



# RFMS Credit Card Services

Powered by CardConnect (RFMS Core)

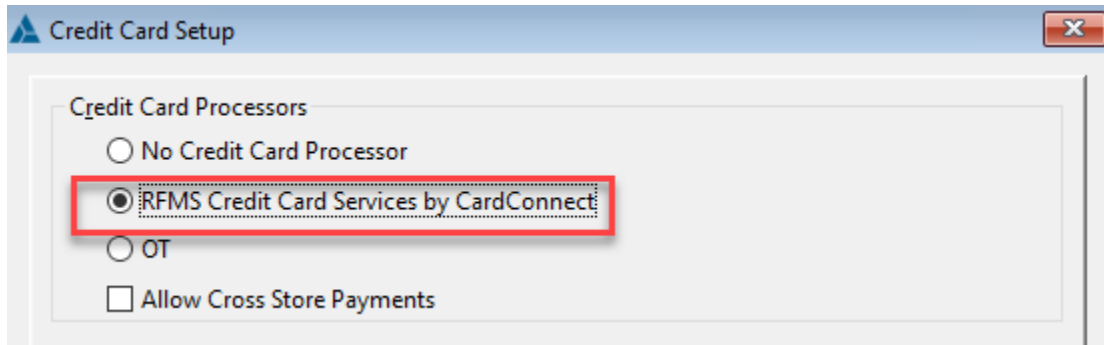
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## Setup

A trainer will assist setting the service, merchant id's for use with Card Connect.

To see if your company is set up go to Order Entry>Utilities> Credit Card Setup>Credit Card Setup



Credit Card Setup

Credit Card Processors

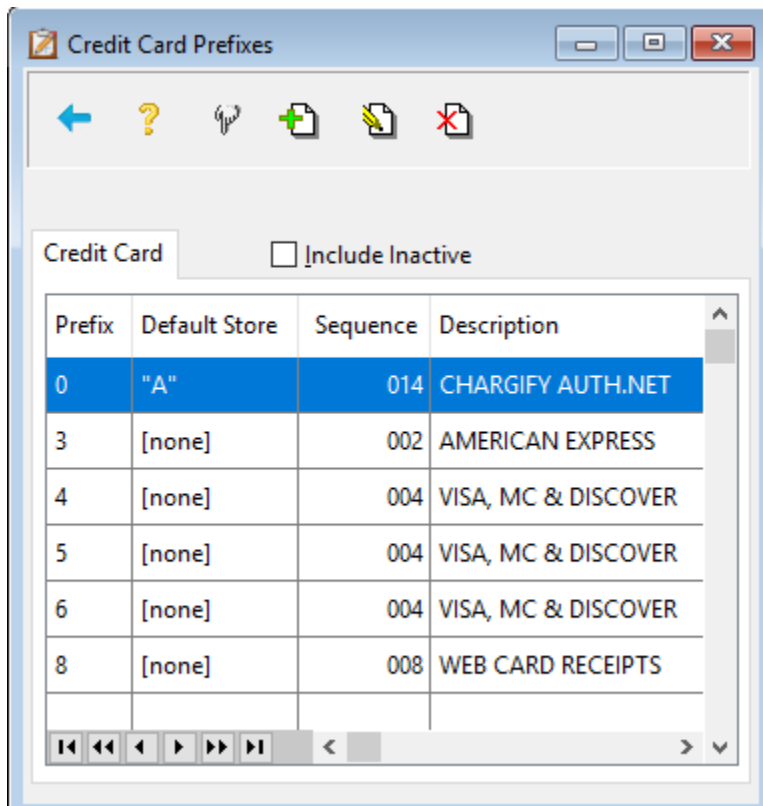
No Credit Card Processor

RFMS Credit Card Services by CardConnect

OT

Allow Cross Store Payments

Also confirm Credit Card Prefixes are configured. Order Entry>Utilities> Credit Card Setup>Credit Card Prefixes



Credit Card Prefixes

← ? ? + ✎ ✖

Credit Card  Include Inactive

Prefix	Default Store	Sequence	Description
0	"A"	014	CHARGIFY AUTH.NET
3	[none]	002	AMERICAN EXPRESS
4	[none]	004	VISA, MC & DISCOVER
5	[none]	004	VISA, MC & DISCOVER
6	[none]	004	VISA, MC & DISCOVER
8	[none]	008	WEB CARD RECEIPTS

Navigation icons: Home, Back, Forward, Stop, Refresh, Print, Close

# Posting Payments

## Card Present

Post payments like usual using the payment icon in Order Entry.

