

Set up the Credit Card Processing Module in Control 6.0 and greater

What's the purpose of this step?

The purpose of this step is to set up Control for credit card processing if you are in the United States or Canada.

The steps involved in setup are:

- A. Apply for a Freedom Pay and merchant account through Capital Q for US and NXGen for Canada.
- B. Enter your account information and activate credit card processing.
- C. Setup online payment processing.

A. If you haven't already done so you will need an account with Capital Q and Freedom Pay.

If you are in the US:

- 1) Cyrious Software only supports credit card processing through Capital Q and Freedom Pay. While this may exclude many good suppliers, for quality of service and reliability reasons Cyrious has elected to only maintain one strategic partner in this area. Fortunately, Capital Q's very open cost-plus pricing model has resulted in great savings for Cyrious users and Cyrious is very pleased with the alliance. To sign up, go to <http://www.capitalq.com/cyrrious> or contact Capital Q directly using this contact information:

Proprietor:	Edwin Moore
Email:	ermoore@capitalq.com
Address:	4135 S. Power Rd., Ste. 131, Mesa, Arizona 85212
Phone:	800.887.6227 (1.480.539.7940)

- 2) Freedom Pay Boarding Process: Once a Control user has spoken to Ed Moore at Capital Q, the boarding process begins which can take up to 7 business days to complete.
 - 1) Ed creates a new account for the Control user in Elavon's system. This includes getting banking details, and a signed contract.
 - 2) Ed creates a new account for the Control user in Freedom Pay's system. Here is the information that is Ed will need from the user to send to Freedom Pay:
 - i. The Control user's AVS and CVV tolerance levels.
 - ii. Preferred credit card batch settlement time.
 - iii. Logo, header bar RGB color, and background RGB color for HPP.
 - 3) Freedom Pay finalizes the account setup and provides Ed with the user's StoreID and Terminal ID.
 - 4) Ed sends a secure email to the Control user with their StoreID, TerminalID, and instructions.

If you are in Canada:

- 3)** Cyrious Software only supports credit card processing through NXGen. To sign up, go to <http://www.nxgen.com> or contact NXGen directly using this contact information:

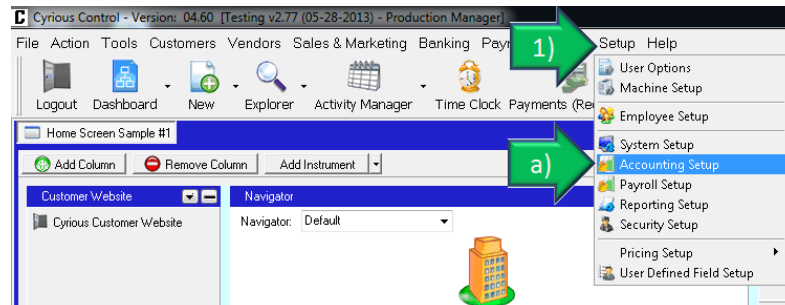
Proprietor:	Don Andrews
Email:	dandrews@nxgencanada.com
Phone:	604.842.1376

- 4)** Freedom Pay Boarding Process: Once a Control user has spoken to Don Andrews at NxGen, the boarding process begins which can take up to 7 business days to complete.
- 1)** Don creates a new account for the Control user in Elavon's system. This includes getting banking details, and a signed contract.
 - 2)** Don creates a new account for the Control user in Freedom Pay's system. Here is the information that is Don will need from the user to send to Freedom Pay:
 - i.** The Control user's AVS and CVV tolerance levels.
 - ii.** Preferred credit card batch settlement time.
 - iii.** Logo, header bar RGB color, and background RGB color for HPP.
 - 3)** Freedom Pay finalizes the account setup and provides Don with the user's StoreID and Terminal ID.
 - 4)** Don sends a secure email to the Control user with their StoreID, TerminalID, and instructions.

