



Credit Card Processing with Element Payment Services (Eterm)

Release 8.7.8

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Epicor Eclipse Rel. 8.7.8 Online Help Documentation

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Publication Date: January 24, 2014

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Credit Card Processing with Element Payment Services Overview

To accept payments using credit cards, Eclipse integrates with Element Payment Services to offer you a solution that does not store customer credit card data on your Eclipse server.

The credit card payment industry has evolved from the days of stand-alone terminals and clunky carbon copy devices that exposed cardholder data to hackers. Eclipse Credit Card Processing with Element is a fully integrated solution that provides highly increased security regarding your customer's credit card data.

Using the Credit Card Processing with Element companion product, you can collect credit card payments on orders as you did before, including the following functionality:

- Accepting credit card payments at the time of sale
- Authorizing (or pre-authorizing) an amount on an order for charging at time of shipment
- Reviewing and processing failed and declined credit card charges
- Applying credits to cards for returns
- Voiding credit card transactions

Important: If you are still running the Credit Card Authorization companion product, some of your windows and procedures might vary slightly from what is described in this documentation. [Click here to use the Credit Card Authorization documentation.](#)

How the Integration with Element Payment Services is Different

As you move from the Credit Card Authorization companion product to the Credit Card Processing with Element solution, consider the following changes to how your company collects and processes credit card payments.

Card Numbers and PASS Accounts

To provide increased security, saved credit card information for customers and orders, including web orders, is now stored on the Element Payment Services secure server in Payment Account Secure Storage (PASS) accounts, and is no longer stored in Eclipse. When you convert to the Credit Card Processing with Element solution, your stored card information is masked in places in Eclipse such as order change logs, and PASS accounts are created for existing information where applicable. For more information about PASS accounts and how they are used, see Element Payment Services and Your Credit Card Transactions.

Hosted Web Pages for Card Number Capture

In addition, when you enter credit card information or swipe a card to gather and save information, the system opens a web browser window with an Element page where you manually enter or swipe the credit card instead of entering it in an Eclipse screen. Eterm launches your default browser, Solar embeds the browser window in a Solar Frame. Because of this process, each computer that you use to collect payments using credit cards must have a web browser installed and have internet access. For more information, see Setup Requirements for Credit Card Processing with Element Payment Services.

Important: Your customers entering orders through your web site also see the Element page to enter their card information and need Javascript enabled in their web browsers.

Swipe Devices

Element Payment Services requires that you upgrade to specific swipe devices that encrypt credit card information prior to sending it to the Element Payment Services server. You must purchase your swipe devices through Epicor Software Corporation, as the devices are specifically configured with an encryption key that works with your implementation of the Credit Card Processing with Element solution. The devices connect directly to your computer using a standard or mini USB connection.

Element Processor Setup

To route credit card information to a credit card company, such as Visa, you must set up each branch that takes credit card orders and processes them through Element Payment Services. For more information, see Configuring the Element Credit Card Processor at Each Branch.

Settlements

Because you enter credit card information and send it to Element Payment Services during the payment collection process, you no longer need to run the Credit Card End of Day Settlement Report to send

transaction information through your company's processor to the credit card companies. Element handles the settlement process of any authorized transactions for you.

If you select Element as your service provider, you have online access to view all your transactions through an Element web site. If you select Element as a gateway service and work with another service provider, your reporting comes through your chosen service processor.

You can still use the Credit Card Summary Report to list all the approved credit card transactions and compare it to your bank statements or service provider reports for reconciliation purposes.

Terminology Changes

Throughout the system, the credit card terminology has been updated to more accurately reflect the action you are taking with the card.

Was...	Is now...
Auth or Authorize	<p>Sale</p> <p>In the Credit Card Processing with Element solution, when you are accepting a payment for a credit card transaction, typically when a customer is present with their card or using a customer's saved card information, you now complete a credit card <i>sale</i>. When you select the Sale option in sales order entry the payment information is sent for processing.</p> <p>When dealing with retail customers, you typically process the credit card sale at the time you enter the order. A sale transaction is the most common type of credit card transaction.</p>
Pre-auth or Pre-Authorize	<p>Authorize</p> <p>In the Credit Card Processing with Element solution, when you are collecting credit card information to charge later, such as waiting to charge the customer for an order until you ship it from your warehouse, you can authorize a credit card sale to ensure that the customer has enough credit available, but without actually charging the customer's account. These transactions are now called <i>authorizations</i>. The second event to actually charge the customer's card is now called an <i>authorization completion</i>.</p>

In addition, Element Payment Services uses the terms that might be new to you:

Term	Definition
Acceptor ID	<p>Much like a merchant number, Element assigns you unique acceptor IDs to identify you as an Element customer. Depending on your business relationship with Element, you might have a different acceptor ID for each branch, or you might have a single acceptor ID that encompasses more than one branch.</p> <p>When payment accounts are created as you save credit card information, they are assigned to the acceptor ID assigned for the branch.</p>
Transaction ID	<p>When you create an authorization or a sale, Element assigns an ID to the payment transaction. When you complete voids or returns, or are investigating disputes, Element uses this transaction ID to identify the transaction in their system.</p>

Term	Definition
Payment Account ID	<p>Credit Card numbers stored on the Element server are termed Payment Accounts and have an ID (also known as a token) associated with them that is stored in Eclipse.</p> <p>The Payment Account ID is a long string of random characters and likely has little meaning to those outside of Element. When you select a stored card based on the card's last 4 digits, card brand and expiration date, Eclipse uses the Payment Account ID in its communication with Element to indicate which card to charge or credit.</p> <p>Note: Orders placed through your web site that are paid for using a credit card send a PASS ID to Eclipse for credit card process.</p>

New Control Record to Disable Authorizations (pre-auths)

If your business does not initially authorize cards to hold funds and confirm available credit before charging the card at a later date, you now have the ability to disable the function from being accidentally selected by your users using the **Disable Auth Only Option For Credit Card Authorizations** control maintenance record.

Element Payment Services and Your Credit Card Transactions

How you enter and accept credit cards within Eclipse can affect charges that you incur. Credit card transaction fees can get complicated and many factors contribute to your total cost of accepting payment using credit cards

The Credit Card Processing with Element solution is designed to offer you flexibility in how you want to implement credit card process at your company. As you are implementing processes for accepting credit card payments, consider how you want to accept and store credit cards to help alleviate any unneeded fees.

Qualification Costs

Each transaction “qualifies” for an interchange rate based on such things as the card brand, card type, card presence, information sent -- your merchant service provider might detail this to you by transaction on your statements or might bucket the transactions and simplify what you see on your statements. Regardless, the timing and process of charging the card through Eclipse can affect the qualification.

As a general rule, card-present, “swipe” transactions qualify for a lower interchange fee than card not-present transactions. When processing through Element Payment Services, the swipe must be directly captured in the Element hosted page while charging the card. In this process, Eclipse has a transaction ID (a token for the specific charge) for handling voids and credits; but Eclipse cannot charge the swiped card for backorder fulfillment.

Payment Accounts and Card Storage Costs

Payment Account Secure Storage (PASS) transactions, are credit card transactions that you make using credit card information that you have on file in Eclipse. Element charges a fee, which you negotiate with them, and is based on the volume of payment accounts stored in their data centers each month.

For each card number stored in a customer or contact record in Eclipse, a payment account is created with Element. Additionally, cards captured on sales orders (not saved to the customer record) in the CC Info screen generates a payment account with Element. Saving credit card numbers gives you the flexibility to charge the card at any time during the order cycle with the customer. However, saving credit card numbers with Element does not necessarily qualify you for the best interchange rate.

Note: Orders placed through your web site that are paid for using a credit card send a Payment Account ID to Eclipse for credit card process.

Consider the following examples. A customer walks up to your counter and orders two items: one is available for the customer to take with them, one is backordered. The customer presents their credit card for payment. You can do any of the following and be charged different rates:

- **Scenario 1: Best rates, but two swipes** - Charge the card for the one item that is available using a swipe transaction and also swipe the card *again* in the CC Info screen in order entry to create a payment account for charging the card when the backordered item ships.
- **Scenario 2: One swipe, but not optimal rates** - Capture the card in the CC Info screen in order entry to establish a payment account. Select the payment account to charge the card for the available item. This qualifies for a card-not-present interchange rate. However, the payment account is available for charging when the backordered item ships

- **Scenario 3: Charge the card for both items using a swipe transaction** - This may or may not be permissible based on your agreement with your merchant service provider and how you document your card-charging policies to your customer.

To qualify for the best per transaction process rate, swipe or manually enter a customer's credit card for immediate payment for an order, without saving the card information.

Use the PASS Account Utility to help manage the payment accounts your operations generate with Element Payment Services. The utility provides you the tools to minimize the volume of payment accounts to those required for your business. For more information, see [Managing Element Payments Accounts Overview](#).

Credit Card Level 3 Processing

Credit Card Processing with Element includes Level 3 credit card processing. Using Level 3 processing can result in lower qualification costs by sending more detailed transaction information for commercial and government transactions.