Customer Payment dialog box showing fields for Customer, Invoice, Store, Due, Payment, Balance, Payment Date, Reference, Register, and checkboxes for Card Not Present and Customer consented to save credit card information. The Card payment method is selected and highlighted with a red box. The OK button is also highlighted with a red box.

Skip the receipt register.

### Checkbox options

(See details later in document)

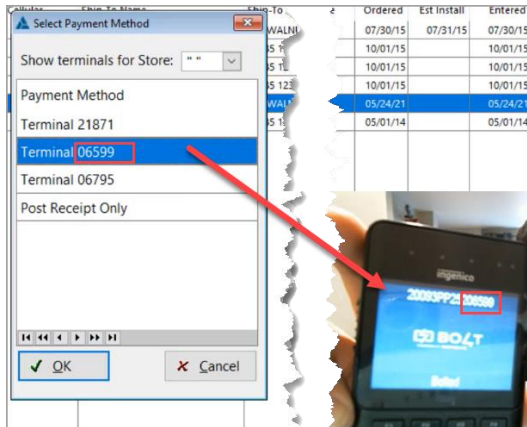
- “Card not Present” – this will launch manual card entry on a terminal.
- Customer consented to save credit card information= Information is saved to be used on future transactions

Enter amount in the credit card box and select ok

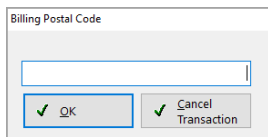
A box will pop up with a terminal or choice of terminals to select.

Select Payment Method dialog box showing a list of terminals (Terminal 21871, Terminal 24264, Terminal 06893) and the OK button highlighted with a red box.

The last four digits of the terminal are shown on the select screen.

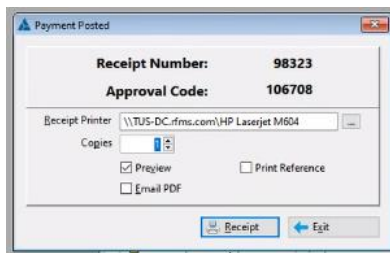


Next enter the Billing Postal Code. This can be skipped by leaving the information blank and selecting ok.

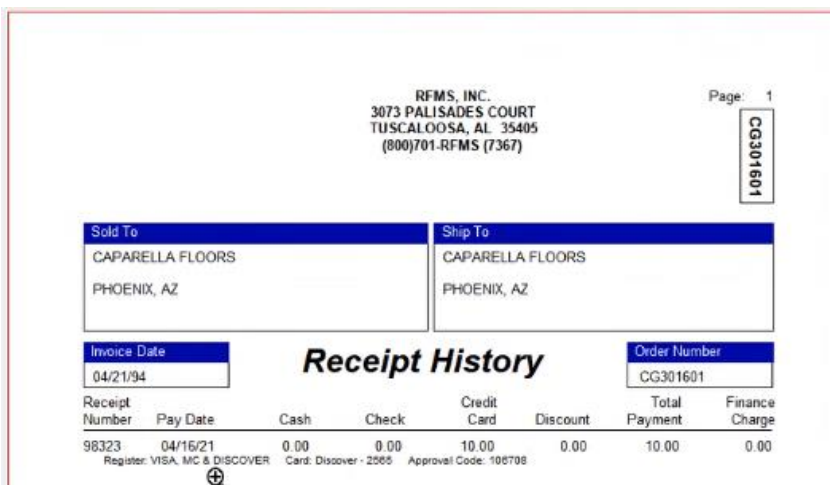


Next Scan or tap the card using terminal or To cancel now, press Red X twice on the terminal.

Payment is then posted and receipt info is displayed including the approval code.



Printed receipt has payment details.



## Card not Present

A customer may give their credit card information over the phone.

**Customer Payment**

Customer: CUSTOMER, CREDIT CARD  
Invoice: CG130069  
Store: "1" - RFMS, INC.