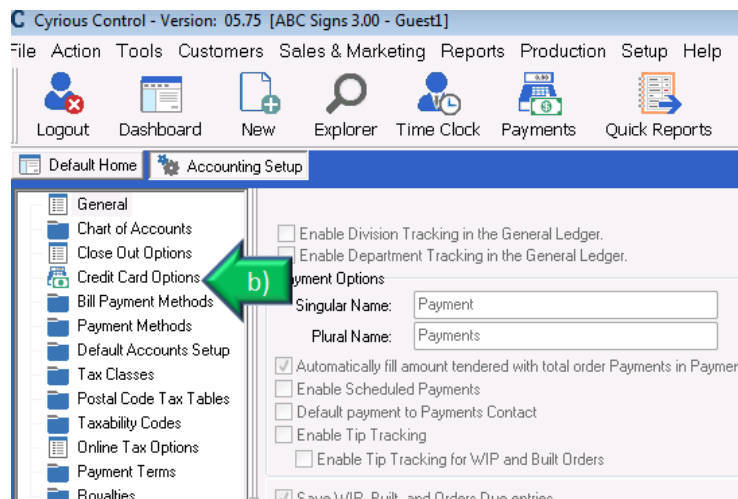
B. Enter your account information and activate credit card processing.

1) Click **Setup**.

a) Click **Accounting Setup**



b) Select **Credit Card Options**.



- 2) Enable credit card processing and enter your account information.
 - a. Click **Edit**.
 - b. Check **Enable Credit Card Processing**.
 - c. Enter your account information provided to you by Capital Q or NXGen.
 - d. Click **Save**.

Control includes the ability to process credit cards and it also gives your customers the option to pay their invoices online. If you are interested in using either of these features, please apply for a merchant account through [Capital Q](#) (for U.S. users) or [NXGen Canada](#) (for Canadian users).

If you already have a merchant account with Capital Q or NXGen, please enter your Terminal ID and Store ID below.

Store ID:

Terminal ID:

☐ Enable Credit Card Processing

All credit cards in Control are stored with FreedomPay via a token, and have an expiration date of 24 months after they are first used in Control. If you would like to extend the expiration date for all tokens that expire(d) last month, this month, or will expire next month, click the Update Token Expiration Date button.

After the migration process is complete, please verify that each active Credit Card Type is linked to its correct Default Bank Account.

Credit Card Type	Default Bank Account
American Express	Undeposited Amex
Discover	Undeposited Discover
MasterCard	Undeposited Visa-MC
Visa	Undeposited Visa-MC

☐ Require Country Code when adding new credit cards

☐ Enable Online Payments

Notification Email:

Reply-To Email:

Send Notification Emails on Payments

- ☒ to the Order's Invoice Contact
- ☒ to the Order's Salesperson
- ☒ to the notification email

If you DO NOT have any stored credit cards in the system, skip to [Section C](#) to learn how to setup Online Payment Processing.

Do this section if you currently have stored credit cards in the system. For more information click on this wiki link. <http://control.cyriouswiki.com/Understanding-the+Credit+Card+Migration+Process>

- 3) Optional: If Control detects that you have stored credit cards in your database you will be asked to migrate your credit cards to Freedom Pay or Delete them from your database. If you previously had credit cards stored in Control, please verify that each active **Credit Card Type** is linked to its correct **Default Bank Account** after the migration process has completed. Otherwise skip this step.

Control has detected that you have existing credit cards stored in your database.

If you plan to process credit cards in Control using FreedomPay's processing services, please click the **Migrate Credit Cards** button to transfer these credit cards to FreedomPay's vault.

If you plan to process credit cards outside of Control using a processor other than FreedomPay, please click the **Delete Credit Cards - Do Not Migrate** button to remove all credit card related information from your Control database.

Performing either of these actions might reduce your PCI Compliance requirements.

[Click here for additional details.](#)

- 4) Optional: All credit cards are stored in Freedom Pay's vault via a token and have an expiration date of 24 months after they are first used in Control. If you would like to extend the expiration date for all tokens that expired last month, this month or will expire next month, click the **Update Token Expiration Date** button.

All credit cards in Control are stored with FreedomPay via a token, and have an expiration date of 24 months after they are first used in Control. If you would like to extend the expiration date for all tokens that expire(d) last month, this month, or will expire next month, click the Update Token Expiration Date button.

