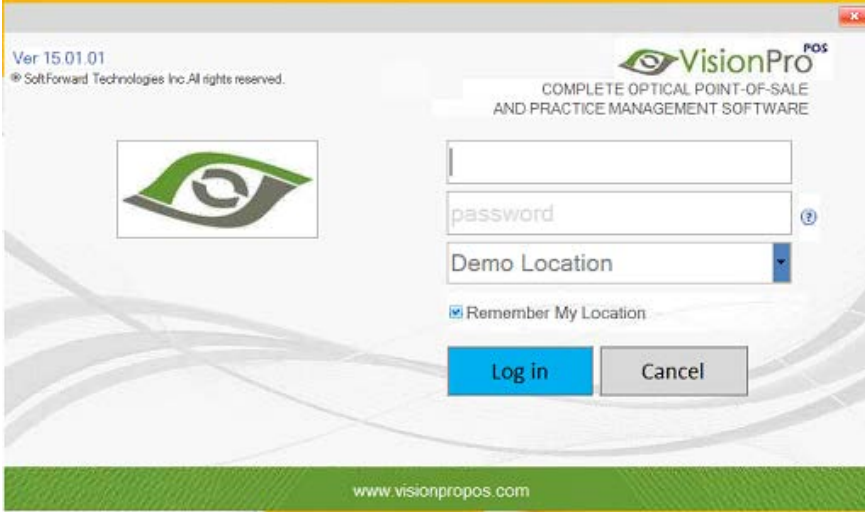


SoftForward Technologies Inc. VisionPro POS v15.01 XCharge Integration Guide

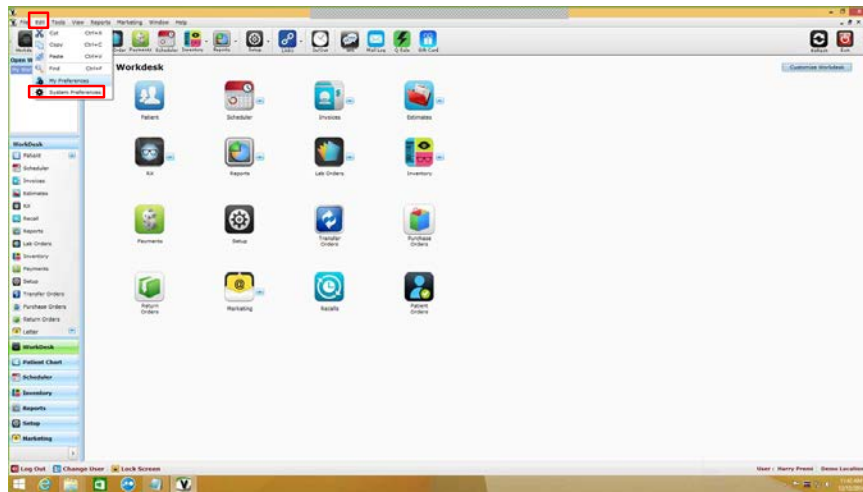
1. Install **XCharge Locked Integration v8.0 Release 4 or higher** on the computer designated as the XCharge Server computer. **This is an XpressLink EXE Secure integration.** The XCharge Client Software is needed on all systems processing payments. XCharge prints the receipt for Canadian users and must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

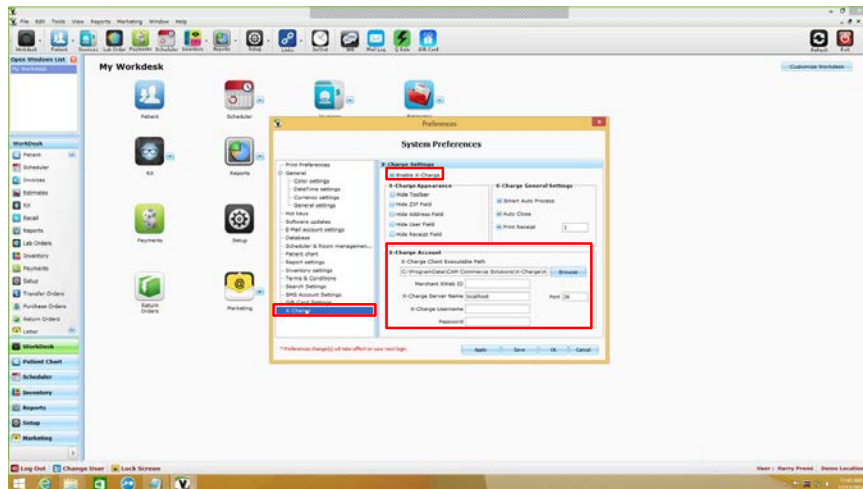
2. Set up VisionPro POS for XCharge Integration.
 - a. Enter Login Information.



