment Now**.

Processing a Payment from an EMV Terminal

To process a payment using credit card (**cCard** pay method) or debit (**Debit** pay method) from any area in DVMAX that displays the payment transaction:

- From the **Pay Method** drop-down list, select the pay method **cCard** for credit card or **Debit**

- The **Process Payment Now** button displays. Enter a payment in the **Amount** field, and click **Process Payment Now**.

- If your Pay Terminal is using a non-EMV card reader (which has already been set up under the Pay Terminal Wizard), you are prompted to **Swipe** the card, with the option of manually entering the card number for a credit card payment. Swipe the card through the card reader (where applicable), or click **Manual Input** to see the Enter Card Data dialog. No manual option is available for debit transactions.
- If you are using an EMV Terminal, follow the prompt on the EVM terminal display to Swipe, Insert or Tap the card, with the option of selecting Manual Input. For manual input, you will need the card expiry date and CVV.

- If no card reader has been set up on your non-EMV Pay Terminal, the Enter Card Data manual input dialog appears automatically.
- For manual input, on the Enter Card Data dialog, complete the cardholder information, making sure to enter the **Card Number**, **Expiry Date**, and **CCV**. You will receive error messages if the card number is not in a valid format, or if the expiry date is in the past. Where available, the client name and details will be prefilled by DVMAX. Click **Authorize** to continue and process the payment, or **Cancel** to go back.
- If making a transaction that requires the client to enter a PIN number (such as with a debit transaction), present the PINPad to the customer for them to **OK** the purchase and enter their PIN.

Enter Card Data

Card Information:

Name on Card: Denise Deel

Expiry Date: MM: 02 - February YY: 2011

Card Number: 4100000000000000

CCV:

Cardholder Information:

Address Line 1: 823 Saw Mill Lane

Address Line 2:

City/Town: Carmel

State: CA Zip: 92000

Country: US Phone: 770 555-1212

Authorize Cancel

Failed Transactions at the Processor

If a credit card transaction fails after swiping a card (other than an internet connection failure - see *Internet Failed Transactions*), DVMAX will return a message. The text of the message varies based on your payment processor and reason for transaction failure. You may try running the transaction again, try a different pay method or cancel the transaction.


Internet Failed Transactions

For the case when a credit card payment transaction fails to process because of an internet-related issue (Internet Failed), you will be prompted to store the authorization number to allow the transaction to be completed in DVMAX. The transaction will be flagged as “no online auth” so you can report on this and see which transactions need to be reconciled. The card type is already set correctly, since it is detected from the card number.

If you are processing EMV cards, please contact Open Edge in the case of internet failed transactions.

Voiding Credit Card and Debit Card Transactions

DVMAX allows to you void a credit card and debit card transactions and, where available, have the associated funds automatically returned to the client’s card.

 Depending on your payment processor, you may not be able to void a debit card transaction. In those cases, you will have to use the credit card (cCard) method to issue a refund instead to try to have funds returned to the client’s credit card, or issue a refund or return in the same way you would for a cash transaction. If it is not possible to void a Debit transaction (processed using DVMAX’s integrated credit and debit card feature), you will get an Alert notice from DVMAX indicating that you cannot perform the void.

For more information on voiding transactions, see the **Invoicing** chapter of the User Guide.

To void a credit card transaction:

- From the Finances tab of the Client record, chose the card transaction you want to void.
- Double click to select the transaction. This opens the Transaction detail dialog.
- From the **Transaction** menu, choose **Void this Entry**.
- A Confirm dialog opens. Click **Yes** to continue and void the entry, or **No** to cancel the action.
- Another Confirm dialog opens indicating that your action will create an entry in the Finance History to show that the transaction was reversed. Click **Yes** to continue or **No** to cancel.
- A third dialog opens to ask if you would like DVMAX to try to return funds to the client's card. Click **Yes** to have funds returned to the client's card. An Alert dialog lets you know if the funds were successfully returned to the client's card. If funds could not be automatically returned to the card, you must issue funds manually.
- Click **OK** from the Alert dialog to close the dialog and return to the Finances tab of the Client record. Note that an entry has been made under the Recent Finances area of the Finances tab to show that a transaction was voided.



When you try to void a card payment, DVMAX tries to perform a refund first, then do a return afterward. If both fail, DVMAX lets you know you need to run the void manually. DVMAX assumes you wanted to perform the void regardless of the method, and will post the refund/return transaction as Echg in DVMAX Client Financials to reflect the refund you process.



While individual card transactions can be automatically reversed to the client's card, voided invoices that contain debit or credit card transactions do NOT have the option of having those payments auto-reversed and it is not possible to void such an invoice. Those transactions must be refunded manually. See **Voiding an Invoice that Contains a Credit or Debit Card Transaction** for more information.


Voiding an Invoice that Contains a Credit or Debit Card Transaction

It is not possible to void an invoice that contains a credit card or debit card transaction processed on DVMAX's integrated credit card processing feature using the payment terminal. If you try to void the invoice, a message is displayed indicating that you cannot void the invoice because a debit or credit card payment was accepted on the invoice. For information on voiding other types of invoices, see the **Invoicing** chapter of the User Guide.

Writing Returns on Credit Card Transactions

Writing a return using the credit card (cCard) or Debit pay methods is effectively the same as writing a return for any other pay method (see *Writing Returns* in the User Guide for more information). When writing a return where funds will be transferred to a client's

credit or debit card, choose the appropriate pay method and follow the same process as listed under *Processing a Credit or Debit Card Payment Using the Payment Terminal*.

