

PrintSmith Vision  
CardConnect® Integration

Version 4.1.0  
July 2018

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EFI PrintSmith Vision | *CardConnect® Integration*

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## Introduction

CardConnect® Integration allows you to receive payments and deposits using the customer's credit card. You can receive a payment for an invoice, receive an on-account payment, generate a refund or void a transaction. On the Cash Register page you can receive a payment for an invoice, departmental sales and void a transaction. On the invoice page you can receive a deposit, void the deposit and void the invoice payment.

## Contact Information

### EFI Support

<b>Web Site:</b>	<a href="https://customer.efi.com/support">https://customer.efi.com/support</a>
<b>US Phone:</b>	1.855.EFI.4HLP 480.538.5800
<b>UK Phone:</b>	+44 (0) 800.783.2737
<b>EU Phone:</b>	+49.2102.745.4500

**E-Mail:** [Printsmith.support@efi.com](mailto:Printsmith.support@efi.com)

Regular US Service Desk hours are 7 A.M. to 5 P.M. Mountain Standard Time, Monday – Friday

Regular UK Service Desk hours are 8 A.M. to 5 P.M. Greenwich Mean Time, Monday – Friday

Regular EU Service Desk hours are 9 A.M to 6 P.M. Central European Time, Monday – Friday

Outside of these hours, you may leave a voice mail message and an on-call support representative will be paged. Response time is based on the severity of the issue.8

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

### EFI Professional Services

<b>US Phone:</b>	651.365.5321
<b>US Fax:</b>	651.365.5334
<b>US E-Mail:</b>	ProfessionalServicesOperations@efi.com
<b>Outside US E-Mail:</b>	EMEAProfessionalServicesOperations@efi.com

EFI Professional Services can help you perform EFI software installations and upgrades. This group can also help you implement, customize, and optimize your EFI software, plus offers a range of training options.

## System requirements

### Client Requirements

PrintSmith Vision Client Requirements (one on which PrintSmith Vision is not installed) are:

- Operating system: Windows 7, 8, or 10
- Macintosh OS X 10.13 (High Sierra) or higher
- Memory: 4 GB minimum (more memory will improve performance)

### Browser Requirements

OS	Browser	Browser Version	Comments
Windows 10 Professional  Windows 2008 R2 Standard	Google chrome	Version 68.0.3440.75 (64 bit)	Certified
	Mozilla	61.0.1 (64-bit)	Certified
	Microsoft Edge	40	Certified
Mac OS 10.13 (High Sierra)	Safari	11.0 (13604.5.6)	Certified
	Chrome	Version 65.0.3325.181 (64 bit)	Certified
iOS 11.0.3 (15a432)  iPad	Safari	11.0 (13604.1)	Certified
	Chrome	62.0.3202.60	Certified

### Monitor and Resolution Requirements

PrintSmith Vision is designed to be viewed and used on a large monitor with high resolution:

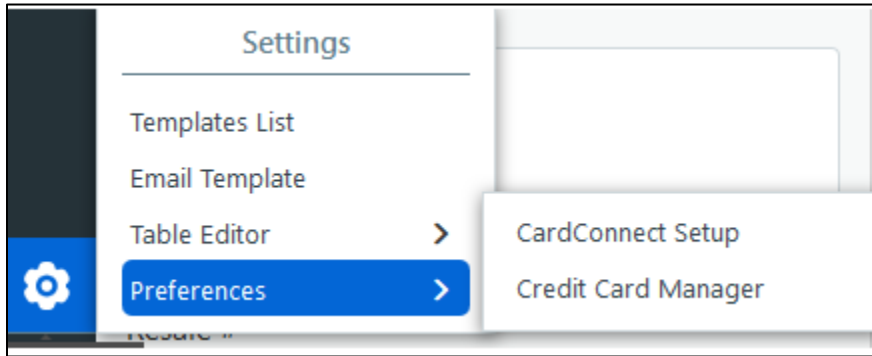
- 19-inch monitor
- Minimum resolution of 1280 x 1024

Note: Important If you are using a laptop, to see estimates and invoices in full, the height (second number) must be at least 1024 pixels.

## Setting up CardConnect®

CardConnect® setup can be done only through HTML UI in the Setting>Preferences>CardConnect® Setup

Note Users must have permissions set to access these preferences



## CardConnect® Setup

### CardConnect Setup

Enable CardConnect Integration

CardPointe Gateway URL

User Name

Password

---

Blot URL

Merchant Id

Authentication Key

Ask for Zipcode       Ask for PIN

---

     Production Machine

The top portion of this screen is to identify the CardConnect® Integration and enter the information about the processor. You will get this information from your CardConnect® vendor

1. Check the box to Enable CardConnect® Integration
2. Enter the Gateway URL.
3. Enter a user name
4. Enter a password
5. Enter the Bolt URL
6. Enter you Merchant ID
7. Enter the Authentication Key

You can add POS terminals to this screen.