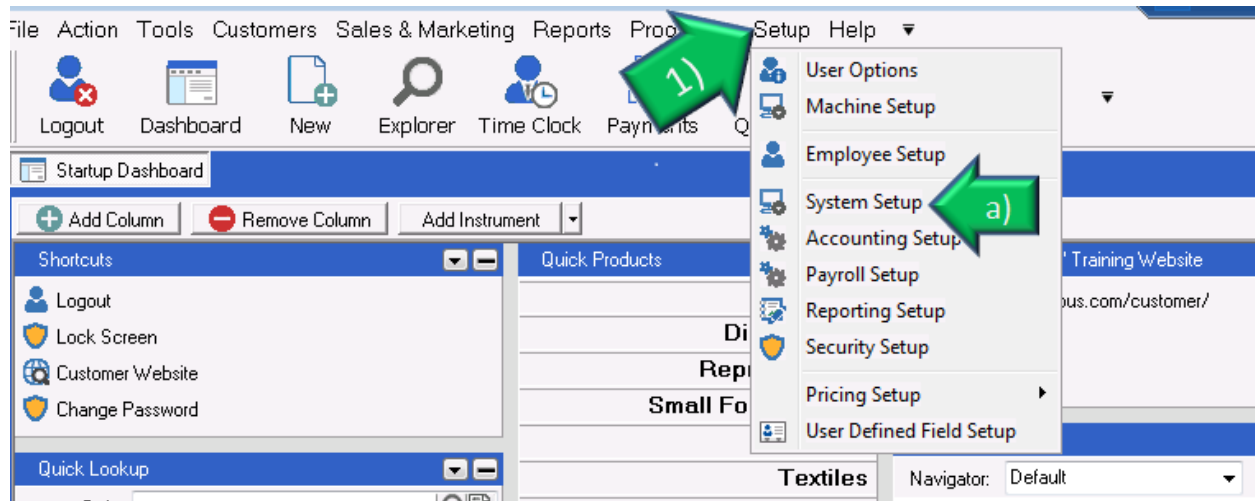
- 5) Optional: If you previously had credit card numbers stored in Control, please verify that each active **Credit Card Type** is linked to the correct **Default Bank Account** after the migration process has completed.

If you previously had credit card numbers stored in Control, please verify that each active Credit Card Type is linked to its correct Default Bank Account after the migration process has completed.

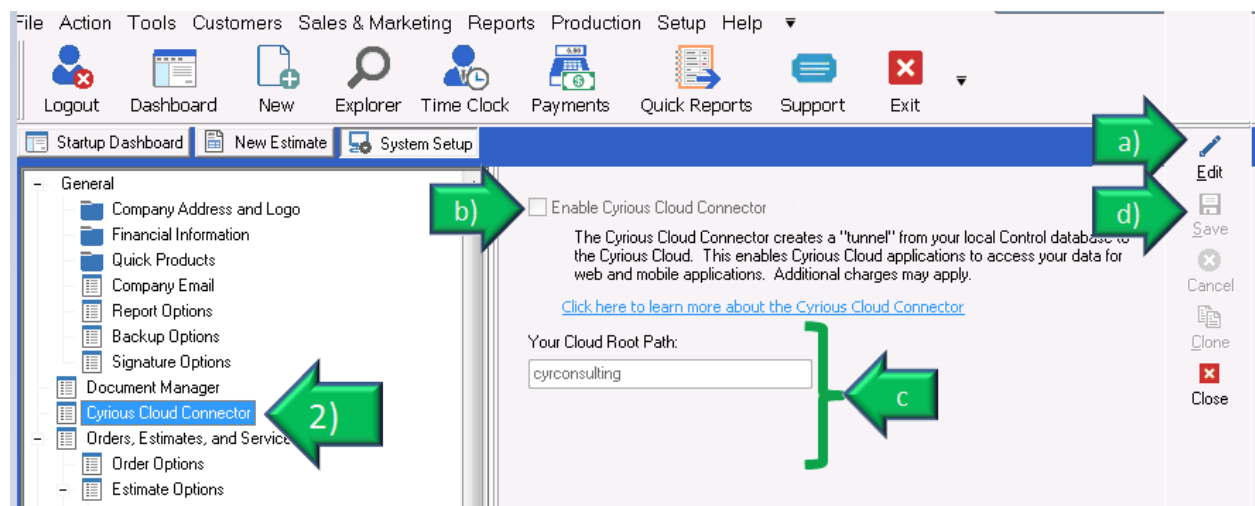
Credit Card Type	Default Bank Account
American Express	Undeposited Amex ...
Discover	Undeposited Discover ...
MasterCard	Undeposited Visa-MC ...
Visa	Undeposited Visa-MC ...

