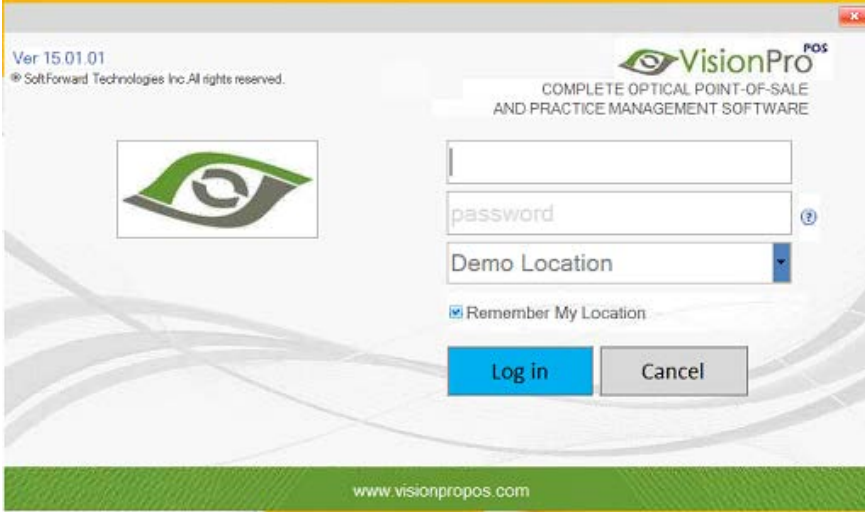# SoftForward Technologies Inc.
# VisionPro POS v15.01
XCharge Integration Guide

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.
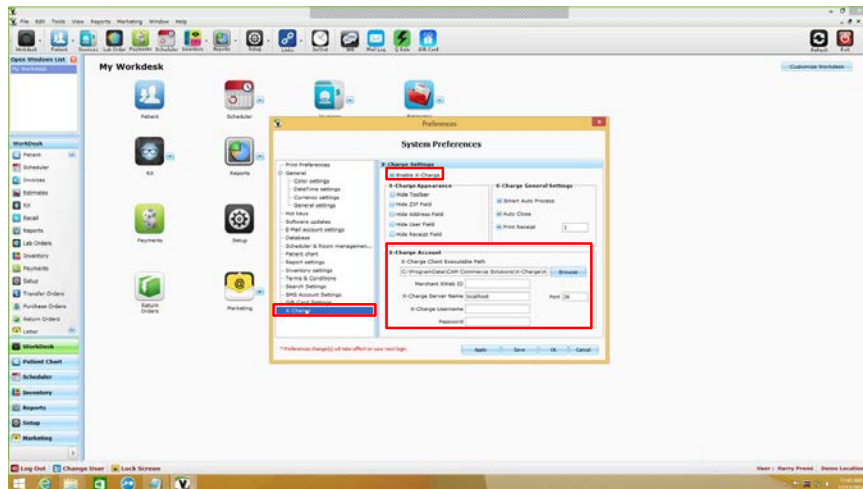
2. Set up VisionPro POS for XCharge Integration.

   a. Enter Login Information.