Due: 450.00  
Payment: 1.00  
Balance: 449.00

Payment Date: 06/30/21 F8  
Reference:   
Register: - Please select a receipt register -  
 Card Not Present  
 Customer consented to save credit card information

**Enter Card Info On Terminal**

Check: 0.00 E D Total Paid: \$1.00  
Cash: 0.00 E D  
Card: 1.00 E D Tended: 1.00  
Discount: 0.00 E D Change Due: 0.00

Discount Account: 405 F8 00 F8  
CUSTOMER DISCOUNT & REFUND

Comments:   
Clear OK Cancel

Process as before except select the

### Checkbox options

- "Card not Present" – this will launch manual card entry on a terminal.

Follow instructions on Terminal to type in card number and complete on terminal.

## Saving Credit Card Information for Future Transactions

A customer may authorize a down payment now and full payment using the same card in the future.

The screenshot shows the 'Customer Payment' window with the following details:

- Customer: CUSTOMER, CREDIT CARD
- Invoice: CG130069
- Store: "1" - RFMS, INC.
- Due: 450.00
- Payment: 1.00
- Balance: 449.00
- Payment Date: 06/30/21
- Reference: [Empty]
- Register: - Please select a receipt register -
- Card Not Present
- Customer consented to save credit card information
- Check: 0.00
- Cash: 0.00
- Card: 1.00
- Discount: 0.00
- Total Paid: \$1.00
- Entered: 1.00
- Change Due: 0.00
- Discount Account: 405 F8 00 F8
- Comments: [Empty]

The 'Select Payment Method' dialog is open, showing a list of terminals. 'Terminal 49971' is highlighted with a red box.

### Checkbox options

- Customer consented to save credit card information= Information is saved to be used on future transactions

The actual credit card number is never saved, instead a token is saved. This token is only valid to be used by the merchant id associated with the initial transaction. The information cannot be stolen and used by another party.

### Posting Token Payments

After initial payment has been made, when user goes to make a payment the option to select a token from the previously used card is an option.

The screenshot shows the 'Customer Payment' window with the following details:

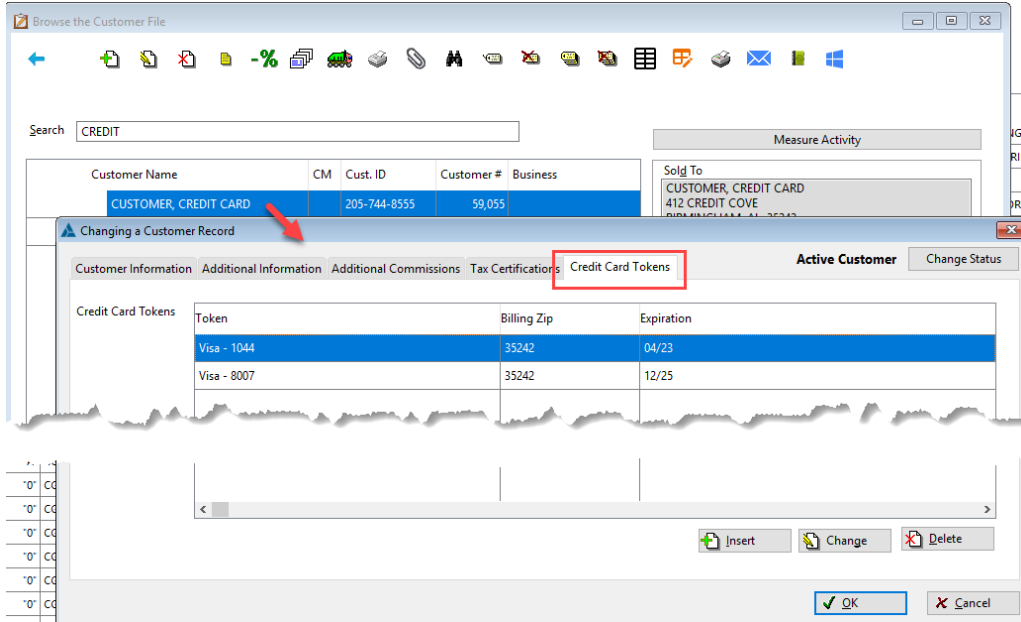
- Customer: CUSTOMER, CREDIT CARD
- Invoice: CG130069
- Store: "1" - RFMS, INC.
- Due: 450.00
- Payment: 1.00
- Balance: 449.00
- Payment Date: 06/30/21
- Reference: [Empty]
- Register: - Please select a receipt register -
- Card Not Present
- Customer consented to save credit card information
- Check: 0.00
- Cash: 0.00
- Card: 1.00
- Discount: 0.00
- Total Paid: \$1.00
- Entered: 1.00
- Change Due: 0.00
- Discount Account: 405 F8 00 F8
- Comments: [Empty]