1. Enter a name for the terminal
2. Enter the ID for the terminal
3. Select Ping to confirm the connection to the terminal.

You can add terminals or use the trash can to delete a terminal

## CardConnect® Manager

CardConnect® Manager allows you to see your credit card transactions.

Credit Card Manager									
customer:		Card type:	Amount:						
Please type at least t...		Generic	\$ 0.00	+ Add Deposit			← Refund		↻ Refresh
Transaction Date	Transaction Type	Card Holder Name	Transaction#	Amount	Status	Order#	Account Id	User	
18/07/2018 2:20 PM		B MAHAVEER	199664217022	\$ 0.30	Approval			admin	
18/07/2018 2:19 PM		B MAHAVEER	199748117261	\$ 0.30	Approval		1324	admin	
18/07/2018 2:17 PM		B MAHAVEER	199748117261	\$ 0.30	Approval	142094	1324	admin	
18/07/2018 2:15 PM				\$ 0.30	Command Cancelled	142094	1324	admin	
18/07/2018 2:14 PM				\$ 0.30	Command Cancelled	142094	1324	admin	
18/07/2018 2:14 PM				\$ 0.30	Command Cancelled	142094	1324	admin	
18/07/2018 2:13 PM		B MAHAVEER	199664217022	\$ 0.30	Approval	142094		admin	
18/07/2018 2:12 PM				\$ 0.30	Command Cancelled	142094		admin	
18/07/2018 12:40 P...		B MAHAVEER	199598111173	\$ 0.01	Approval		1324	admin	
18/07/2018 12:35 P...		B MAHAVEER	199598111173	\$ 0.01	Approval		1324	admin	

Using the boxes at the top you can make on account payment using CardConnect® Credit Card and then later adjust the payment against an invoice in Flex Post payment window.

Use the Refresh button to reload the page

## Refunding a credit card payment

The Refund button will be active based on user definition. Admin > User Definition will take you to where you define what permissions a user has and activate the ability to refund on credit cards.

<input type="checkbox"/>	Not allowed to override
<input checked="" type="checkbox"/>	Can override credit limit
<input type="checkbox"/>	Lock sales rep names
<input checked="" type="checkbox"/>	Can refund on credit cards

After selecting an entry in Credit card manager, the refund button will be usable. Selecting it will bring up the credit card details. Selecting continue will process the refund and you will get a message to adjust the credit card refund.

To complete the credit of 2.2, make sure you have entered a Journal Entry for the customer and that you apply the remainder as a 'credit card refund'



<b>Credit Card Details</b>	
Amount:	<input type="text" value="\$ 0.30"/>
Transaction Amount:	<input type="text" value="\$ 0.30"/>
Tax:	<input type="text" value="\$ 0.05"/>
Reference Number:	<input type="text" value="199748117261"/>
Invoice #:	<input type="text" value="142094"/>
<input type="button" value="Cancel"/> <input type="button" value="Continue"/>	





## From the Invoice Page

### Adding a deposit

You can add a deposit even if you do not save the invoice.

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

Selecting the Add Deposit function will allow you to receive the deposit from a credit card.

1. Select the card type

**Deposit Entry** ✕

---

▼ 1: Add New

Cash     
  Check     
  Credit Card

Card Type: Generic Card ⌵

Ref #: Generic Card

Amount: American Express(AMEX)

Discover(DISC)

Master Card(MCARD)

Visa(VISA)

Add Another

2. Enter the amount of the deposit
3. Select Process Credit

Deposit Entry

1: Add New

Cash     Check     Credit Card

Card Type: Visa(VISA)

Ref #:

Amount: 1,000.00

[+ Add Another](#)    [Confirm](#)

