STEP1 SOFTWARE SOLUTIONS
ONE STEP AHEAD

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STEP1 Credit Card Interface – Frequently Asked Questions

Q: How do I set up a credit card on file?

A: On a workstation with the CIP (ChargeItPro) gateway installed go to A/R, highlight the customer and click Setup/Modify Customer Secure Credit Card Info. Type in the credit card information, the billing street address and zip code, click Add. The credit card will be validated and saved in STEP1 and CIP with only the type of CC (VS, MC or AX) and the last four digits of the CC number shown. You can also setup a credit card on file from within Enter Customer Payments. Change the Payment Method to Credit Card, in the middle of the screen the Setup/Modify Customer Secure Credit Card Info tab will appear. Type in the credit card information and click Add. You can also setup a credit card on file in the CC PrePay/AutoPay tab in A/R.

Q: How do I modify a credit card on file?

A: In A/R, highlight the customer and click Setup/Modify Customer Secure Credit Card Info. In this tab you can delete a card on file, set up a new card on file, or change the Default CC for this customer (if the customer has more than one CC on file). Information that can be modified is the Exp Date, and the Name on the credit card. If you need to change the credit card number, or the CVV you will have to Add a new card, then delete the old card.

Q: Can I use a Debit card for payments?

A: Yes. But you have to use the credit option, since the debit option requires a PIN pad.

Q: How do I print or email a credit card receipt?

A: After you have set up a credit card on file for a customer, go to A/R, Modify Customer Info. On the Main screen, select the person who will be the Credit Card Contact from the drop down menu. If this person is not shown in the drop down list, go to the Contacts tab and set up this person as a contact. If you will be emailing receipts to this person, make sure you enter their email address in the contacts. Now, go to the Credit Info tab, you will see the Primary Payment Method for this customer is now Credit Card. Modify Send CC Payment Receipt to N for no payment receipt, E for Email, or P for Print.

Q: How do I enter a customer payment using a credit card?

A: If you have already setup a credit card on file for this customer in A/R, click Enter Customer Payment, or Enter Group Payment. The Payment Method will default to Credit Card. Enter the payment amount and pay the invoices for this payment. Click Save, to save the payment. You will be asked if you want to process this credit card payment now, click Yes and the CIP gateway will open. The credit card on file for this customer will come up (if you have more than one card on file for this customer pick the card from the drop down menu), click Process and the credit card will be charged. An Approved, or Declined result will show on the screen. A charge receipt will be emailed or printed based on the default setup for this customer.

Q: The customer doesn't want to use their credit card on file. They want to use a different credit card for a one time transaction.

A: In A/R, highlight the customer and click Enter Customer Payment, or Enter Group Payment. The Payment Method will show Credit Card. Enter the payment amount and pay the invoices for this payment then Save the payment. You will be asked if you want to process this credit card payment now, Click Yes and the CIP gateway will open. The primary credit card on file for this customer will come up on the screen. Click the One Time Trans tab on the right. Enter the credit card information, click Process and the credit card will be charged. An Approved, or Declined result will show on the screen. The credit card information you entered will not be saved.

Q: Can I use a credit card to pay invoices for a Payment Group?

A: Yes. You can run a one-time payment, or you can setup a credit card on file on the Master Account for a Payment Group.

Q: I used the wrong credit card on file when entering the customer payment how do I correct the payment?

A: If the customer payment isn't posted, in A/R, go to the Unposted Payments tab, highlight the payment and click Void Unposted Customer Payment. This will void the customer payment in STEP1 and the charge to CIP. Reenter the payment using the correct credit card. If the customer payment has been posted and you need to back it out see the attached sheet for instructions.

Q: I was entering a customer payment with a credit card on file, I saved the payment and the CIP gateway came up, but it froze, I didn't receive an Approved or Declined message?

Give it a couple of minutes to finish the transaction, if it doesn't finish you will need to clear this session of A/R. Hold down the Ctrl and the Alt key, then click the Del key. Click on Task Manager, highlight your session of A/R and click End Task. This will close your A/R session. Open another A/R session and enter the payment again. You may want to go to your CIP Merchant account and double check to make sure that the credit card did not charge. If it did, void the charge on CIP so that you can redo the payment properly in STEP1.