b. Go to Edit > System Preferences.

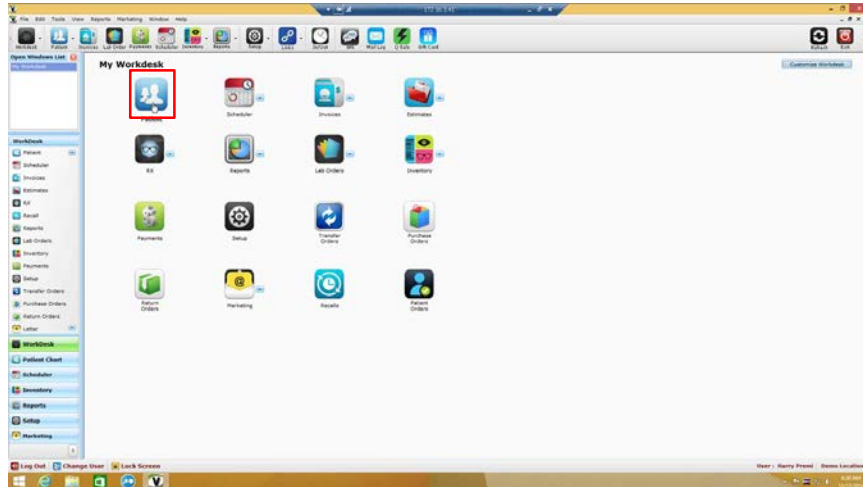


c. The System Preferences pop-up window will appear. Go to the **X-Charge** option (left window pane). Activate the **Enable X-Charge** check box. Then enter the **X-Charge Account** information. Press the **Apply** button and it'll prompt to restart the software.