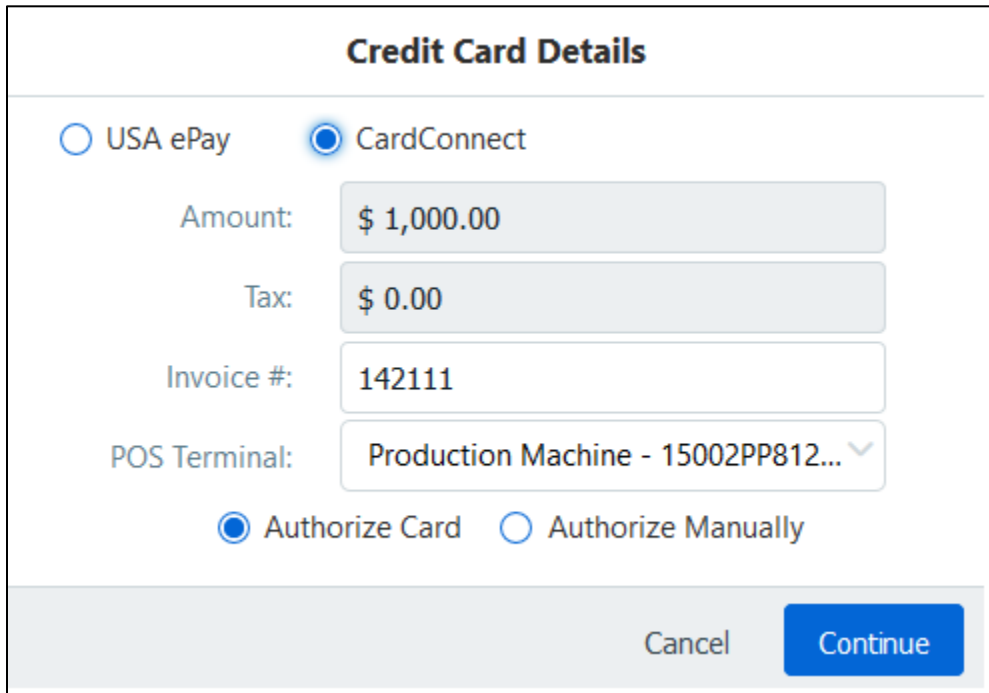
Note    The reference # is only filled in using a confirmation number you receive outside of PrintSmith.

Note    Exiting without confirming will cause the transaction to be voided.

Warning

Credit Card will not be processed! You should only enter an approval code in this field when the card has been COMPLETELY approved outside of PrintSmith. Click the manual approval button and enter all the card info for verbal authorization

OK



**Credit Card Details**

USA ePay  CardConnect

Amount: \$ 1,000.00

Tax: \$ 0.00

Invoice #: 142111

POS Terminal: Production Machine - 15002PP812... ▾

Authorize Card  Authorize Manually

Cancel Continue

With CardConnect® the amount, invoice number and POS Terminal will be shown. Use the POS Terminal dropdown if you need to change the terminal identification.

If you select Authorize Card then you will select Continue and scan the credit card. If it processes correctly you will get a message that the transaction has completed.

If you select Authorize Manually then you can manually enter the information about the credit card.



**Success** ✕

Approved (207374218513)

OK

The deposit will now be displayed.

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

Selecting the + after deposit will display the deposits and this is where you can also void a deposit transaction.

### Voiding a Deposit Transaction

You can also void the credit card payment. Select the + after deposit and you can now view the deposits, add a new deposit or void a deposit. Voiding a deposit will cause the transaction to be reversed and the deposit amount attached to the invoice will be removed.

**Deposit Entry** ✕

---

> 1 : Credit Card - (0809809809) \$ 1,000.00 Void

▼ 2: Add New

Cash     
  Check     
  Credit Card

Ref #

Amount

## From the Cash Register Page

### Receiving a payment

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

The screenshot shows the payment interface with the following elements:

- Payment Method:** Cash, Credit Card (selected), Charge, Check.
- Card Type:** Generic (dropdown).
- Ref #:** [Empty field with a red box around a card icon].
- Amount Receivable:** \$ 267.64.
- Buttons:** Receive Payment.
- Checkbox:** Apply Surcharge (checked).

Select the card type and then the icon to the right of the Ref #. This will launch the credit card detail screen.

**Note** Selecting the card type will also determine the surcharge that was set up for that card. For more information on setting up the credit cards and surcharges see page 6

The screenshot shows the 'Credit Card Details' screen with the following information:

- Selections:** USA ePay (unselected), CardConnect (selected).
- Amount:** \$ 272.99
- Tax:** \$ 24.33
- Invoice #:** 142043
- POS Terminal:** Production Machine - 15002PP812... (dropdown)
- Authorization:** Authorize Card (selected), Authorize Manually (unselected).
- Buttons:** Cancel, Continue.

The payment will be reflected in the transactions detail section.