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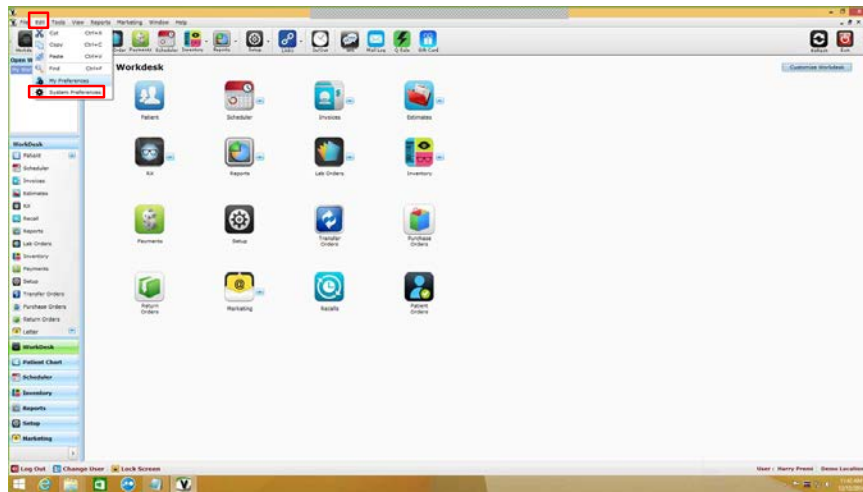
c. The System Preferences pop-up window will appear. Go to the **X-Charge** option (left window pane). Activate the **Enable X-Charge** check box. Then enter the **X-Charge Account** information. Press the **Apply** button and it'll prompt to restart the software.
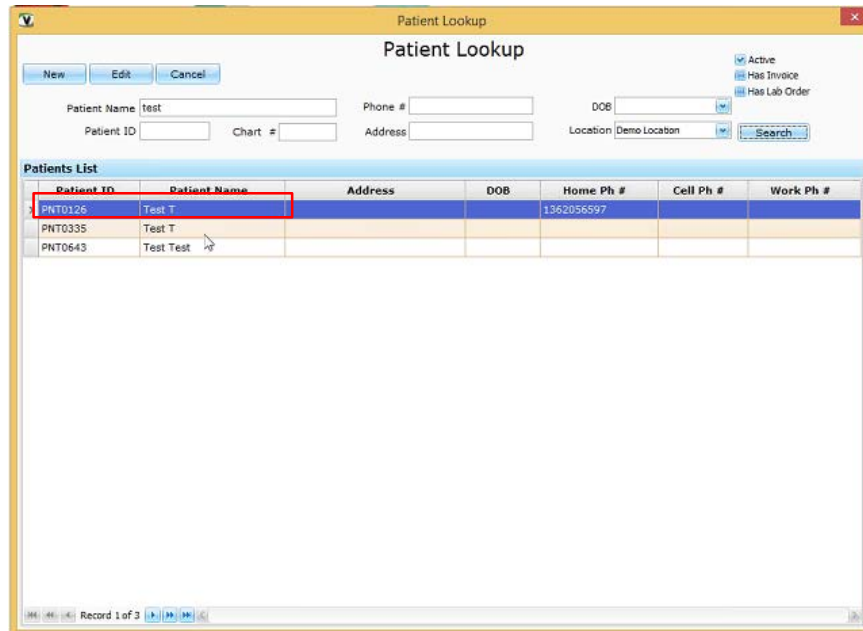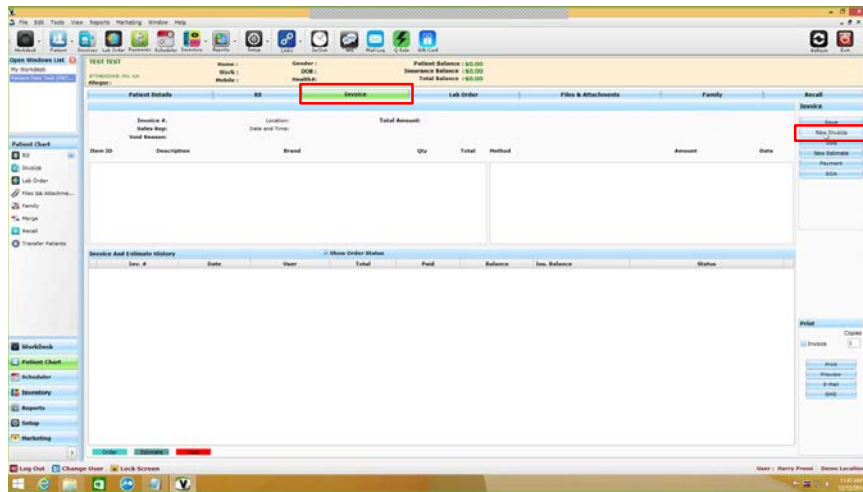
3. Run Test Transaction