Level 1 data includes the merchant name, amount, and date for each transaction. Level 2 includes:

- Tax Amount
- Customer Code
- Merchant Postal Code
- Tax Identification
- Merchant Minority Code
- Merchant State Code

For each branch that is enabled for Level 3 credit card data in the **Allow Sending Credit Card Level 3** Data control maintenance record, the system sends the following additional data for each credit card transaction. If necessary, you can override the branch setting at the customer level using the **Allow Sending Credit Card Level 3 Data for Customer** field in the Credit Control Parameters in Customer Maintenance.

- Item Product Code
- Item Description
- Item Quantity
- Item Unit of Measure
- Item Extended Amount
- Item Net/Gross Indicator
- Item Tax Amount
- Item Tax Rate
- Item Tax Identifier
- Item Discount Indicator
- Ship from Postal Code
- Freight Amount
- Duty Amount
- Destination Postal Code
- Destination Country Code
- Alternate Tax Amount

Summary Data Sent in Element Fields

The following summary information is sent to Element Payment Services for each credit card transaction:

Element Field	Data Sent	Eclipse File and Attribute
Alternate Tax Amount	0	N/A
Customer VAT Registration Number	Ship-to customer entity tax exempt number for the state in which the ship-to customer resides	ENTITY, attribute 34 and 4
Destination Country		840
Destination Zip Code	The zip code of the ship-to address	LEDGER 75, ENTITY attribute 5 if LEDGER is blank; '-' changed to ''
Discount Amount	Discount total that the SOE.CALC.DISC program calculates	N/A
Duty Amount	Duty charges for those items that go through customs	If LEDGER 48, line item duty stored in attribute 78
Freight Amount	The total freight for the order generation	LEDGER 57, 0 if blank
Line Item Count	The number of line items included on the order, excluding comments and subtotals	N/A
Merchant VAT Registration Number	Ship branch entity tax exempt number for the state in which the ship branch resides	ENTITY, attribute 34 and 4
National Tax	0	N/A
Order Date	The date the order is entered	LEDGER, attribute 4
ShipFrom Zip Code	Branch entity's zip code	ENTITY, attribute 5; "-" changed to ''
Summary Commodity Code	Dist	N/A
Unique VAT Invoice Reference Number	Sales order number with the generation information	N/A
VAT Amount	Tax amount that the OE.TAX.CALC.AMTS program calculates	N/A
VAT Rate	Tax rate that the OE.TAX.CAL.AMOUNTS program uses to calculate the tax	N/A

Line Item Detail Data Sent in Element Fields

The following line item detail information is sent to Element Payment Services for each credit card transaction:

Element Field	Data Sent	Eclipse File and Attribute
Alternate Tax Identifier	Blank	N/A
Debit Credit Code	2 if the extended price is greater than or equal to 0; otherwise, 1	
Discount Code	1 if Discount Amount is not zero or is blank; otherwise 2	N/A
Extended Item Amount	Sell Price * Quantity	N/A
Item Commodity Code	Product file commodity code, "Merchandise" if product file is blank	PRODUCT, attribute 14
Item Description	The first 35 letters of the product's description	N/A
Line Item Discount Amount	The proportion of the total discount that applies to each line item, calculated as: Extended Price/Generation Total (Sum of Ledger attribute 15) * Total Discount (Cash + Web Commerce discount calculated by SOE.CALC.DISC)	N/A
Line Item Total Amount	The total amount for the line item calculated as: Extended Price + Tax Amount - Discount Amount	N/A
Line Item VAT Amount	Line item tax that the GET.LDID.TAX.AMT program calculates	N/A
Line Item VAT Rate	Line item tax rate that the GET.LDID.TAX.AMT program uses to calculate the line item tax	N/A
Net Gross Code	1	N/A
Product Code	The internal Eclipse product ID.	LEDGER.DET, attribute 1
Quantity	Total quantity of the item ordered.	LEDGER.DET, attribute 4
Rate	Discount Amount / Extended Price * 100; 0 if extended price is blank or 0	N/A
Unit Cost	The selling price of the product out to two decimal places	LEDGER.DET, attribute 8
Unit of Measure	The units, such as ea or box, in which the product was ordered	LEDGER.DET attribute 23
VAT Type	Blank	N/A

Credit Card Processing with Element Setup Overview

Prior to processing credit card transactions, complete the following setup tasks:

- Set the appropriate control maintenance records and authorization keys to configure how the credit card process works for your site and your users
- Configure the Element credit card processor at each branch
- Enter the appropriate URL addresses for Element credit card processing
- Test the connection to the Element Credit Card Processing Site
- Define default customer and contact credit cards
- Assign credit card authorization upcharges to your shipping methods

If you use the Credit Card Authorization companion product, the weekend of your Element Payment Services solution go live, you must run the credit card conversion utilities to prep your system for Monday morning.

Setup Requirements for Credit Card Processing with Element Payment Services

Following are the control maintenance records, authorization keys, and additional setup requirements for Credit Card Processing with Element..

Control Maintenance Records

- Allow Sending Credit Card Level 3 Data
- Credit Card: Default Reference Number
- Credit Card Administrator
- Credit Card Collection Approval Mode
- Default Auth Method For New Credit Cards
- Disable Auth Only Option For Credit Card Authorizations
- Disallow Auto Apply Of Credit Card Payments
- Notification Method When Credit Card Auth Fails
- Override Print Status On Credit Card Denial
- Require CVV ID On Keyed Element Credit Card Sales/Authorizations
- Sales Order Entry Return Setup
- User To Be Messaged With Credit Card Communication Errors

Web Commerce Control Maintenance Records

- Credit Card: WOE Authorization Method
- Display The Credit Card Information Page In WOE
- Force Information To Be Entered On The WOE Credit Card Page

Authorization Keys

- CREDIT.CARD.ACCT
- CREDIT.CARD.SETUP
- OVERRIDE.RETURN.PAYMENT

Users must have this authorization key assigned to select a credit card from the selection list if a card is already saved to the order.

Other Required Setup

Prior to using Element Payment Services, you need to also ensure that you have done the following:

- Worked with your Element representative to determine how your account is set up. For example, are you using Element as your credit card processor, or as a location to store credit card data and as a gateway to another processor.
- Purchased swipe devices for computers at which you swipe credit cards. You must purchase your swipe devices through Epicor Eclipse, as they are configured specifically with an encryption key that works with your implementation of the Credit Card Processing with Element solution. The devices connect directly into your computer using a standard or mini USB connection.
- If you are running Internet Explorer 8.0 on the Windows 7.0 or Windows Vista operating system, there is a known display error when launching Internet Explorer from Eclipse. To correct this problem, leave an Internet Explorer 8.0 browser window open while you are entering orders and accepting payments using credit cards in Eclipse. Or, set Mozilla Firefox as your default browser. The system uses your default browser when you swipe or manually enter card information. Using Firefox does not require that you leave a browser window open.
- Configure the Element payment processor at each branch that collects credit card payments. For more information, see [Configuring the Element Credit Card Processor at Each Branch](#).

Configuring the Element Credit Card Processor at Your Branches

Eclipse is certified with Element Payment Services (a credit card processor) that enables your company to route credit card information to a credit card company, such as Visa, when your customers place credit card orders. Set up each branch that takes credit card orders and processes them through Element Payment Services

To edit the credit card information for a branch, you must be assigned the CREDIT.CARD.SETUP authorization key.

If you are using Element Payment Services, test the connection to the Element processing site after you configure the card processor.

Note: If you are not using the Element credit card processor, the procedure to configure the card processor at each branch differs from the one provided below. You need to enter merchant, device, and terminal ID information for your card setup, along with additional information that your processing bank provides to you.

To configure the Element credit card processor at each branch:

1. From the **Files > Branch** menu, select **Branch** to display the Branch Maintenance screen.
2. In the **Branch ID** field, enter the branch to display the branch record, and use the **CC Proc** hot key to display the Credit Card Branch Setup screen.
3. In the **Processor** field, enter **Element** to indicate that you are setting up the Element credit card processor..

The remaining fields do not apply for the Element credit card processor. However, if your cursor moves to the **Merchant ID** field, enter **Unused** to be able to move on to the next step.

4. Use the **Add'l Info** hot key to display the Additional Credit Card Information screen and complete the following additional information that Element Payment Services provides to you regarding your account.

Note: Eclipse technical support typically enters this for you when setting up your credit card functionality.

Field	Description
Account ID	Your account identification number with Element Payment Services.
Account Token	The number used for authentication with Element Payment Services' web sites.
Terminal ID	The number the credit card process assigns to you. This number can vary by merchant.
Acceptor ID	Your merchant identification number. As an "acceptor," you are a business that is qualified to accept a credit or debit card as payment for an order.

5. Use the **Edit URLs** hot key and enter the web site addresses that Element Payment Services has provided you for reporting, transactions, and services. The Services URL is the Payment Account transactions
6. Test the connection to the Element processing site.

7. Save your changes and save the branch record.

Entering URL Addresses for Element Credit Card Processing

Eclipse is certified with Element Payment Services (a credit card processor) that enables your company to route credit card information to a credit card company, such as Visa, when your customers place credit card orders. The URLs that Element Payment Services provides you are the same for each branch.

Note: After you set up one branch for Element credit card processing, each subsequent branch uses the same URLs, and you do not need to enter them again. The URLs are located at the branch level, because the system requires the branch-level information to complete the test connection (health check).