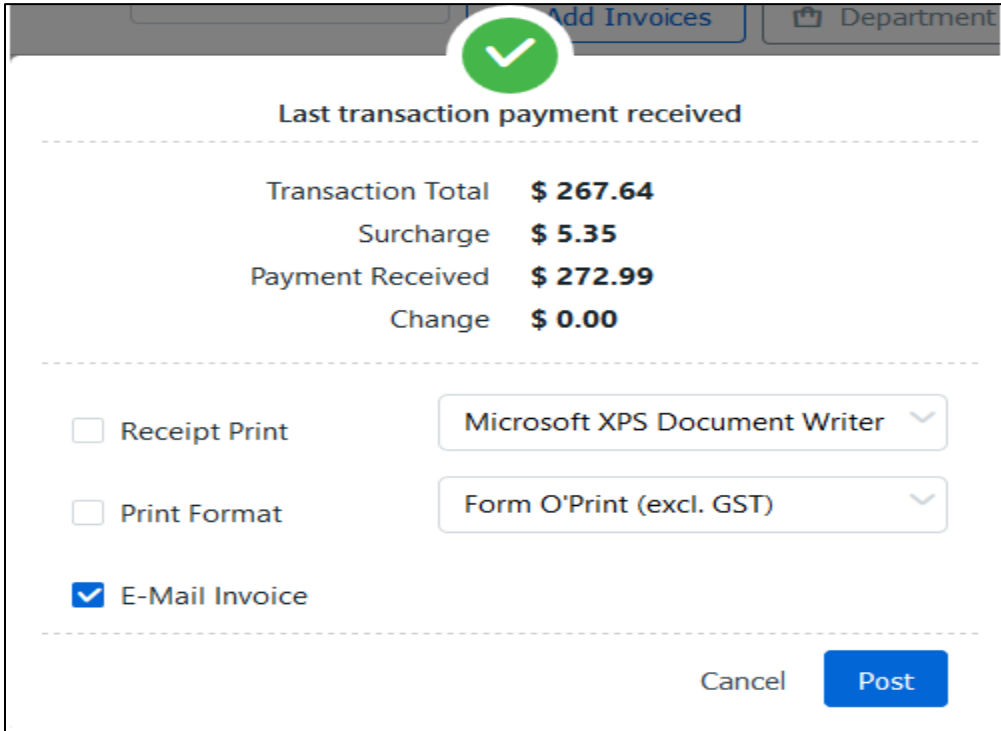
Account Type	Status
<b>Charge Account</b>	<b>Delinquent</b>
<b>Transaction Details</b>	
Sub-Total	\$ 252.73
Tax (GST)	\$ 25.27
<b>Total Cost</b>	<b>\$ 278.00</b>
<b>Payment History</b>	
Credit Card (Ref# 7373823828)	\$ 286.34 <input type="button" value="⊖"/>
Payment Received	\$ 286.34
Change	\$ 0.00
<b>Proceed</b>	

### Voiding a transaction

If you select the minus sign to the right of the payment history, it will be removed from invoice and the invoice will be unpaid.

Note You can only void the transaction before you Post it.

After receiving the payment, you will get the message that the payment was received and you can post the payment. You can also print a receipt, determine the format style and email an invoice from this screen.



**Last transaction payment received**

Transaction Total	<b>\$ 267.64</b>
Surcharge	<b>\$ 5.35</b>
Payment Received	<b>\$ 272.99</b>
Change	<b>\$ 0.00</b>

Receipt Print      Microsoft XPS Document Writer

Print Format      Form O'Print (excl. GST)