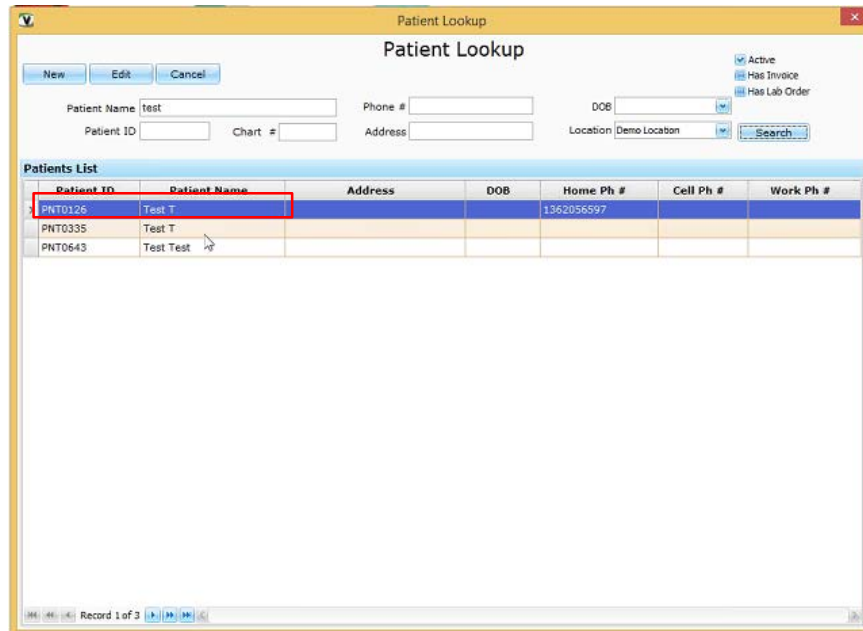


3. Run Test Transaction

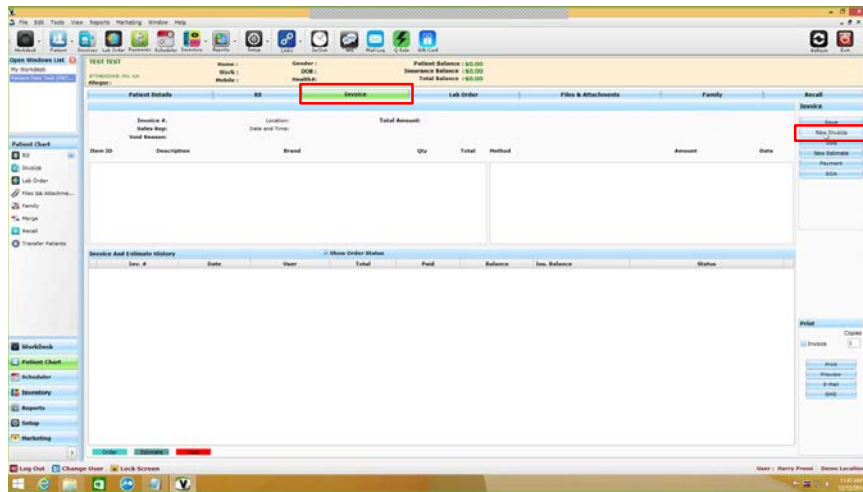
- a. On the **My Workdesk**, select **Patient** and the Patient Lookup window will appear.



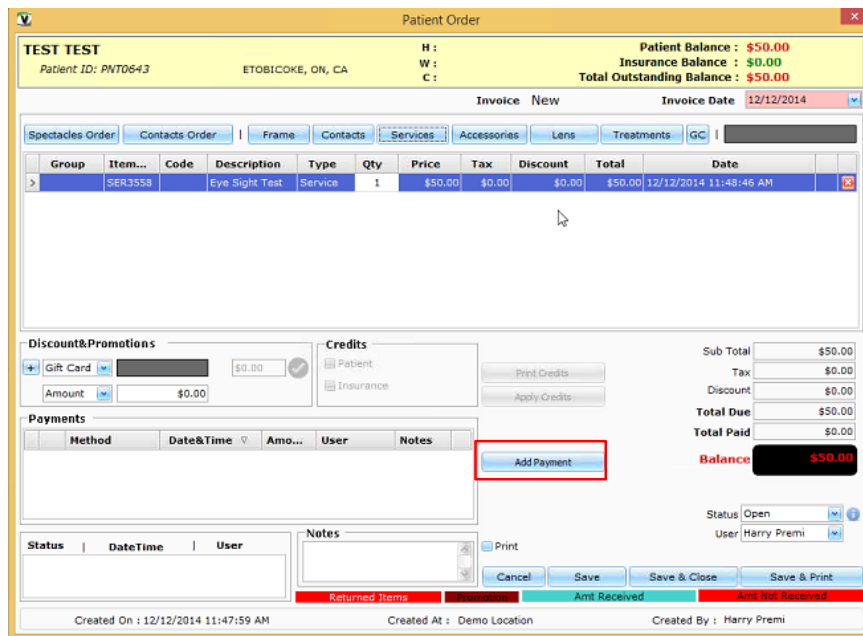
- b. Search for a **Patient** and select the **Patient ID**.



