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CREDIT CARD PROCESSING – SETUP, STORING BY TOKENIZATION, CHARGING AND REFUNDING

Setup for Credit Card processing is done in the Territories screen in Setup Franchise > Territories. This is to allow separate processing accounts to be used per territory.

Mr Appliance Training

Franchise

Options Save Discard

Name: Mr Appliance Training

Franchisee Name:

Franchise Consultant:

Primary Territory: MRA Training Territory

Return Location: Returns

Country: United States

Internal:

Terminated:

Active:

ID:2 Created:2016-10-09 Updated:2020-06-10

- Accounting Class Codes
- Address
- Attachments
- Bank / CC Accounts
- Tasks Category
- Calendars
- Communication
- Contact Topic
- Contract
- Disclaimers
- Dispatch Codes
- Employees
- Employee Goals
- Location
- Manufacturers
- Notes
- Options
- Phone Lead Source
- Phone System Setup
- Postal Codes
- Part Margin Tool
- Secondary Lead Source
- Service Types
- SmartWare Billing Summary
- SMS Setup
- Specialty Scale
- Tax Authority
- Territories**
- Zones

Territories

Save Discard

Name: MRA Training Territory

Address: Office - 1010 N. University Parks Dr

Office Inventory Location: Staging - 1010 N. University Parks Dr

Phone Number: Cell Phone - 5425233232

Email Address:

Territory Time Zone: (UTC-06:00) Central Time (US & Canada)

Accounting Class Code:

Company Code: QBO

QuickBooks Company Name:

Payment Gateway: Authorize.net

Payment Account Number: rbaker

Payment Account Password: Show Password

Marcone Username: 140873

Marcone Password: Show Password

Shipping Method: UPS Ground

Net Promoter Score:

Pivotal License Number: www

Business License Number:

Credit Card Processor: eProcessing Network

ePN Account:

Restrict Key: Show Password

Processor API URL: https://www.eprocessingnetwork.com/cgi-bin/epn/secure/tbde/transact.pl

EPN SETUP

1. Go to Setup Franchise > Territories.
2. Edit Territory

Setup Franchise (1) ▾

Franchise

Options ▾ Save Discard

Name: Mr Appliance

Franchisee Name: [Redacted]

Franchise Consultant: Noe, Michael

Primary Territory: Mr Appliance

Return Location: RETURN - M

Country: United States

Internal:

Terminated:

Active:

ID:11 Created:2016-10-26 Updated:2020-07-29

- Accounting Class Codes
- Address
- Attachments
- Bank / CC Accounts
- Tasks Category
- Calendars
- Communication
- Contact Topic
- Contract
- Disclaimers
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Territories

+ Territory

Mr Appliance of [Redacted]
Mr Appliance of [Redacted]

Search

1

2

3. Select eProcessing Network as Credit Card Processor.
4. Enter your ePN account number.
5. Enter your Restrict Key.
6. Set Processor Code to 0.

*** Once the first card is tokenized or refund is processed, the Processor Code will change to 1 and the Restrict Key will be tokenized, appearing to be a different Restrict Key than what was entered.***

7. Technicians must do an office sync on the mobile app to connect to the CC processing information.

	Pivotal License Number:	MR, 00
	Business License Number:	
3	Credit Card Processor:	eProcessing Network
4	ePN Account:	10 21
5	Restrict Key:	YyPn Myc5S Hide Password
	Processor API URL:	https://www.eprocessingnetwork.com/cgi-bin/ePN/secure/tdbe/tran
6	Processor Code:	0
	Default Price Book:	Basic

AUTHORIZE.NET SETUP

1. Go to Setup Franchise > Territories.
2. Edit Territory

Setup Franchise (1) ▾

Franchise

Options ▾ Save Discard

Name: Mr Appliance

Franchisee Name: [Redacted]

Franchise Consultant: Noe, Michael

Primary Territory: Mr Appliance

Return Location: RETURN - M

Country: United States

Internal:

Terminated:

Active:

ID:11 Created:2016-10-26 Updated:2020-07-29

- Accounting Class Codes
- Address
- Attachments
- Bank / CC Accounts
- Tasks Category
- Calendars
- Communication
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- Tax Authority
- Territories
- Zones

Territories

+ Territory

Mr Appliance of [Redacted]

Mr Appliance of [Redacted]

Search

1

2

MOBILE APP PROCESSING

1. Select Authorize.net as Credit Card Processor
2. Enter Account Number used to log into the Authorize.net website.
3. Enter Password used to log into the Authorize.net website.

a. Authorize.net requires this password to be changed every 60 days. When the password is changed on the website, it must also be changed here. Techs need to do an Office Sync on the iPad to get the new password.