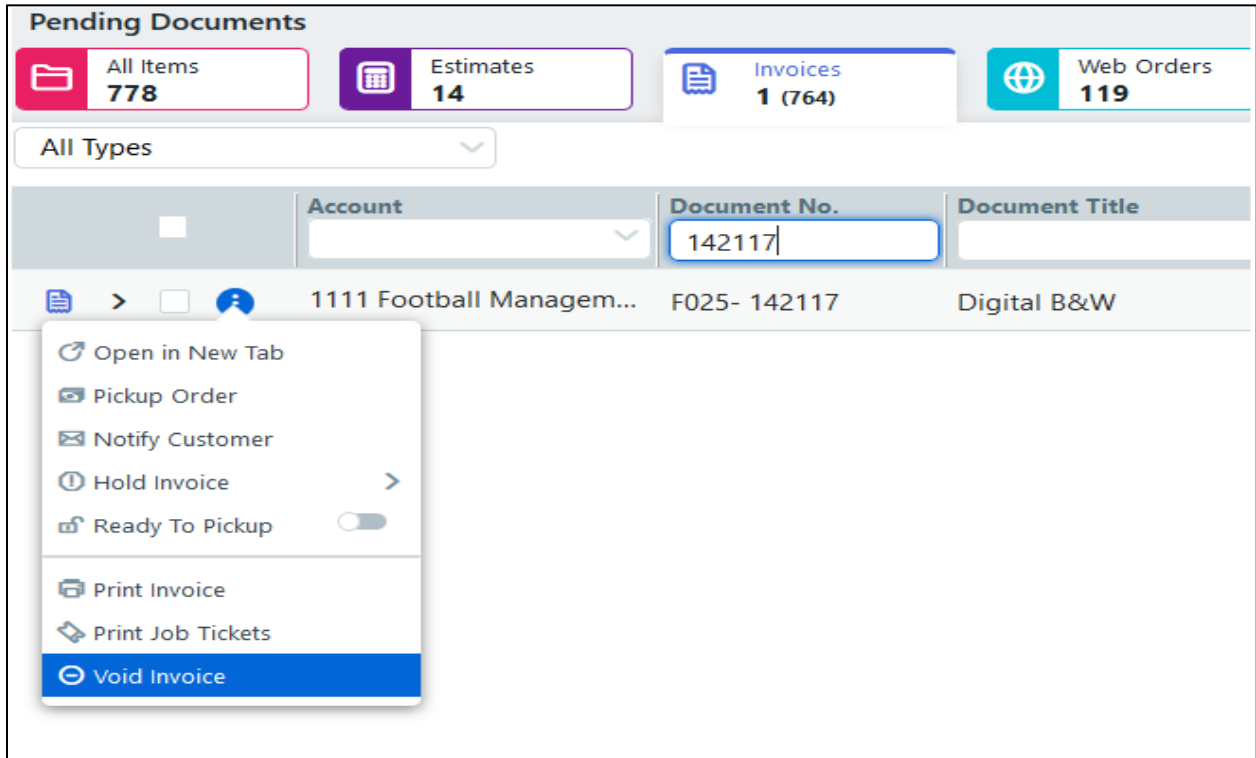
E-Mail Invoice

Cancel      **Post**

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 from Flex. Once the transaction is voided it would also get reflected on the credit card manager window in HTML

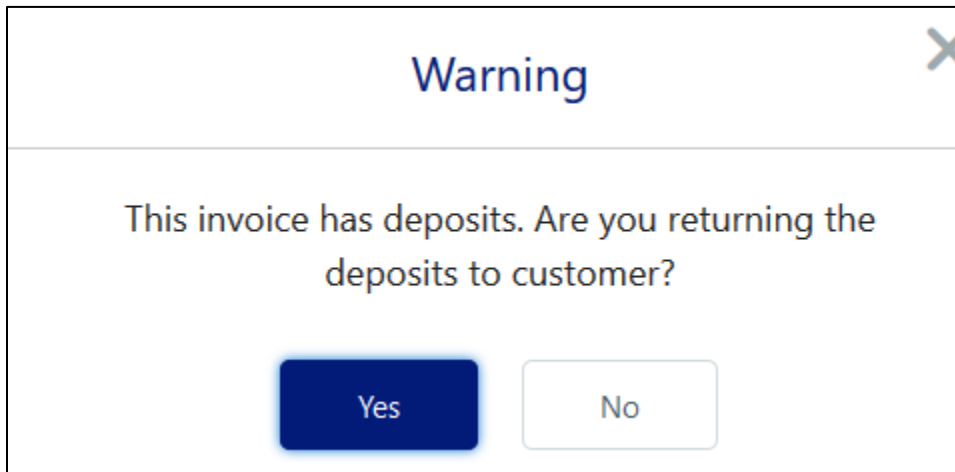
## Voiding an invoice in Pending Documents

In Pending Documents, you can void an invoice.



The screenshot shows the 'Pending Documents' interface. At the top, there are four summary cards: 'All Items 778', 'Estimates 14', 'Invoices 1 (764)', and 'Web Orders 119'. Below these is a search bar with 'All Types' selected. A table lists documents with columns for 'Account', 'Document No.', and 'Document Title'. One document is selected: '1111 Football Managem...' with 'Document No.' 'F025- 142117' and 'Document Title' 'Digital B&W'. A context menu is open over this document, listing actions: 'Open in New Tab', 'Pickup Order', 'Notify Customer', 'Hold Invoice', 'Ready To Pickup' (with a toggle switch), 'Print Invoice', 'Print Job Tickets', and 'Void Invoice' (highlighted in blue).

If the invoice has a deposit on it, you will be notified and asked if you want to refund the deposit.



The warning dialog box has a title 'Warning' and a close button (X) in the top right corner. The main text asks: 'This invoice has deposits. Are you returning the deposits to customer?'. At the bottom, there are two buttons: 'Yes' (a dark blue button) and 'No' (a light grey button).

If you select Yes, then the amount should be returned and in credit card manager the amount will be voided. If user says No, then the deposit will be FORFEITURE