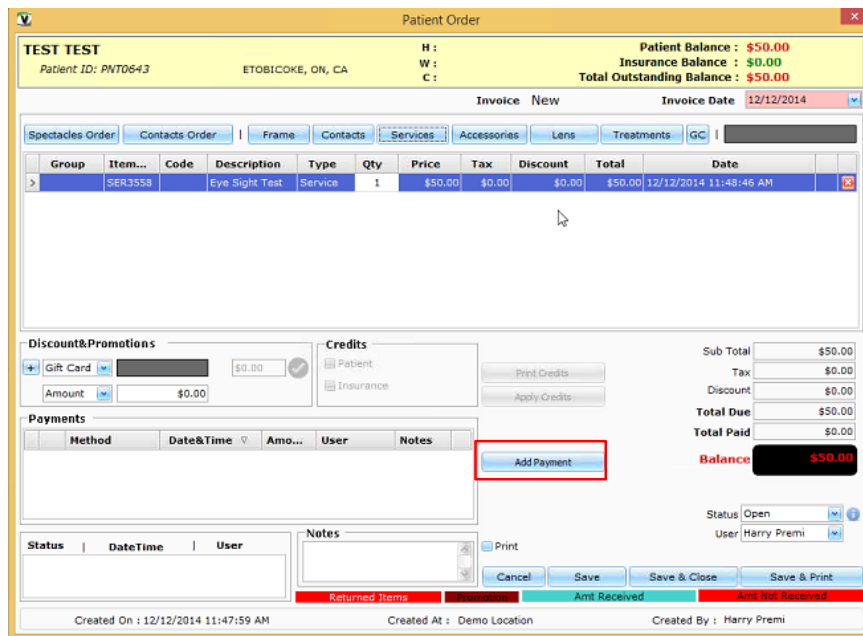   a. On the **My Workdesk**, select **Patient** and the Patient Lookup window will appear.
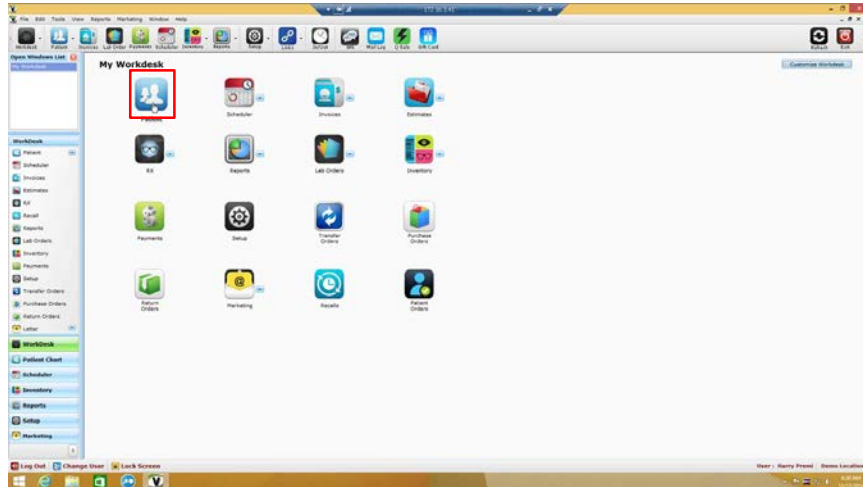
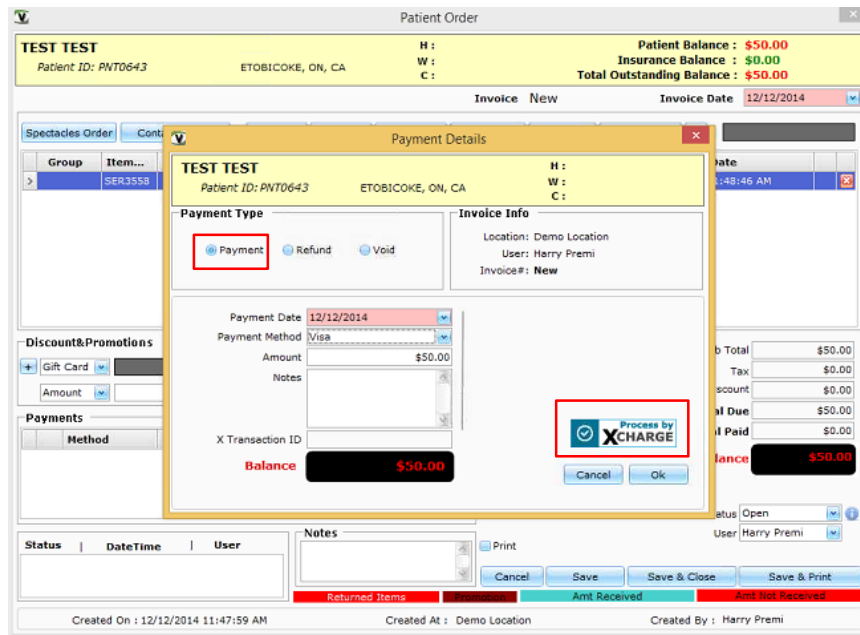   b. Search for a **Patient** and select the **Patient ID**.