To edit the credit card information for a branch, you must be assigned the CREDIT.CARD.SETUP authorization key.

After defining the URLs, test the connection to the Element processing site.

To enter URL addresses for Element processing:

1. From the **Files > Branch** menu, select **Branch** to display the Branch Maintenance screen.
2. In the **Branch ID** field, enter the branch to display the branch record, and use the **CC Proc** hot key to display the Credit Card Branch Setup screen.
3. Select the Element processor in the list, and use the **Add'l Info** hot key to display the Additional Credit Card Information screen.
4. Use the **Edit URLs** hot key and enter the web site addresses that Element Payment Services has provided you for reporting, transactions, and services. The Services URL is the Payment Account transactions.
5. Test the connection to the Element processing site.
6. Save your changes and save the branch record.

Testing the Connection to the Element Credit Card Processing Site

For each branch, test the connection to Element Payment Services to verify that the account information you entered for the branch is correct, and that you have access to the web site addresses you entered for reporting, transactions, and services . If you update the account information, or add a new branch, retest the connections to ensure that your system has access to what it needs to complete credit card processing with Element.

You must set the URLs for the transaction, reporting, and service connections for a branch prior to testing the connection.

To test the connection to the Element processing site:

1. From the **Files > Branch** menu, select **Branch** to display the Branch Maintenance screen.
2. In the **Branch ID** field, enter the branch to display the branch record, and use the **CC Proc** hot key to display the Credit Card Branch Setup screen.
3. Select the Element credit card processor, or set up a new processor for Element, and use the **Add'l Info** hot key to display the Additional Credit Card Information screen.
4. Use the **Health Check** hot key to start the connection test.

The system checks the account information you have entered, and whether you can access the web sites for transactions, reporting, and services. If the test is unsuccessful, verify that you have entered the account information and URLs for the web sites correctly, and repeat step 3.

You can also run a test from the window where you enter URLs.

Assigning Credit Card Authorization Upcharges to Ship Vias

When you are authorizing a credit card payment for an order, you might not know what the final order total is going to be due to freight and handling charges. For each shipping method you have defined in your system, assign a default upcharge to add to the order total that you are authorizing on the customer's credit card to estimate and cover freight and handling charges. During credit card authorizations, the system adds this amount to the total order amount. This additional amount ensures that there are enough authorized funds available on the card to pay for the goods and potential shipping and handling fees.

To assign credit card authorization upcharges to a ship via:

1. From the **Maintenance** menu, select **Ship Via** to display the Ship Via Maintenance window .
2. In the **Ship Via** field, enter the shipping method to which you want to assign the information.
3. Click the **Additional Information** tab to display the Credit Card Information area.
4. In the **Percent Upcharge %** field, enter the percentage of the total order amount to add to the authorization amount to cover any freight or handling fees.
5. In the **Minimum Upcharge** field, enter the minimum upcharge to add to the total if the upcharge determined by the percent in the **Percent Upcharge** field is less than this amount.
6. Save your changes and exit the window.

Collecting Order Payments Using Credit Cards Overview

How you collect a credit card payment on an order is determined by the policies that your company has established.

You can accept payments on credit cards using the following methods:

- Using a new card or saved card at the time a sale is made.
- By authorizing a payment on a new or saved card, but not charging the card at the time you enter the sales order.

How you enter and accept credit cards within Eclipse can affect charges that your company incurs. For more information, see [Element Payment Services](#) and [Your Credit Card Transactions](#).

Accepting Credit Card Payments for Orders

The Credit Card Processing with Element solution is designed to offer you flexibility in how your company implements its procedures for accepting credit card payments for orders. Check with your supervisor if you are unsure about whether you should save a customer's credit card information for later payment, or accept payment at the time of the order. The procedures below describe how to accept a full or partial credit card payment for an order.

Note: Element contains logic that checks for duplicate charges. If two charges for the same amount are made to the same card during the batch period, the second charge is declined. The batch period is set between you and Element. For more information about working around duplicate charges, see [Troubleshooting Credit Cards and Element](#).

To accept a credit card payment in order entry without saving card information:

1. From an open sales order, use the **Totals** hot key to display the Totals screen for the order.
2. In the **CrCard Recvd** field, enter the amount of the payment the customer wants to charge to their card. The Credit Card Authorization screen displays.
3. Do one of the following:

To...	Do this...
charge a credit card the customer has on file	Select a card from the list that displays. To display the available cards, select Transaction > List Cards . Default cards that are saved for the customer display in this list. For more information, see Defining Default Credit Cards with Element Payment Services .

To...	Do this...
charge a new credit card that the customer has with them, without saving the card information	<ol style="list-style-type: none"> 1. Select New if a list of available cards displays. The card holder, zip code, and billing street address defaults to the bill-to address on the order. If the ship-to and bill-to are different, the system prompts you to select the address to use. Update the address information for the card, if necessary 2. Use the Sale hot key and do one of the following: <ul style="list-style-type: none"> • Select Swipe. The system displays the Element Process Transaction window in your default web browser. Run the card through your card reader. The system gathers the card information, including the CCV code from the back of the card. • Select Key Enter to manually enter the card information in the fields provided in the Element Process Transaction web page, which displays using your default web browser. For example, if the card's magnetic strip is worn. If you select to manually enter the card information, you are prompted to enter CVV ID. The CVV ID is required if the Require CVV ID On Keyed Element Credit Card Sales/Authorizations control maintenance record is set to Yes. • Card Number - The 16 digit card number from the front of the card. • Expiration Date - The month and year in which the card expires. • CVV - The three digit code, typically printed on the back of the card in the signature strip. 3. Click Process Transaction to submit the information and process the transaction with Element.

When the request completes, Element returns an authorization code for the transaction. The authorization code displays in the **Auth Code** field for reference. If the returned authorization code is *Call* or something similar, you need to call the credit card company for authorization. See Manually Entering Credit Card Authorizations.

If the authorization is approved, the payment is applied to the order. If the card fails to process or is declined, the system notifies the user taking the payment by displaying an error message in the Element Credit Card window, and also sends notification to the user set in the **Credit Card Administrator** control maintenance record, places the transaction in the Credit Card Payment Review Queue, and changes the print status of the order and changes the print status of the order based on the setting in the **Override Print Status On Credit Card Denial** control maintenance record. The decline is also noted in the order change log.

Saving Credit Cards on Orders for Future Payments

Your company might decide to keep credit card information on file for an order, thus creating a payment account with Element. For example, an inside salesperson enters an order that the customer would like to pay for with their credit card. However, your company does not charge the customer's card for an order until the material on the order has shipped. You can save the credit card information with the order to charge at a later date. For more information about payment accounts, see Element Payment Services and Your Credit Card Transactions.

You can also accept a payment for part of an order, and store the card to charge the remaining amount at a later date. For example, your counter salesperson take an order for one hundred 1/4 inch copper fittings. You have 50 in stock that you can send with the customer today. You can charge the customer's card for the 50 they are taking with them today, and then save the card information to the order to charge the remaining total due when you ship the remaining 50 fittings. For more information about taking a credit card payment for an order, see Accepting Credit Card Payments For Orders.

To save a credit card for a customer for future use on any order a customer places, set up default credit card information at the customer level.

When the product on the order is available and ready for shipping and the ship ticket prints, or when the Credit Card Authorization Phantom runs and finds that the order has shipped, the system processes the credit card payment.

To save a credit card to an order for future payments:

Note: If you are saving card information to charge for future payments on an order, you can save the information before or after you accept a payment for the order.

1. In the Totals screen of an order, use the **CCInfo** hot key and select **New** to display the Default Credit Card Information screen.

You can also select a card on file from the displayed list if the customer wants to charge the order to a credit card they have on file with you. Selecting a saved card saves the card information to the order.

2. Swipe the card through the card reader, or enter the information for the card in the fields provided.

1.

Field	Description
Card Number	Enter the 16 digit card number as it appears on the front of the card.
Card Holder	Enter the name exactly as it appears on the front of the credit card.
Expiration Date	Enter the month and year in which the card expires.
Zip Code and Street Address	The zip code and billing street address defaults to the bill-to address on the order. If the ship-to and bill-to are different, the system prompts you to select the address to use. Update the address information for the card, if necessary. This is used when you charge the card to complete an address verification with the credit card company.

Field	Description
Card Type	Select the two character code that identifies the brand name of the credit card, such as MC for Master Card. Valid credit card types are defined in the Valid Credit Card Types control maintenance record.
Auth Method	<p>Select one of the following authorization methods to use in order entry when the card is used for payment:</p> <ul style="list-style-type: none"> • Pre-Authorize Before Shipment - Sets money aside from the credit card, guaranteeing funds for the order total plus any freight charges, without charging the card. When the order is final, the system collects the final payment. Potential charges from your credit card processor may apply if you pre-authorize payment from a customer. • Authorize Before Shipment - Authorizes and charges the card for the order amount before shipping. The pick ticket is printed upon authorization. • Reference Only - Uses information in the Credit Card Authorization window for reference only at the order level. • Authorization After Review - Authorizes and charges the card for the order amount after the invoice is sent through batch printing and the shipping ticket is printed. <p>The authorization method for new cards defaults to the setting stored in the Default Auth Method for New Cards control maintenance record.</p>
Terms Override	Enter the code that represents the payment terms, if any, to use when this credit card is used for payment. For example, if you give the customer discount to orders when they pay in cash, but discounts do not apply when they pay with a credit card, enter the terms code to override the discount.
Charge Tax	Select this check box to apply tax to orders paid with this credit card. For example, customers could be exempt from tax if they pay with a company credit card. If you want to charge tax to payments made with such credit cards, select this option.
Reference Number	Enter a reference number for this customer, such as the order number or customer ID.
Card Verification Value ID	From the File menu, select Card Verification Value ID and enter the three digit CVV code from the back of the card.