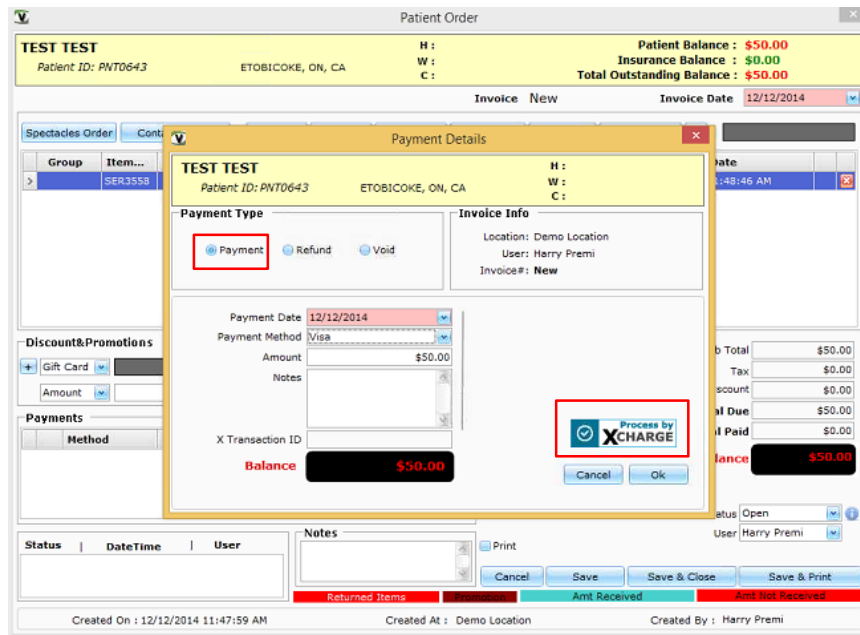
c. Go to **Invoice** tab. Click on the **New Invoice** button.



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

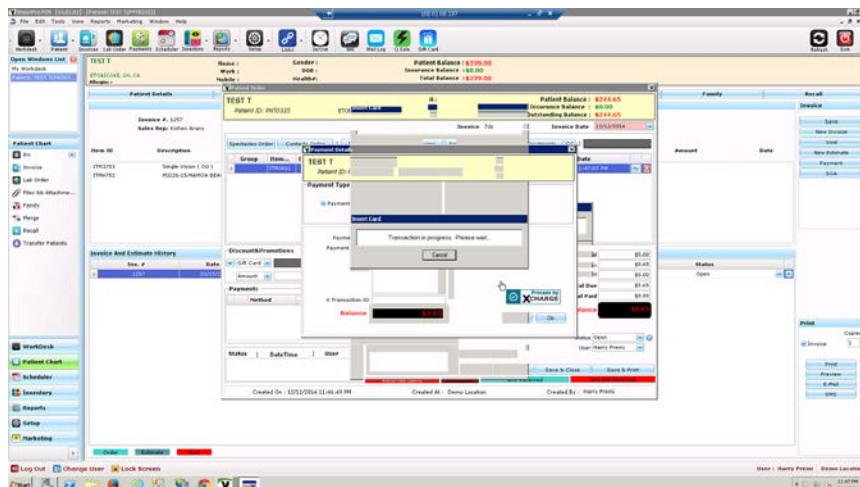


- e. Select the **Payment Method** then click on **Process by XCharge** button.



- 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.

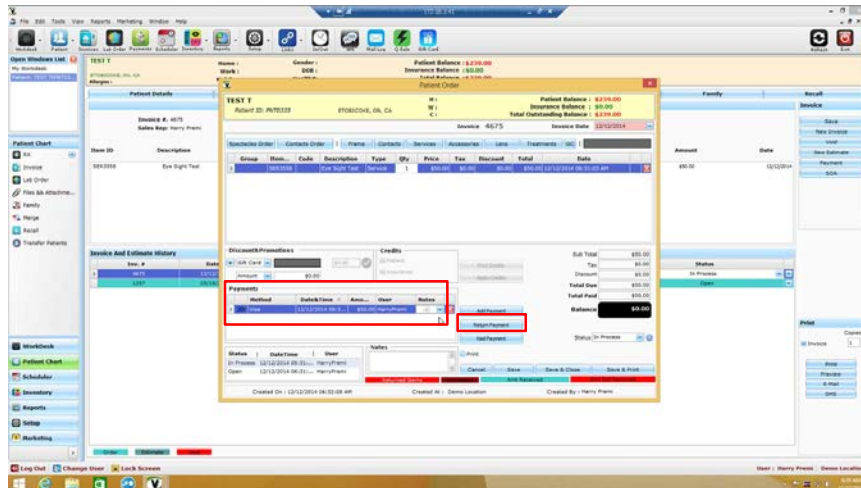


- g. On the **Patient Order** window, the recently applied transaction appears on the **Payments**' list. Hit **Save & Close** button. Transaction complete.