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

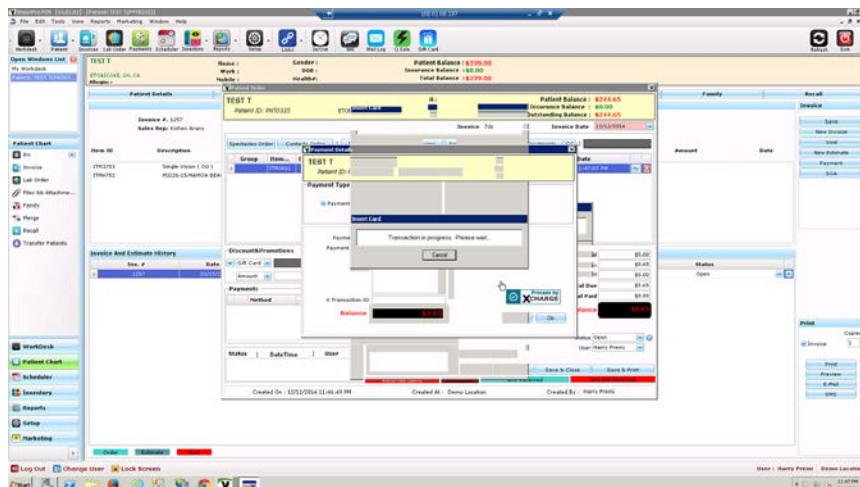d. Add an Item to the invoice (Look up items or services). Select **Add Payment** button.

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

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.


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.
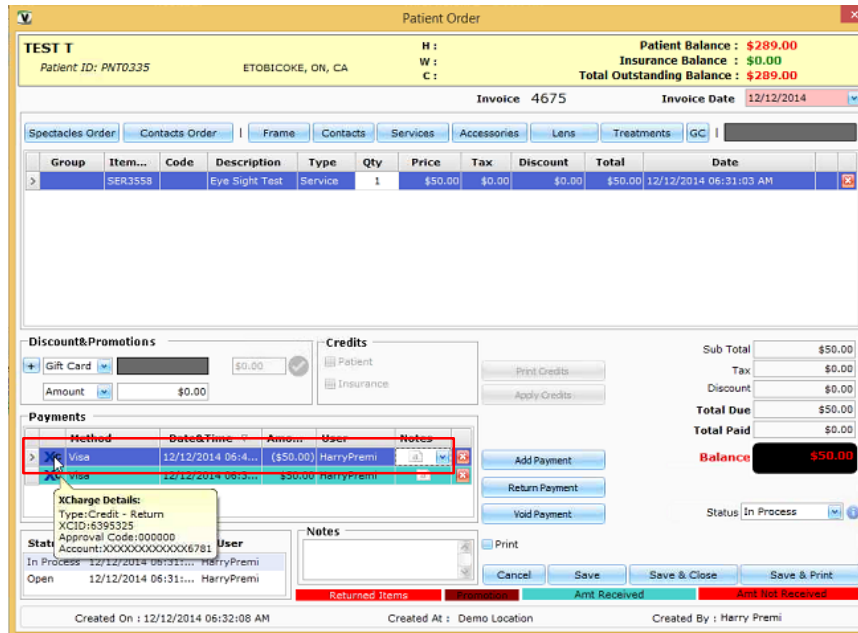
   d. Credit Card - Return