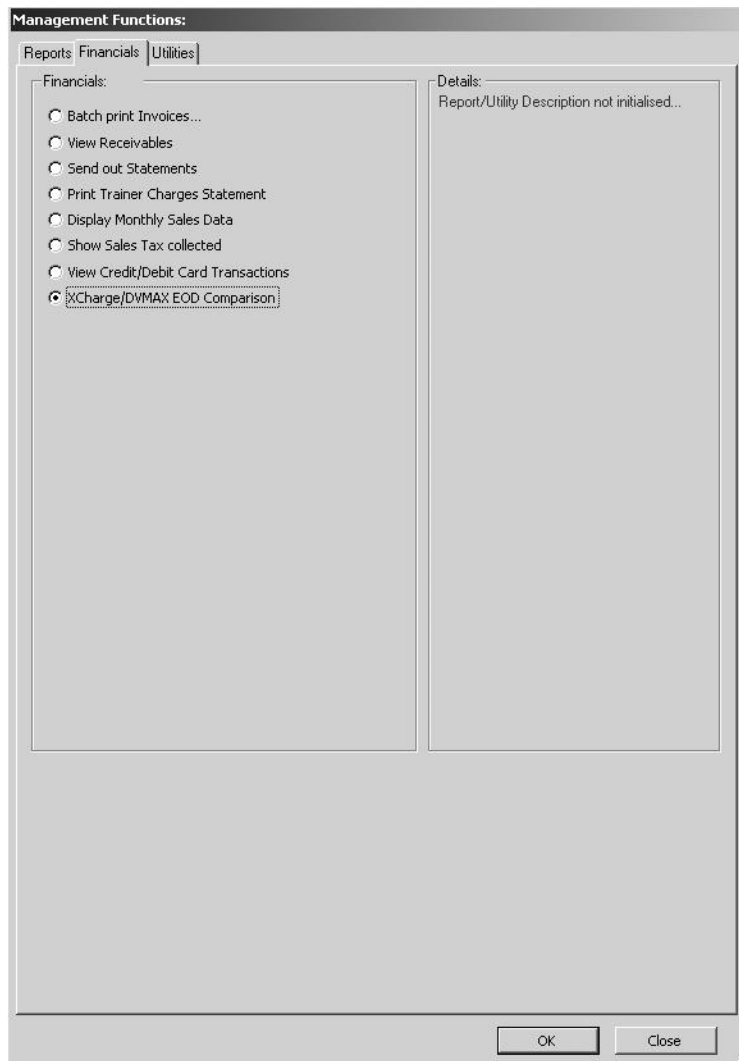
 Depending on your payment processor, you may not be permitted to perform a return on a debit card transaction. You may be asked to use credit card (cCard) to issue a refund, or perform a return by other pay method. If this is the case, when you select Debit as pay method, you will see an Alert message noting that this pay method cannot be used for a return.

Batch Reports (X-Charge Only)

DVMAX offers a batch inquiry function for X-Charge users, where an automatic end of day report compares the totals in DVMAX with the totals in the XML report from X-Charge.

To view the XCharge/DVMAX EOD Comparison report:

- From the **Section** menu, select **General Management**. The Management Functions dialog opens.
- Click the Financials tab.
- Select **XCharge/DVMAX EOD Comparison** and click **OK**.



- The XCharge/DVMAX EOD will be displayed.

Batch Settlement/Batch Close

DVMAX offers a batch settlement option, but the feature is dependent on whether your payment processor offers a Batch option.

DVMAX normally closes the batch at a set time daily, as determined by the payment processor. This is the most common (and recommended) option. Users can force a settlement (batch close) of the open batch at the payment processor. This is typically only recommended for clinics with 24hour operation. To force a settlement:

- From the **Section** menu, select **General Management**. The Management Functions dialog opens.
- Click the Financials tab.
- Select **Release Current Open Batch for Settlement** and click **OK**.
- If batch closes successfully, DVMAX will display a notice on the screen indicating a successful close and a Batch Close report will print from the receipt printer.

Accessing the Intuit Merchant Service Centre from DVMAX

Intuit Quickbooks users can securely access the Quickbooks/Intuit Merchant Service Centre from DVMAX at any time.

To access the MSC:

- From the **Section** menu, select **General Management**. The Management Functions dialog opens.
- Click the Financials tab.
- Select **Intuit Quickbooks Merchant Service Centre** and click **OK**.
- The MSC secure webpage will open in your browser.

Credit and Debit Card Transaction Logs

DVMAX logs all incoming and outgoing credit and debit card transaction requests. DVMAX audit logs are automatically enabled, and cannot be disabled. These logs can be exported and then purged. For Batch Close users, the amount of the closed batch will be reflected in the log as well.

To view the Credit and Debit Card transaction log:

- From the **Section** menu, select **General Management** and go to the Financials tab.
- Select **View Credit/Debit Card Transactions** and click **OK**.

Management Functions:

Reports Financials Utilities

Financials:

- Batch print Invoices...
- View Receivables
- Send out Statements
- Print Trainer Charges Statement
- Display Monthly Sales Data
- Show Sales Tax collected
- View Credit/Debit Card Transactions
- XCharge/DWMAX EOD Comparison

Details:

The Show Sales Tax collected function lists all current Sales Tax records.

OK

Close