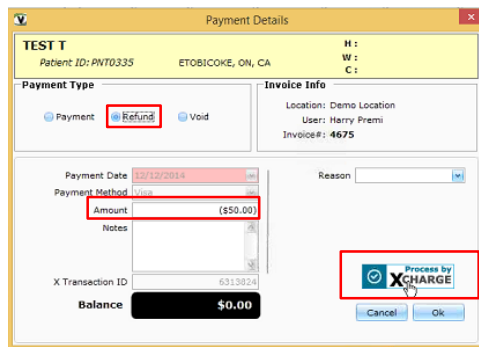
4. Notes

- 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

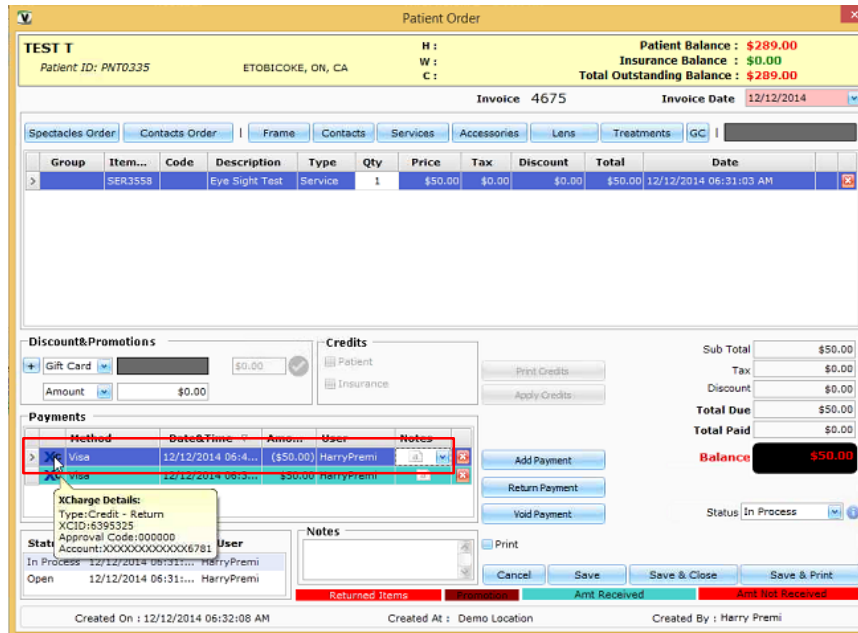
From the **Patient Order** window, select the payment from the Payments' list. Press the **Return Payment** button. The **Payment Details** window will appear.



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

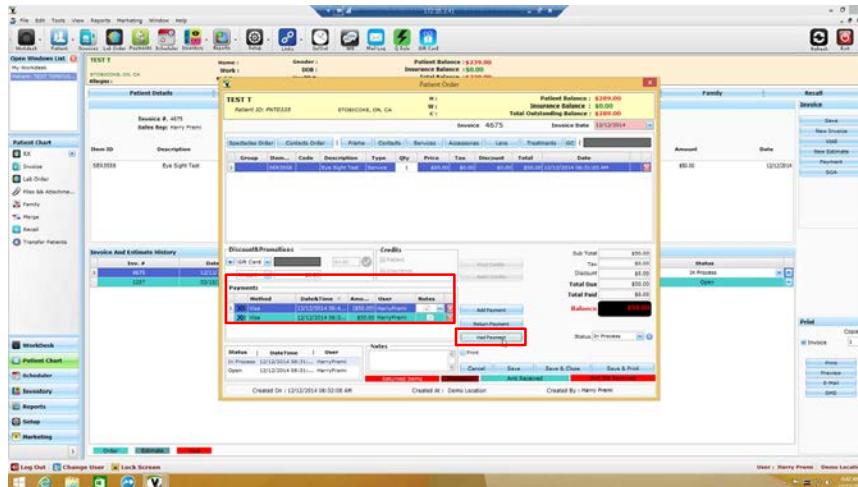


A refund transaction will appear on the Payments' list. Refund transaction has been completed.