      From the **Patient Order** window, select the payment from the Payments' list.
      Press the **Return Payment** button. The **Payment Details** window will appear.
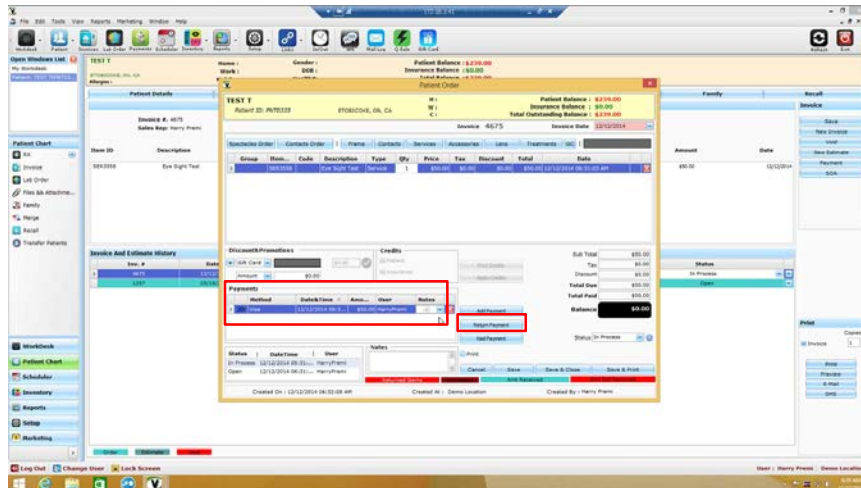
      Verify the **Refund** radio button is checked. Verify **Amount** that will be refunded
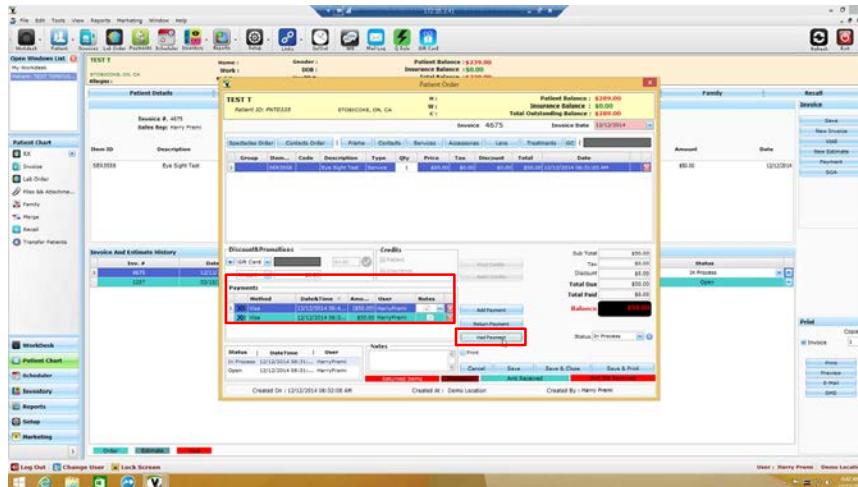   and then hit the **Process by XCharge** button.
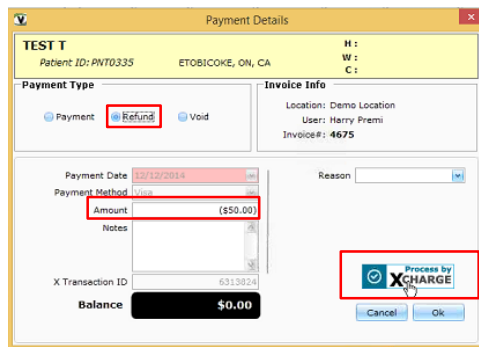
A refund transaction will appear on the Payments' list. Refund transaction has been completed.

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

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

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

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.
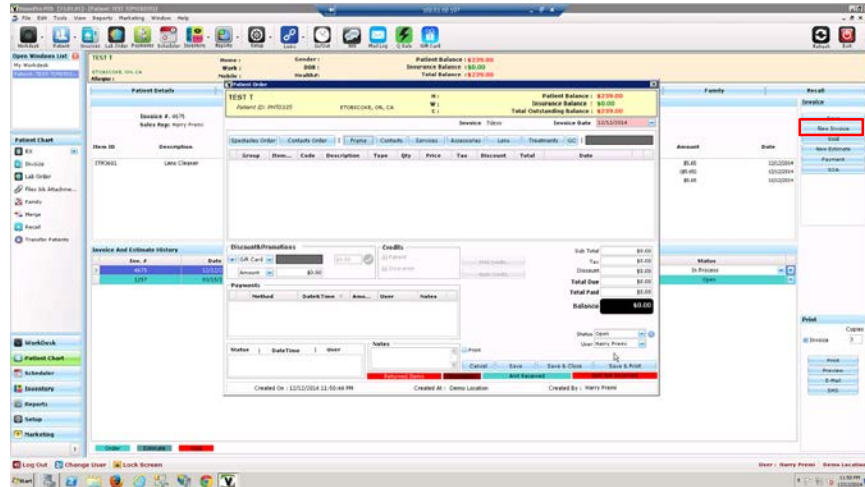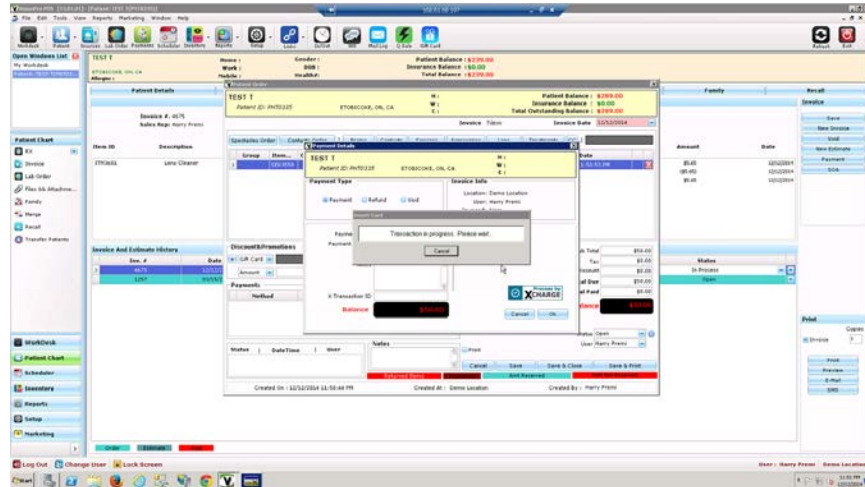