1	Credit Card Processor:	<input type="text" value="Authorize.Net"/>
2	Auth.Net Account:	<input type="text" value="mra [redacted] il.com"/>
3	Auth.Net Password:	<input type="password" value="....."/> <input type="button" value="Show Password"/> 
	Auth.Net API Login ID:	<input type="text" value="42 [redacted] Gjg"/>
	Auth.Net Public Client Key:	<input type="text" value="8wPrt5 [redacted] tV7FyN33jCP55Qqga8Zul"/>
	Auth.Net API Transaction Key:	<input type="text" value="7AjK8 [redacted] 9f38"/>
	Auth.Net Live or Test:	<input type="text" value="Live"/>

4. Technicians must do an office sync on the mobile app to connect to the CC processing information.

5. The ***first time*** credit card processing is attempted on the mobile app, a message will come up saying “Initializing...” then “Logging in...” then “Please enable the device in the Authorize.Net merchant interface website.”
6. Log into the Authorize.net website once the “Please enable” message is received on the iPad.
7. Go to Account > Settings > Mobile Device Management.
8. The device will be listed as “Pending”. Select the radio button labeled “Enable the Device.”
9. On the mobile app, use the “Back” button from the credit card screen to go back to the payment type selection screen.
10. Select “Credit Card” again. There will be a message saying “Credit processing enabled.”
11. The mobile app will now be able to process credit card payments.

SW DESKTOP PROCESSING

In addition to the Processor, Auth.net Account and Auth.net Password that are required for CC processing on the mobile app, the following fields must be filled out in order to use the tokenizing and charging functionality in SW desktop.

1. Enter Authorize.net API Login.
 - a. In your Auth.net dashboard: Account > Settings > Security Settings > General Security Settings > API Credentials and Keys
2. Enter Authorize.net Public Client Key
 - a. In your Auth.net dashboard: Account > Settings > Security Settings > General Security Settings > Manage Public Client Key
3. Enter Authorize.net API Transaction Key
 - a. In your Auth.net dashboard: Account > Settings > Security Settings > General Security Settings > API Credentials and Keys. Transaction Key is generated and shown only at time of Api Login ID creation.
4. Under Auth.Net Live or Test, Select Live

	Credit Card Processor:		Authorize.Net	▼
	Auth.Net Account:		mra	il.com
	Auth.Net Password:		Show Password 
1	Auth.Net API Login ID:		42	Gjg
2	Auth.Net Public Client Key:		8wPrt5	tV7FyN33jCP55Qqga8Zu
3	Auth.Net API Transaction Key:		7AjK8	9f38
4	Auth.Net Live or Test:		Live	▼

STORE AND TOKENIZE CREDIT CARD IN CUSTOMER RECORD

1. Open the customer record.
2. Click on the down arrow in the Billing Panel.

Customer Search

Customer 🏠 🗑️ ⌵

ID	Customer	Significant Other	Estimators	Lead Source	Status
C25104	Nancy	N/A	N/A	N/A	Active

Special Info

ID:3342736 Created: Updated:

Billing ⌵

Current Balance	Responsible Party	Preferred Billing Method	Cumulative Jobs	Cumulative Fees	Credit Cards on File
\$0.00	Self		1	\$446.12	

Jobs

+	Code	Job Date	Ticket #	Address	Tech	Status	Total Due	Balance	Type
✎ 📄	COD	Jul 27, 2020	5009142	Drive	C	Tech Completed	\$446.12	\$0.00	Customer