Q: The customer returned items for credit, and they paid the invoice with their credit card on file, how do I return the amount paid to their credit card?

A: Enter a credit memo for the return of the items, invoice and post the credit memo. In A/R find the customer and click Enter Customer Payment. Make sure the payment method shows Credit Card. Type in the dollar amount as a negative number. Highlight and pay the credit memo in full. Save the payment and you will be asked if you want to process the credit card now, click Yes. The CIP gateway will open, and the customer's credit card information will appear, it will say Credit Sale, click Process. If the credit payment needs to be credited to a different credit card, you will need to ask the customer for the credit card information and enter the payment using the One Time Trans payment tab.

Q: Customer purchased items using Point of Sale check out in O/D with a credit card, and returned them the same day. Can I void the sale and return the dollars to the customer's credit card?

Since they are returning the items the same day, the order hasn't been posted in STEP1, or batched through CIP. In Customer Billing, Unposted tab, find that order and click DeSelect Invoice. Now go to OrderDesk, Pending Orders tab, highlight the order and click Void Order. This will void the sale in STEP1 and void the charge on CIP. **NOTE:** If the sale was run through on a workstation with an EMV swiper, the void needs to be processed on the same workstation in order to void properly. If you do the void on a different workstation, the void will go through in STEP1, but will not void in CIP. **ALSO:** Once an EMV order has been batched at CIP, it can't be voided through CIP.

Q: I forgot to print/email a credit card receipt, how do I print/email another one?

A: Login to your CIP Merchant account. View the batch that included that payment, find the payment, click Details and the details for this payment will appear. Click Print Receipt, or E-mail Receipt. You can reprint a POS receipt in OrderDesk, Pending Orders tab, click Reprint POS Receipt.

Q: Can a service order be checked out with a credit card?

In Service Desk the order must have a status of Finished. Then in OrderDesk, Pending Service Orders tab, you can click Service Order Checkout, or Authorize CC PrePay to pre-authorize a credit card for this order.

Q: I want to pre-authorize a credit card for an order, but the customer doesn't want to keep the card on file?

A: Enter the order for the customer and change the terms to CC PrePay, save the order. On a workstation that has the CIP gateway installed, in OrderDesk, go to the Pending Orders tab, highlight the order, and click the Authorize CC PrePay tab. If a swiper is attached to this workstation, swipe the card, or type in the credit card information. The credit card will be pre-authorized for the amount of the order. Once the credit card has been pre-authorized, the order will now show in the Authorized CC PrePay Orders tab in A/R and can be processed for shipment. After the order has been shipped, and the invoice has been issued and posted the order will move to the UnPaid CC PrePay/AutoPay Invoices tab in A/R, highlight the invoice to be paid and click Pay Selected Invoice.

Q: CIP has closed the batch, but I need to credit an order that was charged using Point of Sale.

A: Enter a credit order for the customer, in the File menu, select F2 POS/Cash Sale Checkout, if a swiper is attached, swipe the card or click CC on file. A credit sale will be created and the dollars will be returned to the credit card.

Q: I setup a credit card on file for a customer. The Credit Info tab in A/R shows the Primary Payment Method as credit card, but the Primary Credit Card says Not on File, why does the card info not show?

A: There might have been a problem when the credit card was initially being setup. If you try and setup the card again, you will get an error such as Customer Not Found. In A/R, highlight the customer and click on the Delete Customer CC Info tab. This will change the payment method from credit card to check for the customer and will delete the customer from the CIP site. Setup the card again for the customer using the Setup/Modify Customer Secure CC Info tab.

Q: A customer does not want to keep a credit card on file any longer, how do I delete the credit card information?

A: In A/R, highlight the customer and click Delete Customer CC Info. This will delete the credit card(s) on file in STEP1 and will delete the customer on the CIP site. The default payment method for the customer will now show Check.

Q: If I want to use a receipt printer for Point of Sale, is there a specific make and model I should use?

A: We recommend the Star TSP700II.

The STEP1 Credit Card Interface can now handle P-Card Level2 processing.