The 'Select Payment Method' dialog is open, showing a list of terminals. 'Visa - 1044 04/23' is highlighted with a red box.

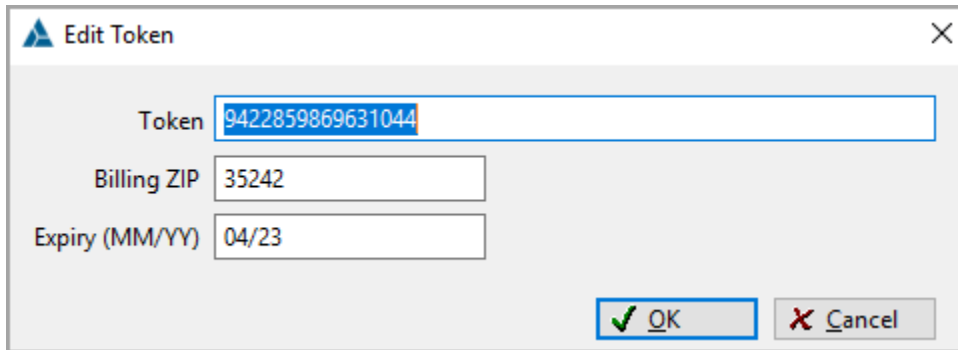
## Saved Information

The token information is saved on the customer record.

Edit the customer record and go to the Credit Card Token Tab to access the saved credit card information.



A token may need to be edited to change the billing zip code or expiration date.



While most tokens will be added during a transaction on an invoice, token information can be found on the Card Pointe Service.

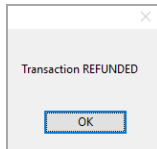
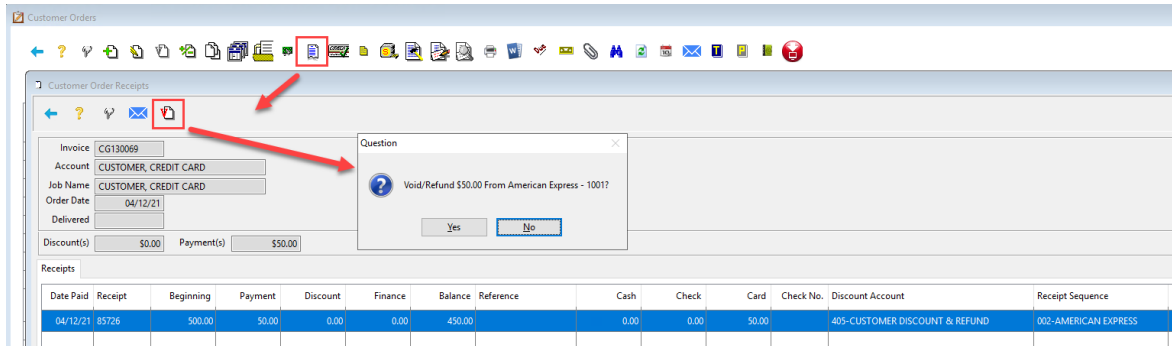
## Voiding or Refunding Payments

### Full Refund

Select the receipt history on the order to be processed.