Select the **Payment Method (Debit Card)** then click on **Process by XCharge** button.
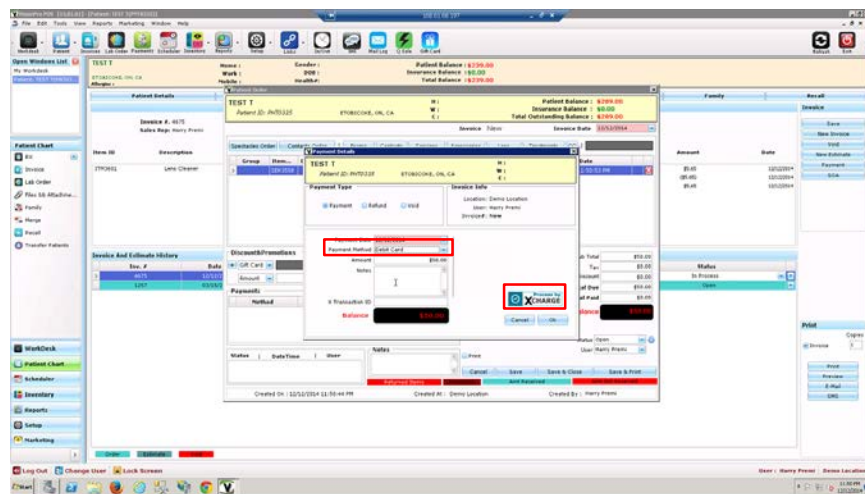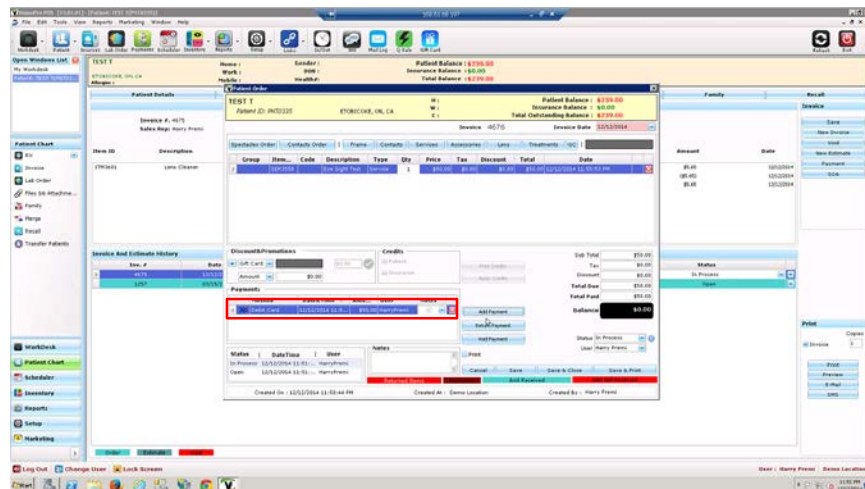
Transaction in progress. Follow prompts on the device screen.