1 - 1 displayed , 1 in total

3. Click on the + button to add credit card information.

Billing 🏠 🗑️ ⬆️

Billing Type: ⌵

Credit Term: ⌵

Cumulative Jobs:

Cumulative Fees: \$

Current Balance: \$

Preferred Payment Method:

Responsible Party: ⌵

Tax Exempt:

Exclude Credit Card Convenience Fee:

Credit Card: ⌵ ✎ +

4. Enter Credit Card info. Be sure the expiration date is correct.
5. Click on Save and Tokenize.

Credit Card ▼ ✎ +

Address
Home Address - 02360 ▼

Type
VISA ▼

Number
6650

Token

First Name
Rebecca

Last Name

Exp:
02/2022

CVV2:

Active:

4

5 Save and Tokenize Clear Cancel

6. You will receive a message in the lower left-hand corner of the screen stating that the tokenization was successful.
7. The stored and tokenized credit card now shows in Credit Card drop-down on the customer record.

Billing Pend 🏠 🗑️ ⬆️

Billing Type: Self ▼ **Preferred Payment Method:** ▼

Credit Term: Due On Receipt ▼ **Responsible Party:** Self ▼

Cumulative Jobs: 1 **Tax Exempt:**

Cumulative Fees: \$ 446.12 **Exclude Credit Card Convenience Fee:**

Current Balance: \$ 0.00

Credit Card: 7 VISA-6650 ▼ ✎ +

CHARGE A PAYMENT TO A STORED AND TOKENIZED CREDIT CARD

1. Open the work order that needs the credit card payment.
2. Click on Options > Payments.
3. Click on the + button to add a payment.

Work Order 1 Options Print/Email Save Discard

Name: [Redacted]
Address: 02360 - Home
Address Note: [Redacted]
Third Party Billing:
Work Authorization: [Redacted]
Work PO Number: [Redacted]
Phone: (774) [Redacted]
Email Address: [Redacted]
Job Status: [Redacted]

Attachments
 Communication Notes
 Contacts
 Copy
 Cores & Returns
 Create Call Back Work Order
 Customer
 Inventory Transfer
 Job History - Bill To
 Job History - Customer
 Notes
 Notifications
 Payments
 Purchase Orders
 Split Pay

5009142
 7 ▼
 New Work Order Menu ▼
 07/27/2020 📅
 03:15 pm - 04:15 pm
 PM ▼
 [Redacted]
 [Redacted]
 Davis, George ▼
 Davis, George ✕

Work Order Payments

	Payor Name	Payment Type	Payment Number	Pat An
✎	[Redacted]	[Redacted]	[Redacted]	[Redacted]

Search

3 +

4. Under Payment Action, select Charge Credit Card.

The screenshot shows a web form titled "Work Order Payments" with a red header bar. In the top right of the header, there are two buttons: "Save" (with a floppy disk icon) and "Discard" (with a trash can icon). The form fields are as follows:

- Payment Action:** A dropdown menu is open, showing three options: "Enter Payment" (top), "Enter Payment" (middle, highlighted in blue), and "Charge Credit Card" (bottom). A yellow callout bubble with the number "4" points to the "Charge Credit Card" option. A mouse cursor is visible over the top-right corner of the dropdown menu.
- Payor Name:** A text input field containing "Enter Payment".
- Amount:** A text input field containing "Charge Credit Card".
- Payment Date:** A date picker field showing "07/29/2020" with a calendar icon to its right.
- Posted Date:** A disabled grey text input field.
- Payment Type:** A dropdown menu with a downward arrow on the right side.
- Memo:** A large empty text area.
- Active:** A checked checkbox.

5. Enter Payor Name and Amount.

6. Select the Credit Card to use for payment.

7. Click on "Charge".

Work Order Payments

7 Charge Discard

Payment Action: Charge Credit Card

Payor Name: Rebecca Baker

Amount: \$ 0.10

Credit Card: VISA-6650

Auth #:

Memo:

8. The payment is processed, and authorization number is updated automatically.

Work Order Payments

Save Refund Discard

Payor Name:

Amount: \$ 0.10

Payment Date: 07/29/2020

Posted Date:

Payment Type: VISA

Card Number (last 4): 6650

Authorization: 6247920

Card Expiration: 01/31/2022

Memo: Auth: 6247920 ?