C. Setup online payment processing.

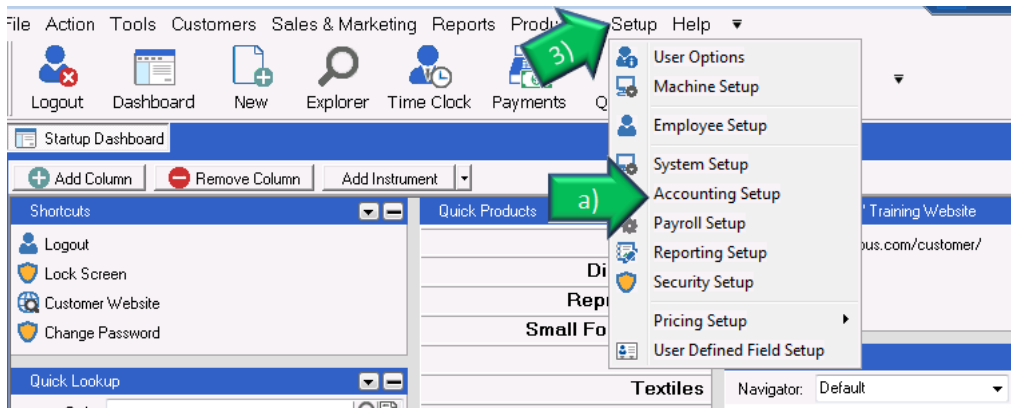
- 1) Click **Setup**.
 - a. Click **System Setup**.



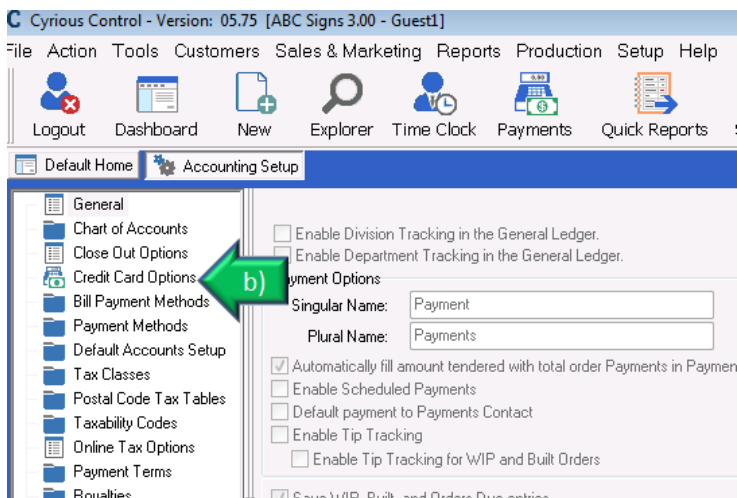
- 2) Click **Cyrious Cloud Connector**.
 - a. Click **Edit**.
 - b. Check **Enable Cyrious Cloud Connector**.
 - c. **Your Cloud Root Path** should be pre-populated, if it is blank please contact your Cyrious Service Team Coordinator.
 - d. Click **Save**.



- 3) Click **Setup**.
- a. Click **Accounting Setup**.



- b. Click **Credit Card Options**.



- c. Click **Edit**.
- d. Check **Enable Online Payments**.
- e. Enter the email address in **Notification Email** of the person that should be notified when payments fail or are not posted to Control. Usually this would be the accounting.
- f. Enter a **Reply-To-Email** address so that automatic email notifications that are replied to aren't missed.