2.

3. Do one of the following:

- Use the **Save to Customer** hot key to save the card to the customer record. This saves the card for use on future orders, not just this order.
- Close the screen and select **Yes** at the prompt to save the card to the order. This saves the card information for payments on this order only.

Defining Default Customer and Contact Credit Cards

Enter a customer's or contact's default credit card so the information is available when customers place orders. The setting on the **Validate Name In 'Ordered By' Field Against Customer Contact** control maintenance record determines whether the contact has authorization to place a credit order for the company.

You cannot add credit card information to a customer account set up as a branch cash account or to customer records that have the **Do NOT allow Credit Cards to be saved to this account** check box in the **Additional Info** tab in the Credit Control Parameters window checked.

Important: After you save a credit card, you cannot update the expiration date on the card. If the customer or contact's card expiration information changes, create a new card and save it to the customer or contact.

To define a default credit card information:

1. If you are defining default credit card information for a customer, do the following:
 - From the **Files** menu, select **Customer** to display the Customer Maintenance window, and enter the customer's name in the **Customer** field to display the record.
 - Use the **Credit** hot key to display the Credit Control Parameters window, and enter the credit parameters as needed.
 - Use the **Default Credit Card Info** hot key and select **New** to display the Default Credit Card Information screen. The address information defaults to what is entered for the customer.

If you are defining credit card information for a contact, do the following:

- From the **Files** menu, select **Contact** to display the Contact Maintenance window, and enter the contact's name in the **Contact** field to display the record.
 - Use the **Credit Card** hot key to display the Default Credit Card Information screen.
2. To enter the card information, do one of the following:

To...	Do this...
swipe the card to gather the card information	<ol style="list-style-type: none"> 1. Use the Swipe hot key to display the Element Card Information web page. 2. Slide the card through your encrypted card reader. 3. Click Save Card to gather the information and return to the Default Credit Card Information window. 4. Return to Eclipse and return to the Default Credit Card Information screen. <p>The system populates the last four digits of the card in the Card # field, as well as the Card Type, and Exp Date fields with the information from the card.</p>
enter the credit card information manually	<ol style="list-style-type: none"> 1. Use the Manual Entry hot key to display the Element Credit Card web page. 2. In the Card Number field, enter the entire card number exactly as it appears on the card. 3. In the Expiration field, enter the month and year in which the card expires. 4. Click Save Card to return to the Default Credit Card Information screen.

3. Edit the remaining credit card information in the Default Credit Card Information window for this card:

Field	Description
Cardholder	Enter the name of the card holder, as it is printed on the credit card.
Street Address	Enter the billing address for the card.
Zip Code	Enter the zip code of the billing address for the card.
Authorization Method	<p>Select one of the following authorization methods to use in order entry when the card is used for payment:</p> <ul style="list-style-type: none"> • Authorize Before Shipment - Sets money aside from the credit card, guaranteeing funds for the order total plus any freight charges, without charging the card. When the order is final, the system collects the final payment. Potential charges from your credit card processor may apply if you authorize payment from a customer. • Authorize Before Shipment - Authorizes and charges the card for the order amount before shipping. The pick ticket is printed upon authorization. • Reference Only - Uses information in the Credit Card Authorization window for reference only at the order level. • Authorization After Review - Authorizes and charges the card for the order amount after the invoice is sent through batch printing and the shipping ticket is printed. <p>The authorization method for new cards defaults to the setting stored in the Default Auth Method for New Cards control maintenance record.</p>
Terms Override	Enter the code that represents the payment terms, if any, to use when this credit card is used for payment. For example, if you give the customer discount to orders when they pay in cash, but discounts do not apply when they pay with a credit card, enter the terms code to override the discount.
Default Reference No	Select a default reference number for this customer. Reference numbers are defined in the Credit Card: Default Reference Number control maintenance record.
If Exemp Charge Tax	Enter Yes in this field to apply tax to orders paid with this credit card. for example, customers could be exempt from tax if they pay with a company credit card. If you want to charge tax to payments made with such a credit card, select this option.

4. Press **Esc** to save the credit card, exit the screen, and save the customer record.

If you swipe or manually enter a default credit card and do not save the customer record, the credit card is not saved.

More Options when Defining Default Credit Card Information

You can also do the following when defining default credit card information for a customer:

To...	Use this hot key...
include additional credit payment data about the customer. This information does not directly affect any other part of the system and is displayed for informational purposes only.	Add'l Info

To...	Use this hot key...
<p>delete default credit card information. For example, if a customer changes credit card companies, you can delete the credit card information from the system. The system also deletes the credit card information from Element Payment Services.</p> <p>When you delete the card, the system also deletes the associated payment account in Element. You cannot delete a card if there is an open order waiting for payment using the card.</p>	Delete

Manually Entering Credit Card Authorization Codes

In most circumstances, when you take a credit card payment for a sales order, the transaction with the credit card company happens behind the scenes with an automatic authorization, and you do not need to intervene in the process. However, at times, your system might be down, or there might be disputes with credit cards that require you to call the credit card companies directly and obtain an authorization code to process a payment. You can manually enter and process an authorization within order entry for an order. This process allows you to post the order payments to Eclipse, and to ensure that you receive the transaction money from the bank.

Enter credit card authorizations whenever you receive an authorization code over the phone from the card's issuing bank. If you receive an authorization code of "Call" or something similar when accepting a payment using a saved card, you need the full card number to initiate a manual authorization.

Note: You can only enter a manual credit card authorization for new cards, not cards that you have on file for a customer.

To manually enter a credit card authorization:

1. From an open sales order, use the **Totals** hot key to display the Totals screen for the order.
2. In the **CrCard Recvd** field, enter the amount of the payment the customer wants to charge to their card. The Credit Card Authorization screen displays.
3. Select **New** if a list of available cards displays, and enter the card holder, zip code, and billing street address for the card. If the system automatically selects a card, use the List hot key and select New.

Manual authorizations must always be processed enter the card number; stored cards cannot be manually authorized.

4. In the **Auth Code** field, enter the authorization number the credit card company provided you over the phone for the transaction.
5. Use the **Sale** hot key, answer **Yes** at the "Create A Manual Payment?" prompt, and do one of the following:

To...	Do this...
create a manual payment in Eclipse and to initiate the electronic payment collection process	<ol style="list-style-type: none"> 1. Answer Yes at the "Do you want Eclipse to Settle This Charge At the End of the Day?" prompt. Answer Yes at this prompt if you have not yet received your money from the bank for this credit card payment. For example, a sale transaction returns with a "call" response, which the user performs and obtains the authorization code over the phone. Or, your system is down and you choose to obtain your voice authorization and are now going back and entering transactions into Eclipse. 2. Continue with step 6 below.

To...	Do this...
<p>create a manual payment in Eclipse without collecting money</p>	<ol style="list-style-type: none"> 1. Answer No at the "Do you want Eclipse to Settle This Charge At the End of the Day?" prompt. Answer No at this prompt if you are entering the authorization code to enter the payment in Eclipse, and have already received the money for the transaction from the bank. For example, if there was a dispute with the card, you might have received your money, but now need to enter the payment information in Eclipse to close out the order and balance your books. 2. If you have already received your money from the bank, answer Yes at the next prompt to continue. If you have not received your money and need to start over, answer No and start again with step 4. If you answer Yes, the system applies the payment to the order and returns to the Totals screen. 3. Continue process the order as usual.

6. If you have not received money from the card issuing bank for the transaction, do one of the following to collect the card information:
 - Select **Swipe** to gather the card information by sliding the card through your card scanner. The system displays the Element Process Transaction window in your default web browser. Run the card through your card reader. The system gathers the card information, including the CCV code from the back of the card.
 - Select **Key Enter** to manually enter the card information in the fields provided in the Element Process Transaction web page, which displays using your default web browser. For example, if the card's magnetic strip is worn. If you select to manually enter the card information, you are prompted to enter CVV ID. The CVV ID is required if the Require CVV ID On Keyed Element Credit Card Sales/Authorizations control maintenance record is set to **Yes**.
 - **Card Number** - The 16 digit card number from the front of the card.
 - **Expiration Date** - The month and year in which the card expires.
 - **CVV** - The three digit code, typically printed on the back of the card in the signature strip.

Authorizing Credit Cards Overview (Formerly known as "pre-authorizing" credit cards)

You can authorize a credit card sale to ensure that the customer has enough credit available, but without actually charging the customer's account. Use authorizations when you need to take a credit card payment for material that you plan to ship at a later date, and need the credit card sale to include the freight charge for the order, that you might not know until the order is ready to ship. The actual charge to the card occurs when you ship the order to the customer.