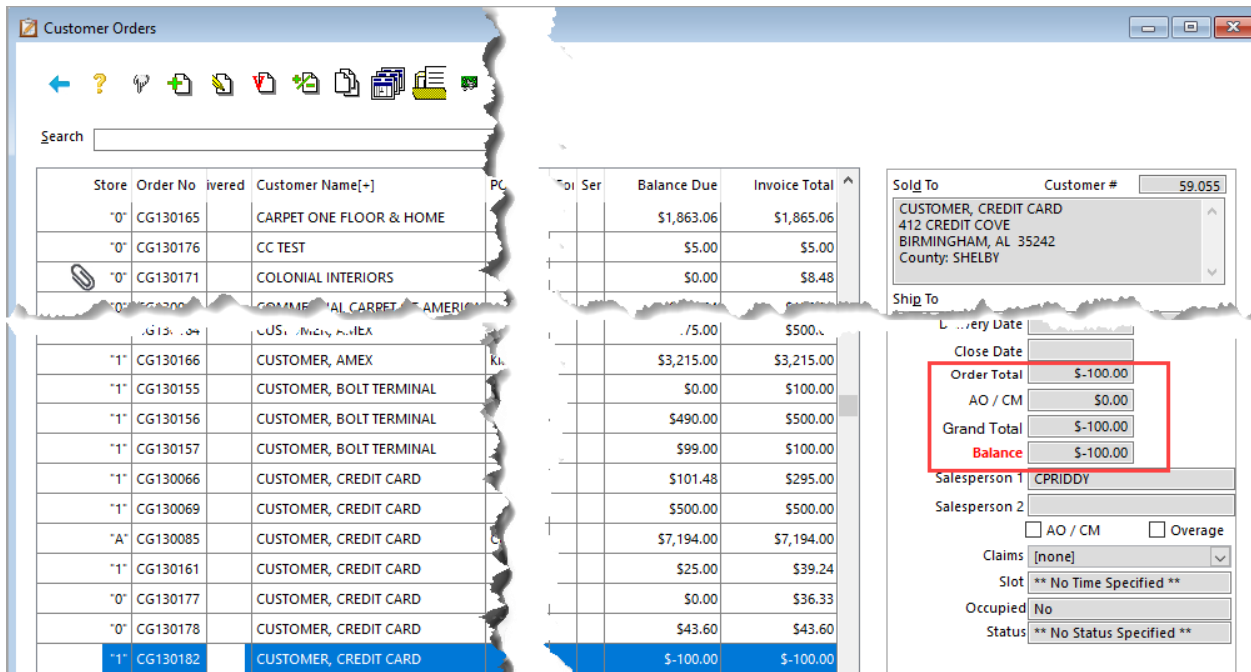
The option to void or refund depends on whether the payment has been processed via CardConnect yet.

If it has not the transaction will be voided.

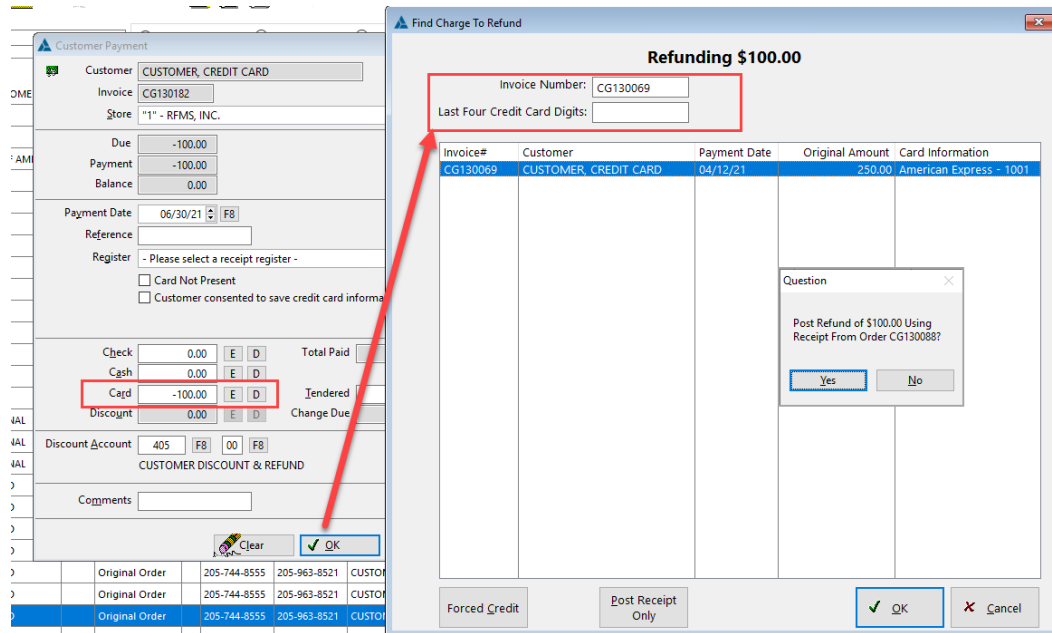


### Partial Refund

To give a partial refund, create a new invoice for the material being returned or amount being refunded. It will have a negative balance due.