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.

Payment Details

TEST T
 Patient ID: PNT0335 ETOBICOKE, ON, CA H :
 W :
 C :

Payment Type
 Payment Refund Void

Invoice Info
 Location: Demo Location
 User: Harry Premi
 Invoice#: 4675

Payment Date: 12/12/2014
 Payment Method: Visa
 Amount: \$50.00
 Reason: [Dropdown]
 Notes: [Text Area]
 X Transaction ID: 6395325

Balance \$50.00

Process by XCHARGE [Button]
 [Cancel] [Ok]

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

Patient Order

TEST T
 Patient ID: PNT0335 ETOBICOKE, ON, CA H :
 W :
 C :
 Patient Balance : \$239.00
 Insurance Balance : \$0.00
 Total Outstanding Balance : \$239.00

Invoice 4675 Invoice Date 12/12/2014

Group	Item...	Code	Description	Type	Qty	Price	Tax	Discount	Total	Date
>	SER3558		Eye Sight Test	Service	1	\$50.00	\$0.00	\$0.00	\$50.00	12/12/2014 06:31:03 AM

Discount&Promotions
 Gift Card: \$0.00
 Amount: \$0.00

Credits
 Patient
 Insurance

Payments

Method	Date&Time	Amo...	User	Notes
Xc Visa	12/12/2014 06:4...	\$50.00	HarryPremi	
Xc Visa	12/12/2014 06:4...	(\$50.00)	HarryPremi	
Xc Visa	12/12/2014 06:3...	\$50.00	HarryPremi	

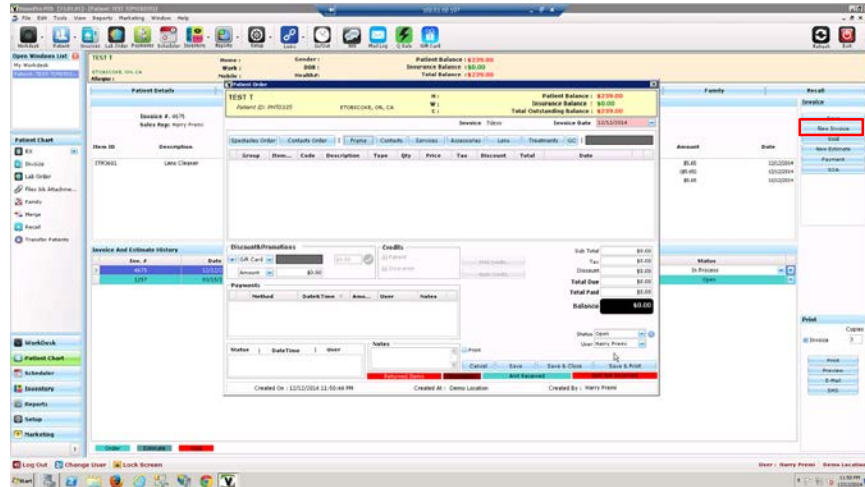
Sub Total \$50.00
Tax \$0.00
Discount \$0.00
Total Due \$50.00
Total Paid \$50.00
Balance \$0.00

Status: In Process

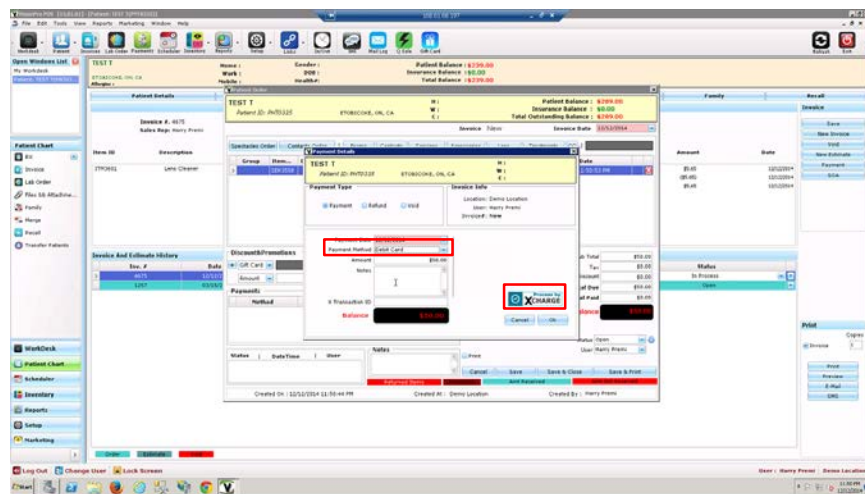
Created On : 12/12/2014 06:32:08 AM Created At : Demo Location Created By : Harry Premi

