



SoftForward Technologies Inc. VisionPro POS v15.01 XCharge Integration Guide

1. Install XCharge Locked Integration v8.0 Release 4 or higher on the computer designated as the XCharge Server computer. This is an XpressLink EXE Secure integration. The XCharge Client Software is needed on all systems processing payments. XCharge prints the receipt for Canadian users and must be setup accordingly.

A user must be set up in the XCharge Server with the same credentials set up in VisionPro POS. The user must be allowed to perform the following functions in **XCharge Client Options**: Credit Card – Purchase, Credit Card – Return, Credit Card – Void, Credit Card – Debit Purchase, Credit Card – Debit Return.

2. Set up VisionPro POS for XCharge Integration.

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	COMPLETE OPTICAL AND PRACTICE MANAGEM Demo Location Remember My Location Log in Cance

a. Enter Login Information.





b. Go to Edit > System Preferences.



c. The System Preferences pop-up window will appear. Go to the X-Charge option (left window pane). Activate the Enable X-Charge check box. Then enter the X-Charge Account information. Press the Apply button and it'll prompt to restart the software.

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- 3. Run Test Transaction
 - a. On the **My Workdesk**, select **Patient** and the Patient Lookup window will appear.



b. Search for a **Patient** and select the **Patient ID**.

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c. Go to Invoice tab. Click on the New Invoice button.

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d. Add an Item to the invoice (Look up items or services). Select Add Payment button.

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		Invoice New	Invoice Date 12/12/2014
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Group Item Code Description	Type Qty Price	Tax Discount 1	otal Date
SER3558 Eye Sight Test	Service 1 \$50.00	\$0.00 \$0.00	\$50.00 12/12/2014 11:48:46 AM
Discount&Promotions	Credits	12 Print Credits	Sub Total \$50.00 Tax \$0.00
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Created On : 12/12/2014 11:47:59 AM	Created At : D	amo Location	Created By : Harry Premi





e. Select the Payment Method then click on Process by XCharge button.

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TEST TEST Patient ID: PNT0643	ETOBICOKE, ON, CA	H: W: C:	Patient Balance Insurance Balance Total Outstanding Balance	: \$50.00 : \$0.00 : \$50.00
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f. Transaction in progress. Follow prompts on the device screen.

Note: For US Merchants and non-EMV users (who won't be using the IPP320) they will see the Xpresslink window open upon processing.

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g. On the **Patient Order** window, the recently applied transaction appears on the Payments' list. Hit **Save & Close** button. Transaction complete.





4. Notes

- a. Integration Method is XpressLink EXE.
- b. Supported Transaction Types
 - 1) Credit Card Purchase, Return, Void
 - 2) Debit Card Purchase, and Return
 - 3) Integration supports Canadian EMV
- c. XCharge prints the EMV / signature receipts and must be set up accordingly.
- d. Credit Card Return

From the **Patient Order** window, select the payment from the Payments' list. Press the **Return Payment** button. The **Payment Details** window will appear.

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Verify the **Refund** radio button is checked. Verify **Amount** that will be refunded and then hit the **Process by XCharge** button.

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Payment Type	⊖ void	voice Info Location: Demo Location User: Harry Premi Invoice#: 4675
Payment Date 12/12 Payment Method Visa Amount Notes	/2014 × (\$50.00)	Reason
X Transaction ID Balance	6313824 \$0.00	Cancel Ok





A refund transaction will appear on the Payments' list. Refund transaction has been completed.

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e. Credit Card - Void

From the Patient Order window, select a payment from the Payments' list. Press the **Void Payment** button. The **Payment Details** window will appear

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Verify the **Void** radio button is checked. Confirm **Amount** that will be voided and then hit the **Process by XCharge** button.

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TEST T Patient ID: PNT0335 ETOBICOKE, ON,	H: CA W: C:
Payment Type	Invoice Info Location: Demo Location User: Harry Premi Invoice#: 4675
Payment Date 12/12/2014	Reason
X Transaction ID 6395325	Process by CHARGE
Balance \$50.00	Cancel Ok

A void transaction will appear on the Payments' list. The Void transaction has been completed.

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Group Item Code Description	Type Qty Price	ax Discount Total	Date	
SER3558 Eye Sight Test	Service 1 \$50.00	\$0.00 \$0.00 \$50.00	12/12/2014 06:31:03 AM	8
Discount&Promotions Gift Card Amount \$0.00	Credits Patient Insurance	Print Credits Apply Credits	Sub Total \$50. Tax \$0. Discount \$0.	00
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f. Debit Card – Purchase

On the **Invoice Tab**, press **New Invoice** button. Find an item or service from the list and press **Add Payment** button.



Select the **Payment Method (Debit Card)** then click on **Process by XCharge** button.







Transaction in progress. Follow prompts on the device screen.

Note: For US Merchants and non-EMV users (who won't be using the IPP320) they will see the Xpresslink window open upon processing.



A debit transaction will appear on the Payments' list. The transaction has been completed.







g. Debit Card – Return

From the **Patient Order** window, select the payment from the Payments' list. Press the **Return Payment** button. The **Payment Details** window will appear.

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Confirm the **Refund** radio button is checked. Confirm **Amount** that will be returned and then hit the **Process by XCharge** button.







Transaction in progress. Follow prompts on the device screen.

Note: For US Merchants and non-EMV users (who won't be using the IPP320) they will see the Xpresslink window open upon processing.



A debit refund transaction will appear on the Payments' list. The transaction has been completed. Press **Save & Close** button to close the invoice.