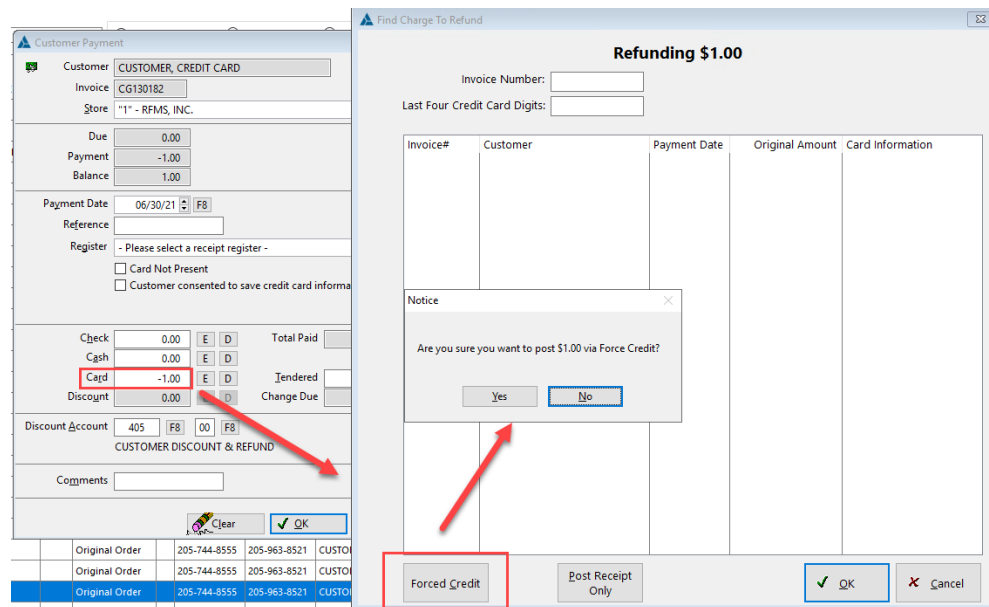
When posting the payment make sure the amount paid is negative. This will pop up the refund screen. Enter either the original invoice number or the last four digits of the credit card number.



The refund is processed, and a receipt is created. A refund may not be processed for more than the amount received on a card.

### Forced Credit

This option is for payments which were processed before using **RFMS Credit Card Services with CardConnect**. Create the negative invoice and post a negative amount in card payment field.



The remaining steps are just like posting a payment from a new card.

## Posting Virtual Terminal Payments

For payments made in Card Pointe's Virtual Terminal and not in RFMS or an App, payments can be manually posted to order by selecting "Post Receipt Only" which will not process any card transaction assuming the processing has been done already.

The screenshot displays the 'Customer Payment' window with the following details:

- Customer:** CAPARELLA FLOORS
- Invoice:** CG301601
- Store:** \*1 - RFMS, INC.
- Due:** -10.00
- Payment:** -10.00
- Balance:** 0.00
- Payment Date:** 04/16/21
- Register:** 004 - VISA, MC & DISCOVER
- Total Paid:** \$-10.00
- Card:** -10.00
- Discount:** 0.00
- Discount Account:** 405
- Comments:**

The 'Select Payment Method' dialog box is open, showing a list of payment methods:

Type	Payment Method
Original Order	Terminal 21871
Original Order	Terminal 06795
Original Order	Terminal 07451
Original Order	Terminal 31107
Original Order	Terminal 29711
Original Order	Terminal 88387
Original Order	Discover - 2565 11/25
Original Order	Post Receipt Only

The 'Post Receipt Only' option is highlighted in blue. The dialog box also includes 'OK' and 'Cancel' buttons at the bottom.