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.

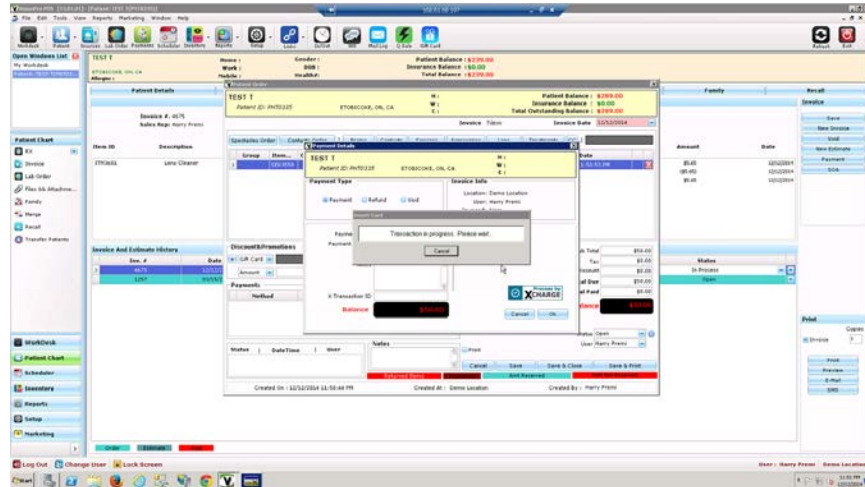


Select the **Payment Method (Debit Card)** then click on **Process by XCharge** button.

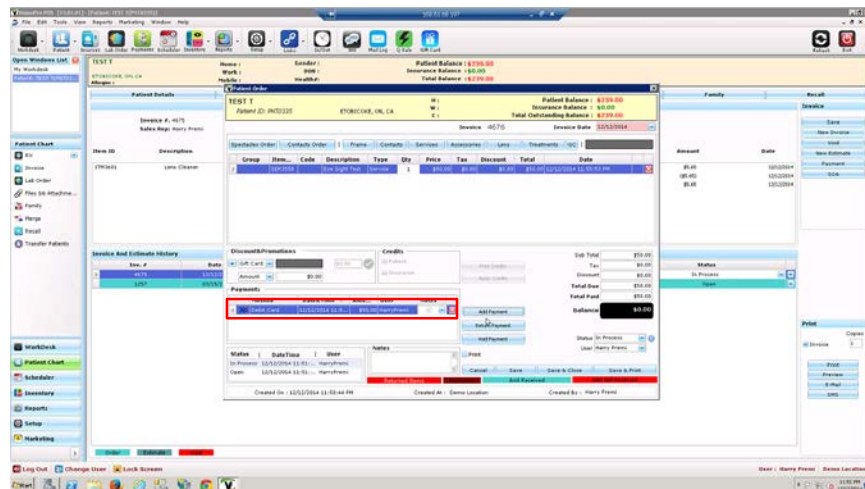


Transaction in progress. Follow prompts on the device screen.