Note: If you are accepting a credit card payment from a customer for an account balance, you must run that transaction as a sale transaction. You cannot authorize account payments for payment later. For more information, see Receiving Payments for Accounts in the Accounts Receivable documentation.

Accepting credit card payments in this manner involves the following activities:

- Entering and processing the initial authorization to hold the funds.

The order taker can enter the initial authorization, or the Automatic Shipping Ticket Phantom initiates the authorization, depending on your setting in the **Credit Card: Collection Approval Mode** control maintenance record. If the authorization method is **Authorize Only Before Shipment**, the system invoices any orders that have a status of Ship When Avail. If a credit card is attached to the order, and has an authorization method of **Sale Before Shipment**, the phantom triggers the communication with Element Payment Services to process the transaction and charge the customer's credit card. For more information, see Printing Shipping Tickets Automatically.

- Completing the authorization and actually charging the customer's card.

An order or payment taker can complete the authorization directly in order entry, or the system completes the authorization using a phantom process when the print status on the order reaches the status designated for shipment, or when the system receives a ship confirmation posting from Starship.

If the authorization method for the customer and card is set to **Authorize Before Shipment**, the Automatic Shipping Ticket Phantom performs the authorization and the completion is determined by the setting in the **Credit Card: Collection Approval Mode** control maintenance record. If the record is set to **F, Freight Posting**, the authorization completes when the system receives the ship confirmation from Starship. If the record is set to **C, Credit Card Authorization Phantom**, the authorization completes when the phantom runs and the transactions's print status matches those specified in the phantom driver screen.

Authorizing Credit Card Sales Amounts on Orders (Formerly known as "pre-authorizing" credit cards)

You can authorize a credit card sale to ensure that the customer has enough credit available, but without actually charging the customer's account. Use authorizations when you need to take a credit card payment for material that you plan to ship at a later date, and need the credit card sale to include the freight charge for the order, that you might not know until the order is ready to ship. The actual charge to the card occurs when you ship the order to the customer.

Note: The system uses the Element credentials for the price branch to process the authorization.

For more information, see [Authorizing Credit Cards Overview](#).

To initially authorize a credit card on an order:

1. From an open sales order, use the **Totals** hot key to the Totals screen for the order.
2. In the **CrCard** field, enter the amount of the payment the customer wants to charge to their card. The Credit Card Authorization screen displays.
3. Select an existing credit card, or select **New** to enter a new card. If you select **New**, manually enter the card information or swipe the card, as necessary.
4. Use the **Auth Only** hot key to pre-authorize the payment amount.

The system records the authorization amount and displays it in the **Total Auth** field on the order **Totals** screen. If the authorization is declined, the system sends a message to the user defined in the **Credit Card Administrator** control maintenance record at the payment branch, places an entry in the Credit Card Payment Review Queue, and changes the order's print status as indicated in the **Override Print Status On Credit Card Denial** control maintenance record.

Note: The **Disable Auth Only Option For Credit Card Authorizations** control maintenance record must be set to **No** for the **Auth Only** hot key to be available.

5. Save and process the order.

If an authorization fails, the system sends a notification to the user identified in the **Credit Card Administrator** control maintenance record, using the method defined in the **Notification Method When Credit Card Auth Fails**.

For information about completing the authorization process, see [Completing Credit Card Payment Authorizations](#).

Completing Credit Card Payment Authorizations (Authorizing is formerly known as "pre-authorizing")

The authorization completion is triggered in different ways depending on the setting in the **Credit Card Collection Approval Mode** control maintenance record.

- **Automatic Shipping Ticket Phantom** - When the authorization method is **Authorize Only Before Shipment**, and the print phantom selects a transaction to process that has a credit card attached to the order, the phantom triggers the communication with Element Payment Services to process the initial authorization and hold the funds against the customer's credit limit. For more information, see Printing Shipping Tickets Automatically.

Processing the order as a Pick-Up Now does not trigger the card handling event indicated by the selected authorization method.

- **Credit Card Authorization Phantom** - Use the Credit Card Authorization Phantom to select invoices on which to process payment. If open authorizations are found among the invoices, the phantom completes the initial authorization payment for the actual invoice amount. See the procedure below for more information.
- **Starship Shipment Confirmation** - When the system receives a shipment confirmation posting from Starship, the system triggers the communication with Element Payment Services to complete the transaction for the credit card payment.
- **Order Totals in Sales Order Entry** - Change the payment type to **Sale** in the actual sales order. See the procedure below for more information.

You can also use the Credit Card Payment Review Queue to review payments, authorization, declines, and failures. However, the review queue does not contain an Approve option. Address authorizations and declines in each individual transaction.

After the transaction processes and the credit card is charged, any additional monies set aside during the authorization are released. For example, the authorization amount is \$110.00, and the order total, with shipping charges, is \$107.75. The Credit Card Authorization Phantom collects \$107.75 and releases \$2.25 back to the credit limit.

Important: The system collects the balance on the order, regardless of the original authorized amount. Depending on the final total, there are potential implications based on some credit card company operating regulations that could change your interchange rate qualification and the risk that a transaction might be subject to a charge back. For more information about avoiding this scenario, see Authorized Credit Card Payment Example.

To use the Credit Card Authorization Phantom to complete a credit card payment authorization:

1. From the **A/R > Utilities** menu, select **Credit Card Authorization Phantom** to display the Credit Card Authorization Phantom screen.
2. In the **Br/Tr/All** field, enter the branch or territory from which you want the Phantom to select invoices. To include all branches or territories, type **All**.

3. In the **Print Stat** field, enter one of the following to select invoices with a particular print status:

Print Status Option	Description
P	Selects the invoice and includes it in the Detailed Invoice Preview report. This is a typical print status setting for an invoice.
Q	Selects the invoice and includes it in the Invoice Preview Queue, if that program is used before the Detailed invoice Preview report.
N	Assigns a "no print" status to the invoice.
B	Makes the invoice available to the Print Invoices program.
M	Places a flag on the manifest.

4. Use one of the following hot keys to run the Phantom and charge credit cards for the invoices that the system finds:
- **Begin** - To run the authorization immediately.
 - **Schedule** - To schedule the authorization to run at a later time.

To complete a credit card payment authorization in a sales order:

1. In the **Totals** screen of the sales order, use the **Pymnts** hot key, and select the authorized credit card payment.
2. Update the payment amount as necessary to include the proper freight amount.
3. Use the **Sale** hot key to complete the authorization.

Authorized Credit Card Payment Example

When the system goes to collect the money for an authorized credit card transaction, it attempts to collect the order's balance due amount, regardless of the original authorized amount. Depending on the final order total, there are potential implications that could change your interchange rate qualification and could result in you losing charge back protection if the customer disputes the charge. Consider the example below to help avoid charge backs and declines when processing credit card transactions.

The following settings and regulations apply to this example:

- The **Credit Card Collection Approval Mode** control maintenance record is set to **Freight Posting**.
- The VISA operating regulations provide a 15% tolerance in the completion amount from the initial authorization. Other credit card brands, or your merchant service provided may have differing rules for processing authorized transactions. This example deals specifically with VISA's tolerance rules.

Your counter salesperson enters an order and authorizes the customer's credit card For \$100. When Starship processes the order, the freight is calculated at \$30. The system attempts to collect the entire order total of \$130. The \$30 freight charge exceeds the VISA 15% tolerance regulation. In this case, any of the following could happen:

- The card's issuing bank might choose to decline the transaction.
- VISA re-categorizes the transaction to a higher interchange rate.
- If the customer disputes the charge, you are likely to lose the dispute because the initial authorization was not obtained for the extra \$30.

There are several ways to handle this scenario:

You Can...	More...
Add an upcharge to the ship via in Ship Via Maintenance	Adding a percent or minimum upcharge amount to the ship via includes the additional amount in the initial order authorization. If the ship via on the order in this example had a \$20 minimum upcharge amount, the initial authorization on the order would have been for \$120. The completion amount of \$130 would have been within the 15% tolerance, thus qualifying the transaction for optimal interchange rates and only charging the customer's card once.
Create another payment on the order for the \$30 freight charge	In Sales Order Entry, prior to the ship confirmation from Starship, complete the initial authorization for \$100, and create a separate payment on the order for the additional \$30 to cover the freight charges. This results in two charges on the customer's credit card statement: one for the \$100 for the order, one for \$30 for freight.
Complete a separate sale transaction	In Sales Order Entry, complete a sale transaction for the \$100 and allow the system to complete the authorization for \$30 when it receives the ship confirmation from Starship. This results in two charges on the customer's credit card statement: one for the \$100 for the order, one for \$30 for freight.
Let the initial authorization lapse	In Sales Order Entry, complete a separate sale transaction for \$130 to cover the entire amount of the order and let the initial authorization lapse. This holds the funds on the customer's card in addition to the original amount of the order.

Running the Credit Card Summary Report

Run a Credit Card Summary Report to list all the approved credit card transactions for a specific date range or batch number. Both voice-authorized and system-authorized credit card transactions display in this report. Use the totals on this report and compare them to the totals on the Cash Box Journal when run for credit card types. For more information, see Cash Box Journal.