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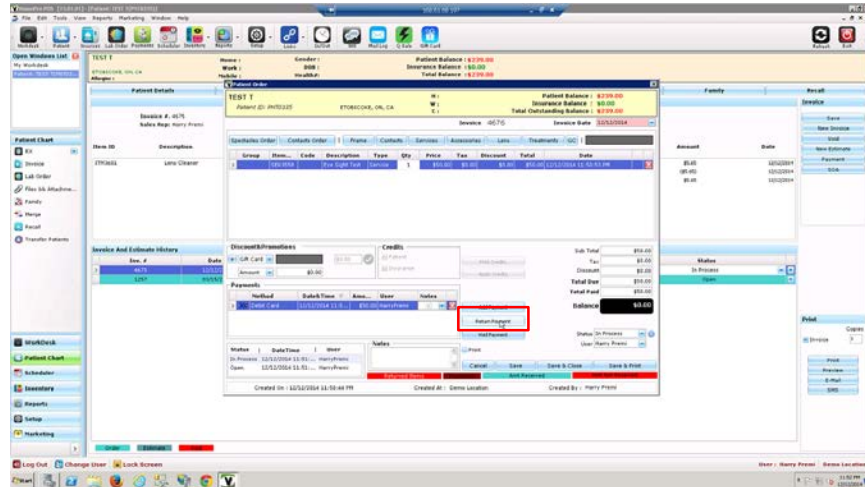

A debit transaction will appear on the Payments' list. The transaction has been completed.
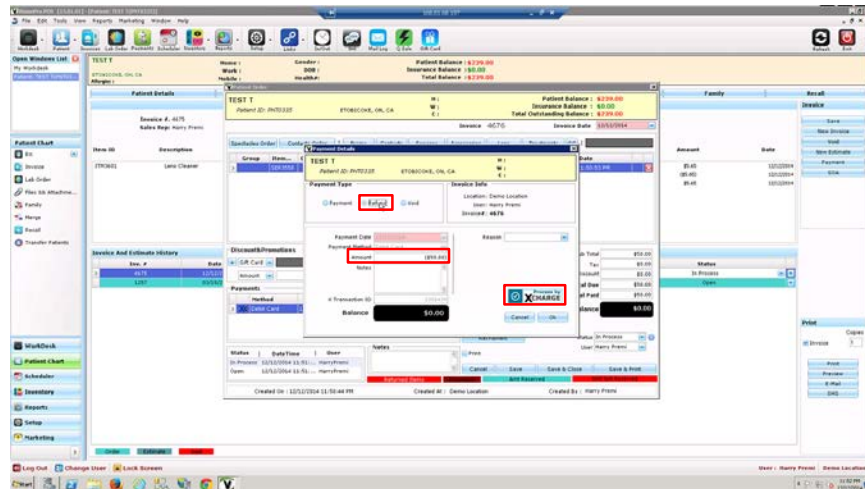
g. Debit Card – Return

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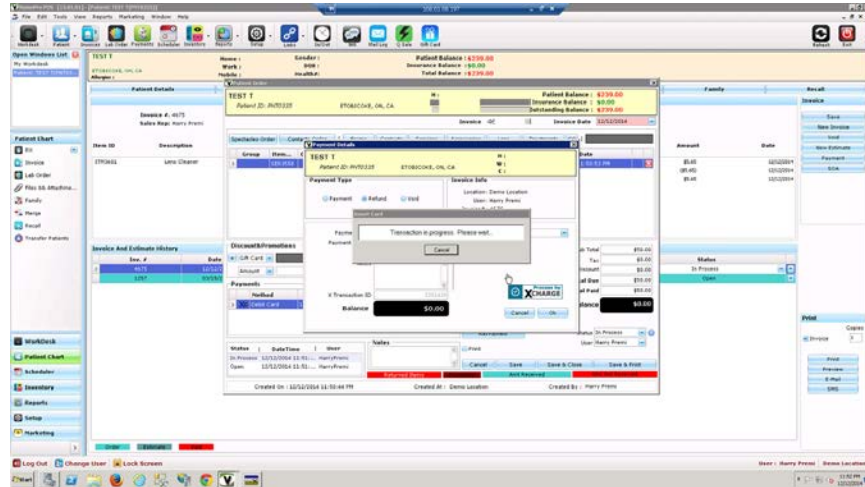

Confirm the **Refund** radio button is checked. Confirm **Amount** that will be returned and then hit the **Process by XCharge** button.

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.