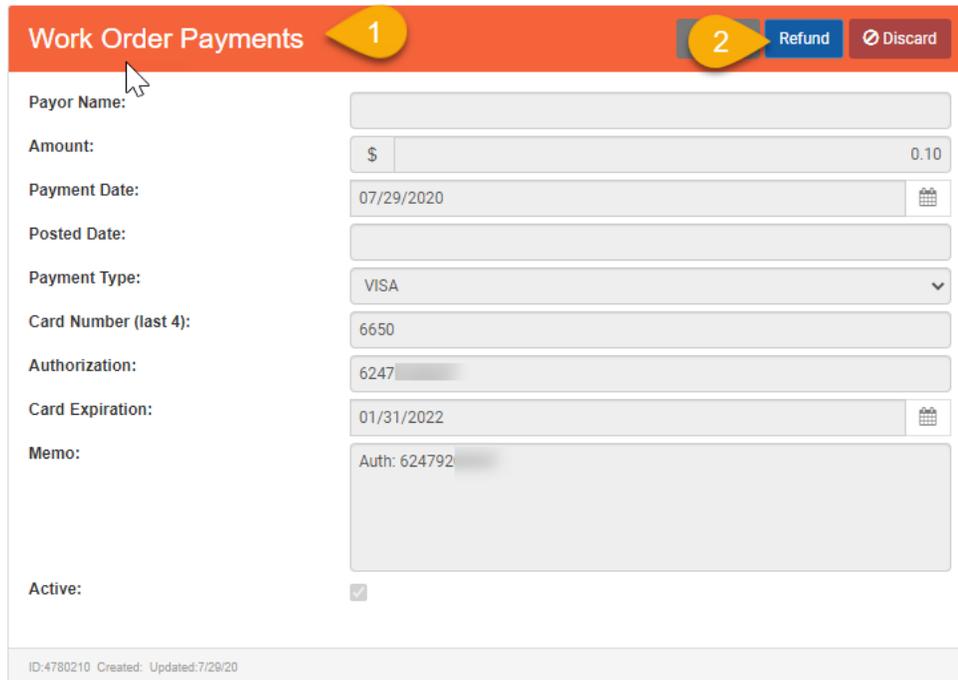
Active:

MAKE A REFUND TO A CREDIT CARD PAYMENT

Refunds entered using the following steps will be automatically processed in your payment gateway (Authorize.net or ePN).

If you have already processed the refund in the gateway, following these steps will issue a second refund for that amount to the customer's credit card. If you have already processed the refund in the gateway, enter the refund manually by clicking the + button on the payment screen, selecting payment type of refund and entering the amount as a negative number.

1. Open the payment to be refunded.
2. Click on the Refund button. Users must have the role of "Refunds" in their Access Controls on the Employee Record for the Refund button to be active.



The screenshot shows the 'Work Order Payments' interface. At the top, there is a red header bar with the text 'Work Order Payments' and a yellow callout bubble with the number '1' pointing to the header. To the right of the header, there is a blue 'Refund' button and a red 'Discard' button, with a yellow callout bubble containing the number '2' pointing to the 'Refund' button. Below the header, the form contains the following fields:

- Payor Name: [Text input field]
- Amount: \$ [Text input field] 0.10
- Payment Date: 07/29/2020 [Date picker]
- Posted Date: [Text input field]
- Payment Type: VISA [Dropdown menu]
- Card Number (last 4): 6650 [Text input field]
- Authorization: 6247 [Text input field]
- Card Expiration: 01/31/2022 [Date picker]
- Memo: Auth: 624792 [Text area]
- Active:

At the bottom left of the form, there is a footer: ID:4780210 Created: Updated:7/29/20

3. Enter the Refund amount.

4. Click on Save.

Work Order Payments

4

Refund Amount: \$ **3**

Payor Name:

Amount: \$

Payment Date:

Posted Date:

Payment Type:

Card Number (last 4):

Authorization:

Card Expiration:

Memo:

Active:

ID:4780210 Created: Updated:7/29/20