To run a Credit Card Summary Report:

1. From the **A/R > Reports/Journals** menu, select **Credit Card Summary Report** to display the Credit Card Summary Report screen.
2. In the **Processor** field, press **F10** and select the processor that you use to settle your credit card transactions. You can run the report for Element, or other processors such as VITAL. The default is to run the report for all processors.
3. In the **Filter Br/Tr/All** field, enter the branch or territory to filter the merchant numbers available for that branch. Your selection here restricts the merchant numbers available to run the report for in the **Merchant Number** field.
4. In the **Merchant Number** field, enter the ID number of the merchant to run the report for a single merchant ID. To run the report for all merchants, select **All**. If you are using Element Payment Services, the merchant number is the Element acceptor ID.

Your processing firm assigns you a merchant number. You might have multiple merchant numbers if you have multiple branches or use more than one processing firm.

- If you entered a branch or territory, or combination of branches and territories in the **Filter Br/Tr/All** field you can only run the report for the merchants that are defined for the specified branches and territories.
 - If you specify a merchant number and that merchant number is also used by a branch that you did not select, any orders for that merchant number at that branch are included in the report, even though you did not select that branch in the **Filter Br/Tr/All** field.
5. In the **Report Br/Tr/All** field, enter the branch, branches, or territories for which you want to run the report.
 6. In the **Start Date** and **End Date** fields, enter the first and last date of the period you want to include in the report.
 7. In the **Batch Number** field, enter the batch number assigned in the End of Day Settlement Report for VITAL and TSYS, or the batch number provided by Element Payment Services.
 8. In the **Sort by** field, select how you want to sort the contents of the report, for example, by manual or automatic authorization.
 9. In the **Select by Date** field, if you have changed the payment date on a credit card transaction, select one of the following to determine which date to run the report by:
 - **Cash Box** - Uses the override date.
 - **Authorized** - Uses the original authorization date.
 10. Set options, if needed, and run the report.

What the Report Shows

The Credit Card Summary Report provides the following information:

Column	Description
Order #	The sales order number to which the credit card payment applies.
Br	The branch where the sales order was take and the credit card transaction initiated.
Type	The credit card company, such as VI for Visa and MC for Master Card.
Tran Amount	The dollar amount <i>requested</i> for payment. Compare the total of this column with the total of the CCard column for reconciliation purposes on the Cash Box Journal Report.
Collect Amount	The dollar amount the collect. The amount in this column should match the amount in the Tran Amount column, except for pre-authorizations, as pre-authorizations are not actual payments.
Auth Amount	The authorization method for the transaction, for example, if ti was an automatic authorization, or a voice authorization that was entered manually.
Tran Dt	The date the transaction occurred.
Collect Dt	The date when funds were collected from the bank for the transaction.
Batch #	The number assigned to the group of transactions in which this transaction was processed. The system assigns a batch number when you run the Credit Card End of Day Settlement Report.
Settle Dt	The date when the settlement occurred. The settled date does not display if you ran the report for only the Element processor. Use the Transaction ID to identify the transaction instead.
Settle Info	Any information relative to the settlement of the transaction, for example, whether the card was accepted or declined. The settle information does not display if you ran the report for only the Element processor. Use the Transaction ID to identify the transaction instead.
Transaction ID	If you use Element Payment Services, the report includes the Element transaction ID instead of a settlement date and settlement information. The transaction ID, identifies the transaction to you within the Element system.
Merchant #	The merchant ID number that the processing firm assigned to you, and that the transaction was processed under. If you are using Element Payment Services, this is your Acceptor ID.
Processor	The processor used for the transaction, such as Element or Vital.

Reviewing and Processing Failed and Declined Credit Card Charges

Use the Credit Card Payment Review Queue to view all failed, declined, and authorized credit card charges. The system places any transactions that failed due to communication-type errors or were declined due to a problem with the card in this queue for your review.

Use the information in this queue to help you with re-charges for failed or declined transactions, or to call the customer to get a different credit card number. For information about using the queue to process authorized orders, see Processing Credit Card Payments on Authorized Orders.

Use the information in the queue to help research why transactions failed or declined. For some declines, you might need to contact the customer for new or updated card information to reprocess the transaction.

To review and process failed and declined credit card charges:

1. From the **A/R** menu, select **Credit Card Payment Review Queue** to display the Credit Card Payment Review Queue screen.
2. In the **Br/Tr/All** field, enter the branch, branches, or territories for which you want review credit card transactions.
3. In the **Select Items** field, select **Failed** to review only those transactions that failed due to a communication error, or **Declined** to view only the transactions where payment was declined on the entered and press **Enter**.
4. Review the information about why the transaction failed or was declined by selecting the transaction and using the **Auth Message** hot key.

For example, you might find that a transaction failed due to a communication error, or was declined because the card is expired. Having this information helps you make decisions about the actions to take regarding the transaction.

5. Do one of the following to approve or remove transactions in the queue:

To...	Do this...
enter new or update card information, such as updating the expiration date entered for the card	Select the transaction and use the Edit hot key to display the sales order. Go to the Totals screen and enter the updated card information. You must have the SOE.OPEN.ORDER.EDIT and the SOE.ALLOWED authorization keys assigned to edit an open sales order.
to reprocess selected transactions	Enter Y in the first column for the transaction that you want to reprocess, and use the Approve hot key to process a single transaction or the Approve Flagged hot key to process all the transactions with a Y in the first column.
approve all declined transactions	Use the Approve Declined hot key to reprocess all transactions with a status of Declined . Use this option if you have researched the declines and updated the credit card information as necessary for all the cards in the queue.

To...	Do this...
delete transactions from the queue	<p>Select the transaction you want to remove from the queue and use the Delete hot key.</p> <p>Credit card payments are not processed for transactions that you remove from the queue. Remove an item from the queue if the payment was processed using a different method, such as by cash or check or you have settled the credit card payment and do not need to reprocess the transaction.</p>
delete all transactions from the queue	<p>Use the Delete All hot key.</p> <p>Credit card payments are not processed for transactions that you remove from the queue. For example, use this option if you are reviewing Failed transactions that you have settled and do not need to reprocess.</p>

Applying Credits to Credit Cards for Returns

When a customer paid for an order using a credit card, credit any refunds or returns back to the same card. A returned product is linked to its original sales order, therefore, the original card information is used as the default credit card for the return order. However, you might encounter the following scenarios:

- If you do not have the original sales order number, create a new sales order to process the return.
- If you have the original sales order number with the credit card information, enter the return quantity on the original order, and credit the card used to pay for the original order.

The settings in the **Sales Order Entry Return Setup** control maintenance record determine how returns to credit cards are handled in order entry. If the **Require Same Credit Card on Return** option in the record is set to **Yes**, the amount of returned items are applied to the same credit card they were originally ordered with. If the **Require Original Invoice When Adding Return Item To Order** option in the record is set to **Yes**, you must have the original sales order number to credit the card for the return.

Note: The system uses the Element credentials (acceptor ID for the branch, etc) that were used on the original order, regardless of the branch where the return is being processed. However, if the card on the original order is now expired, the system deletes that card from the return order.

To return a product in Sales Order Entry, see Returning Product from Sales Order Entry in the Sales Management documentation.

To apply a credit to the credit card for a return:

1. From the **Orders** menu, select **Sales Order Entry** to display the Sales Order Entry screen and create a return order.

In the Return Goods Verification window, if you have the original order number, enter it to verify that the products were purchased. When you return to the Body of the order, the negative quantities are entered for you.

2. Use the **Totals** hot key and enter the refund as a negative amount in the **CrCard Recvd** field.
3. In the Credit Card Authorization screen, do one of the following:

If...	Then...
You entered the return quantity on the original sales order	<ol style="list-style-type: none"> 1. Verify that the information in the Credit Card Authorization screen is correct for the card to which you want to refund the charge. The system displays the card information for the card used to purchase the items. 2. Use the Sale hot key to credit the card.

If...	Then...
<p>You did not have the original order number, and created a new order to process the return</p>	<ol style="list-style-type: none"> 1. Either select New to credit a card that you do not have or select a card that the customer has on file. 2. Enter the card holder, zip code, and billing street address for the card. 3. Use the Sale hot key and do one of the following: <ul style="list-style-type: none"> • Select Swipe. The system displays the Element Process Transaction window in your default web browser. Run the card through your card reader. The system gathers the card information, including the CCV code from the back of the card. • Select Key Enter to manually enter the card information in the fields provided in the Element Process Transaction web page, which displays using your default web browser. For example, if the card's magnetic strip is worn. If you select to manually enter the card information, you are prompted to enter CVV ID. The CVV ID is required if the Require CVV ID On Keyed Element Credit Card Sales/Authorizations control maintenance record is set to Yes. • Card Number - The 16 digit card number from the front of the card. • Expiration Date - The month and year in which the card expires. • CVV - The three digit code, typically printed on the back of the card in the signature strip. 4. Click Process Transaction to submit the information and process the transaction with Element.

4. When the request completes, Element returns an authorization code for the transaction. The authorization code displays in the **Auth Code** field for reference. If the returned authorization code is *Call* or something similar, you need to call the credit card company for authorization. See [Manually Entering Credit Card Authorizations](#).

Voiding Credit Card Transactions

If a customer makes a change to an order, or for any other reason, you can void a credit card transaction. Void the original credit card transaction before attempting to accept a different payment.

Note: The system uses the Element credentials for the price branch to process the void.