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

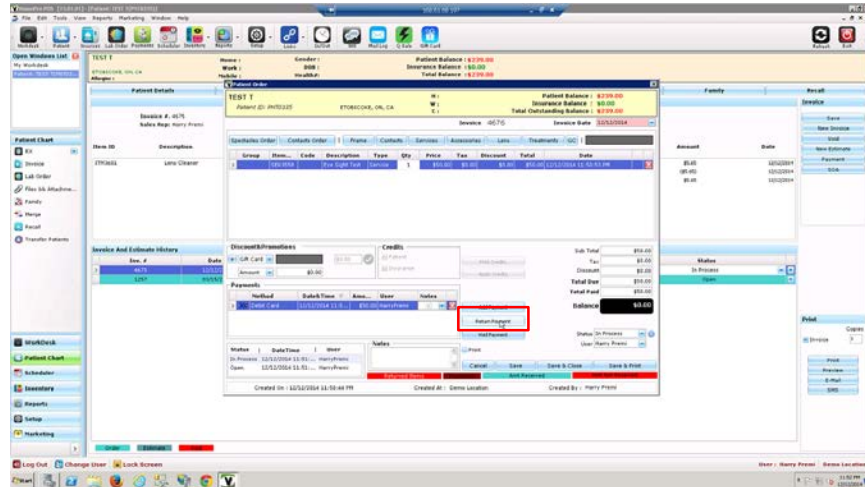


A debit transaction will appear on the Payments' list. The transaction has been completed.

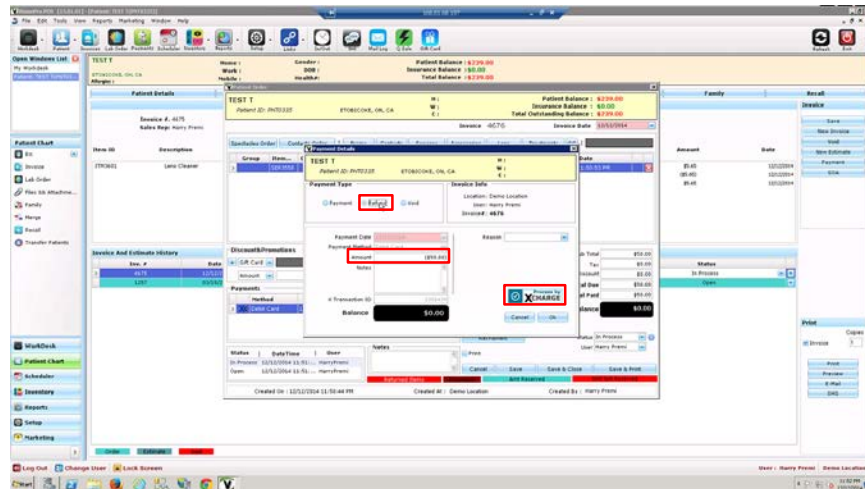


g. Debit Card – Return

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

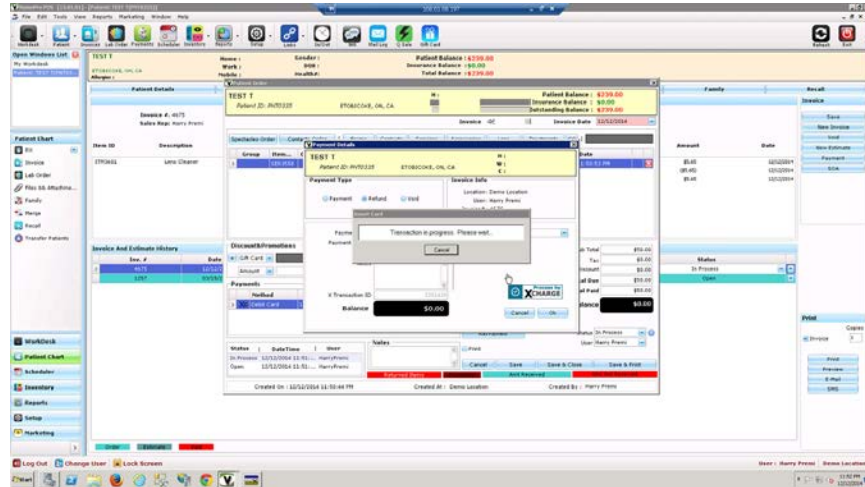


Confirm the **Refund** radio button is checked. Confirm **Amount** that will be returned and then hit the **Process by XCHARGE** button.



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.