If the charge transaction has already been settled, you must refund the amount instead of voiding the transaction.

To void a credit card transaction:

1. In the Totals tab of the order, click **Change Payment** and select the payment you want to void.
2. Verify that the information in the window for the transaction is correct.
3. From the **Transaction** menu, select **Void** to void the sale.

The Void menu option is only available if the sale amount has not been settled. If it is too late to void a transaction, process a refund instead.

Managing Element Payments Accounts Overview

As you save credit card information either to a customer, contact, or an order, the system creates Payment Account Secure Storage (PASS) accounts, also known as payment accounts, with Element Payment Services. Your contract terms with Element indicate the charges you pay for the number of payment accounts you maintain.

To reduce your costs for storing credit card information, we recommend that you review your payment accounts *once a month* and delete the accounts you no longer need. For example, consider deleting payment accounts for cards that have expired, for customers or contacts who have credit card information on file but have not done business with you in six months (or less), and for credit card transactions for orders that were placed using a miscellaneous cash customer record, such as for walk-ins to your counter.

Using the PASS Account Utility, you can schedule to delete payment accounts that meet a certain set of criteria, or you can view and delete payment accounts manually. When you delete an account, the system deletes the information from Element and from Eclipse. For example, if you delete a payment account for credit card information stored at the customer-level, the system deletes the payment account from Element and removes the saved credit card from the customer record.

As you are processing transactions or entering credit card information for a customer or contact and the power goes out, the internet goes down, or for some other reason the payment account for the information you entered is not created, there is credit card information in Eclipse that does not have a matching payment account in Element, rendering it useless. In these circumstances, an overnight routine removes the credit card information from Eclipse. However, if the system finds a payment account in Element that does not have matching information in Eclipse, the system creates the information in Eclipse using the saved data in Element.

Viewing and Manually Deleting Element Payment Accounts

Using the PASS Account Utility, you can view and delete payment accounts manually. We recommend that you review your payment accounts at least once a month to ensure that you are being billed for only the payment accounts that you need. You can also schedule a phantom process to delete the accounts that meet your selection criteria on a regular basis. For more information about scheduling account deletions, see [Scheduling Element Payment Account Deletions](#).

Use the selection criteria in the PASS Account Utility to control the performance of the search return time. For example, limit the date range of expiration dates or search for one card type at a time.

Important: When you delete a payment account, the system deletes the information from Element and from Eclipse. You must enter that credit card information again in Eclipse to use the card.

The system cannot delete a payment account if there is an open order waiting to use the credit card associated with that account as payment.

For more information about why it is important to manage your Element Payment Accounts, see [Managing Element Payments Accounts Overview](#).

To view and delete an Element Payment Account:

1. From the **System > Custom > Add On Products > Credit Card** menu, select **Element PASS Account Utility** to display the PASS Account Utility screen.
2. Select the criteria you want to use to filter your payment accounts for deletion. You must specify a card brand, an expiration date range, or both.

Field	Description
Acceptor ID	<p>Much like a merchant number, Element assigns you unique acceptor IDs to identify you as an Element customer. Depending on your business relationship with Element, you might have a different acceptor ID for each branch, or you might have a single acceptor ID that encompasses more than one branch.</p> <p>Enter the acceptor ID for which you want to view and delete payment accounts. To enter more than one acceptor ID, use the Multi hot key.</p>
PASS Type	<p>(Optional) Select the type of payment account you want to view or delete:</p> <ul style="list-style-type: none"> • Customer - Includes payment accounts created for credit cards that you entered as default cards for a customer. • Contact - Includes payment accounts created for credit cards that you entered as default cards for a contact. • Open Order - Includes payment accounts for credit cards that you added and saved to an order that still has an open balance or an open generation. • Closed Order - Includes payment accounts for credit cards that you added and saved to an order that has a balance of \$0.00 no open balance or any open generations. <p>For example, if you want to delete all your payment accounts for a particular customer, select Customer to help narrow the list. If you want to delete payment accounts for all orders that you placed under a miscellaneous cash customer, select Closed Order.</p>

Field	Description
Card Brand	<p>Select the card type, such as Visa or MasterCard, to narrow the list of payment accounts to only those associated with that card type. For example, if you decide that you are no longer going to accept American Express, select that card type to view and delete only the payment accounts associated with American Express cards.</p> <p>You must specify a card brand, an expiration date, or both.</p>
Expire Begin	<p>Enter the first date in a range of dates to view only payment accounts that contain cards that expire in or after that month.</p> <p>The day of the month is provided here for variable dating purposes, however, the system ignores the day you enter, as credit cards expire on the last day of the month listed as the expiration date on the card.</p> <p>The year 2101 and 2001 both end in 01, thus they look like the same year. To get accurate results when searching for payment accounts, the expire begin date should not be prior to 1980, and the expire end date should not be after 2080. You cannot query for a date range greater than or equal to 100 years.</p> <p>If you leave this field blank, the system starts its search for cards expiring in January 2000.</p>
Expire End	<p>Enter the last date in a range of dates to view only payment accounts that contain cards that expire in or before that month.</p> <p>The day of the month is provided here for variable dating purposes, however, the system ignores the day you enter, as credit cards expire on the last day of the month listed as the expiration date on the card.</p> <p>The year 2101 and 2001 both end in 01, thus they look like the same year. To get accurate results when searching for payment accounts, the expire begin date should not be prior to 1980, and the end date should not be after 2080. You cannot query for a date range greater than or equal to 100 years.</p> <p>If you leave this field blank, the system ends its search in December of the current year plus 11 years. For example, 2010+11 = December 2021.</p>
Last Activity Over __ Days Ago	<p>Enter a time period to view or delete only those payment accounts with cards that have been charged since that time. For example, if you want to view and delete cards that have not had activity for over three months, enter 90 in this field.</p> <hr/> <p>If you enter a last activity date and schedule a phantom process to complete your deletions, the system deletes cards you might have entered but not yet charged.</p> <hr/> <p>Your search time can increase if you choose to search using a last activity date.</p>

- Use the **View** hot key to display the Element Payment Account Management screen..

The screen lists the view-only payment account information for the accounts that meet the criteria you entered. Use the **Sort By** hot key to sort the list, as necessary.

Field	Description
PASS Type	The type of transaction or entity to which the payment account is connected: <ul style="list-style-type: none"> • Customer - Payment accounts created for credit cards that you entered as default cards for a customer. • Contact - Payment accounts created for credit cards that you entered as default cards for a contact. • Open Order - Payment accounts for credit cards that you added and saved to an order that still has an open balance or an open generation. • Closed Order - Payment accounts for credit cards that you added and saved to an order that has no open balance or any open generations. If this field is blank, there is credit card information in Eclipse that does not have a matching payment account in Element, rendering it useless. You can choose to delete these accounts manually, or, the system deletes them the next time the overnight routines run.
Card #	The last 4 digit of the credit card number. For example, use this information if you want to contact the customer about a card that has or is going to expire.
Expire	The date the credit card expires.
Name	The customer or contact to whom the card belongs. If the card is saved only to an order, this field displays the order number.
Last Used	The date the card was last used to pay for an order. If you did not specify a last activity date in the PASS Account Utility screen, the Last Used column is blank. If you do specify a last activity date, the Last Used column is blank if the card exists in the system but has not been used to process any payments.

4. Select an account and use the **Detail** hot key to display the following additional information regarding the payment account:

Field	Description
Reference Number	A number that is assigned to the payment account to reference it in Eclipse and tie it to the account in Element.
Card Brand	The card type, such as Visa or MasterCard.
PASS GUID	The payment account number as generated by Element. This number is provided for troubleshooting purposes.

5. Use the **Edit** hot key to display the customer, contact, or order associated with the payment account.

6. To delete a payment account, do one of the following:

To...	Do this...
Delete a single payment account	Select the account and use the Delete hot key.
Delete all the payment accounts in the view	Use the Delete All hot key. All payment accounts that matched your initial criteria and that are available in the view are deleted.

Scheduling Element Payment Account Deletions

Using the PASS Account Utility, you can schedule a phantom process to delete payment accounts that meet a set of criteria. We recommend that you delete unnecessary payment accounts at least once a month to ensure that you are being billed for only the payment accounts that you need. For more information about why it is important to manage your Element Payment Accounts, see [Managing Element Payments Accounts Overview](#).

Important: When you delete a payment account, the system deletes the information from Element and from Eclipse. You need to enter that credit card information again in Eclipse to use the card.

Using the selection criteria, you determine the payment accounts that are deleted on a scheduled basis. For example, a couple of days before Element generates your bill, you might want to delete all payment accounts that were created for cards saved to orders that no longer have a balance due or any open generations. Set your search criteria to include **Closed Order** PASS Types and a particular card brand. You can schedule multiple phantom processes to capture deletions for each card branch. Scheduling these deletion types ensures that open orders retain their information, as you still need those payment accounts.

To schedule payment accounts to be deleted:

1. From the **System > Custom > Add On Products > Credit Card** menu, select **Element PASS Account Utility** to display the PASS Account Utility screen.
2. Enter the criteria that you want to use to select the payment accounts to delete. For more information about the selection criteria, see [Viewing and Deleting Element Payment Accounts](#).
3. Use the **Schedule Delete All** hot key to display the Phantom Scheduler screen.
4. Schedule the PASS account deletions, as necessary. The date fields accept variable dating. For more information about scheduling a phantom process, see [Scheduling Phantom Processes in the System Maintenance documentation](#).
5. Press **Esc** to save your settings and return to the Element Pass Account Utility window.

Converting to the Element Payment Services Solution Overview

Prior to processing credit card payments using the Element Payment Services solution, complete the following conversion activities so your data is set up correctly:

1. Upgrade to Release 8.6.8 or later of the Eclipse software.
2. Establish your agreement with Element and receive your credentials with them.
3. The night prior to your specified Element conversion date, which you have coordinated with Epicor Eclipse and Element, complete the following:
 - Complete all your in-process transactions in Eclipse and settle transactions with your old credit card solution. This includes any transaction that is a "pre-authorized" state.

If you do not complete the sales for pre-authorized transactions and run the conversion, you need to let the authorization expire and enter the credit card transaction again. "Pre-authorized" transactions that are not complete are not included in the conversion.
 - Run the contact and customer conversion utility to convert your Eclipse customer and contact credit card information into tokens and to create the appropriate payment accounts in the Element database. For more information, see *Running the Credit Card Data Conversion*.
 - Run the transaction conversion utility to convert credit card information on orders into tokens and to create the appropriate accounts in the Element database.
 - Run the Element Credit Card Purge Utility to strip all but the last four digits of any card number that was not converted to an Element account. This includes card numbers in log and activity files.
4. Replace your old swipe devices with the new encrypted swipe devices.
5. Verify your credit card control maintenance record settings.
6. Verify that your processor and range are setup for use with Element.
7. Inform Activant Solutions that you are no longer using the Eclipse-TSYS solution to begin the discontinuation process.

Converting Customer and Contact Data for Element

The weekend of your specified conversion date, you must run the contact and customer conversion utility to convert the historic credit card data in your customer and contact records system to create tokens and to create any necessary payment accounts for stored cards.

When you run the conversion, the system creates a payment account in the Element database for each credit card it finds in a contact or customer record. We strongly recommend that you review the created accounts using the PASS Account Utility to verify that all the created accounts are required prior to your first Element billing cycle. Because the system is converting all saved cards, you might find that you have payment accounts for customer and contacts you no longer do business with, or expired cards that are no longer valid.

You can run the customer and contact conversion more than once if you receive errors during the first run. If a PASS account has been created for a card, it does not get created a second time.

Note: The conversion process does not convert any credit card information that exists within your Hold file entries. To delete this information, delete the file and regenerate it after the conversion.

To run the convert customer and contact data for Element:

1. Ensure that you have completed the necessary steps listed in *Converting to the Element Payment Services Solution Overview*.
2. Log in to the character-based system. The conversion utility is run only at the time you are converting from your old credit card system to Element, and exists only in the character-based interface.
3. From the **System > System Files > Custom > Credit Card Setup** menu, select **Element Contact and Customer Conversion** to display the Convert CC to Element screen.
4. Select one of the following to convert your credit card information:
 - **Begin** - Use this hot key to start the conversion process immediately.
 - **Schedule** - Use this hot key to schedule your conversion process to run at a later time.
5. View the report that the system places in your Hold file to verify the results of the conversion.

Converting Transactions for Element

The weekend of your specified conversion date, you must run the transaction conversion utility to convert the credit card data in your transactions system to create tokens and to create any necessary payment accounts for stored cards.

When you run the conversion, the system creates a payment account in the Element database for each credit card that is stored on an order in the CC Info screen. We strongly recommend that you review the created accounts using the PASS Account Utility to verify that all the created accounts are required prior to your first Element billing cycle. Because the system is converting all saved cards, you might find that you have payment accounts for expired cards that are no longer valid.

Note: The conversion process does not convert any credit card information that exists within your Hold file entries. To delete this information, delete the file and regenerate it after the conversion.

You can run the transaction conversion more than once if you receive errors during the first run.

Important: Run the transaction conversion after hours *after* you have run the customer and contact conversion. After the conversion is complete, and credit card listed in the CC Info screen can *only* be processed using Element.

To convert transactions for Element:

1. Ensure that you have completed the necessary steps listed in *Converting to the Element Payment Services Solution Overview*.
2. Log in to the character-based system. The conversion utility is run only at the time you are converting from your old credit card system to Element, and exists only in the character-based interface.
3. From the **System > System Files > Custom > Credit Card Setup** menu, select **Element Transaction Conversion** to display the Convert Transactions to Element screen.
4. In the **Convert order closed ____ days in the past** field, enter the number days in the past the system should convert orders.

The transaction conversion converts any closed order that has been settled in the last number of days that you enter here. Use this field to help manage credits for orders that are still within your return order policy. If a card is not converted to Element for a closed order, you have to gather the credit card information from the customer again to manually create a new Element payment account to issue a credit for the return.

5. Select one of the following to convert your credit card information:
 - **Begin** - Use this hot key to start the conversion process immediately.
 - **Schedule** - Use this hot key to schedule your conversion process to run at a later time.
6. View the report that the system places in your Hold file to verify the results of the conversion.

Fix any errors that might have occurred, for example, invalid card numbers, and run the conversion again.

Purging Unconverted Credit Card Data for Element

After you run the customer and contact conversion and the transaction conversion, there may be credit cards that were not converted to Element PASS accounts. To be compliant with the credit card rules, all credit card numbers left over in the system, for example in change logs and customer, contact, or orders cards that did not get converted, only the last four digits of the card number can be visible or stored in the system.

Use the Element Credit Card Purge utility to trim all credit card numbers that remain in the system to display and store only the last 4 digits of the card's number.

Note: The purge process does not convert any credit card information that exists within your Hold file entries. To delete this information, delete the file and regenerate it after the conversion.

Important: Run the purge utility after you have completed all other Element conversion activities.

To purge any unconverted credit card data for Element:

1. Ensure that you have completed the necessary steps listed in *Converting to the Element Payment Services Solution Overview*.
2. Log out and back into the character-based system after completing the transaction conversion.
3. From the **System > System Files > Custom > Credit Card Setup** menu, select Element **Credit Card Purge** to display the Convert CC to Element screen.
4. Select one of the following to purge your credit card information:
 - **Begin** - Use this hot key to start the purge process immediately.
 - **Schedule** - Use this hot key to schedule the purge process to run at a run at a later time.

Troubleshooting Credit Cards and Element

Use the following sections to help troubleshoot issues when processing payments using credit cards.

Transaction Not Found Message

If you are manually entering or swiping a card in the Element Process Transaction window in a sales order, and you click **Cancel Transaction** without completing the transaction, the system displays a Transaction Not Found message when you return to sales order entry. This message indicates that the system was not able to retrieve a response for the transaction from Element because you clicked **Cancel Transaction**, and a similar message displays in the order's change log. If you receive this message, attempt using a different card or accepting a different payment type.

Duplicate Decline Message

Element contains logic that checks for duplicate charges. If two charges for the same amount are made to the same card during the same batch period, the second charge is declined. You receive an error message that indicates a duplicate decline. You might also receive this message if a charge was sent to Element, and you lost internet connectivity before Eclipse received a response, and you attempt to charge the card again.

Research transactions that come back with a duplicate decline message to ensure they are legitimate business transactions. If they are legitimate and you would like to charge the card, do one of the following:

- Change the price for the product on the order by one cent (\$.01) so the order total is different, and charge the card for the new amount.
- Hold the order until the following day, or until after your batch with Element processes, and process the order again to charge the card.

If Element received a transaction but Eclipse did not receive a response, Element has the information it needs to charge the card. However, because there is no indication in Eclipse that the order has been paid, you might attempt to charge the card again and receive the duplicate decline error. In this case, manually enter the payment information on the order to capture the charged payment so the order continues to process through the system.

Internet Explorer 8.0

If you are experiencing problems running Internet Explorer 8.0, refer to the fixes in the Microsoft Support Knowledge base article located at <http://support.microsoft.com/kb/929867>, or the steps below to fix the problem on each computer that you use to enter credit card payment information.

Important: If you are running Internet Explorer 8.0 on Windows 7.0 or Windows Vista, the troubleshooting steps provided below do not apply. To correct the problem, leave an Internet Explorer 8.0 browser window open while you are entering orders and accepting payments using credit cards in Eclipse. Or, set Mozilla Firefox as your default browser. Running Firefox does not require that you leave a browser window open.

1. Double-click **My Computer** or display your Windows Explorer.
2. From the **Tools** menu, select Options.
3. Click the **File Types** tab.

4. Scroll down to and highlight **(NONE) URL: HyperText Transfer Protocol**
5. Click **Advanced**.
6. Highlight the open action (should be the only one you have) and click **Edit**.
7. Click **OK** to close the window.
8. Click **OK** again to close the next window and then click **Close** to close the last window.

It may seem like nothing has changed by doing these steps since you did not actually change anything. However, you should now find that Internet Explorer 8 launches correctly from Eterm. If these steps do not resolve your Internet Explorer issues, you can follow all the steps in the article which double checks the information in the necessary fields.

404 Page Not Found Errors

If you receive a 404 Page Not Found error when trying to enter a credit card payment on an order, your system has lost the internet connection with Element. Verify that your internet connection is still online.