

Using Credit Cards with CLIP

Before going through these instructions to setup your credit cards in CLIPxe be sure to contact your sales representative (sales@clip.com) with clip to help you get started with setting up your blue pay account.

If you have been processing credit cards in the past or want to now, you must follow these steps If you have credit card information already in CLIP

We are longer storing credit card numbers in CLIP you must convert your existing credit card information.

1. Go to www.clip.com – Updates – Utilities- Download
2. Select Credit Card List – Download Now
3. Select Save and put it someplace so you can find it.
4. Unzip the file to the inside of the CLIPv folder (You will need to know where this is if you are using a network)
5. Go to Files-Other Utilities-Dot Prompt
6. Type Do tmpcclist
7. Hit the enter key. This will export all customers that have credit card numbers out to excel and open the file. This will include any customer that has at least one credit card in their records. If they also have a bank account stored they will also show. Just look for the records that have an expiration date to identify the credit card ones
8. In CLIP Hit Escape key
9. In CLIP go to System-Financial Setups- Credit Card Setup – Credit Card Setup
10. Select the BluePay radio button
11. Select the BluePay Setup button
12. Log into the BluePay website with the information provided by them
13. On their webpage go to Administration-Accounts-List
14. Select the View icon under the Options column (face with eyes)
15. Write down the Account ID and Secret Key. You can also use the Copy and Paste commands to make this much easier.
16. Enter the information into CLIP
17. Select Save
18. Select Return - Return
19. In CLIP go to the first customer on the excel list- Financials – Bank
20. Select the + icon next to the existing credit card number
21. Select Process
22. Select Ok to the confirmation message
23. Done. Go to next credit card number and start from step 18 until all credit card numbers for all customers are converted.

To process a credit card.

In Enter Transactions press the Y or + key in the Charge Card field

Operator: GLENNZ Find Customer

Customer # 50
Property Name: ZIOR, GLENN
Property Address: 808 Festival Ave Mount Airy
Billing Address: 808 Festival Ave Mount Airy, MD

Find Customer Find Invoice Find P.O. # Check Reader Assign New Return

Continue

Enter Transaction Information

# Name Code		

Date: 06/16/10 Credit: 1200 Debit: 1100
Code: C=Cash/Credit Charge Card? N
Amount: 1.00 Descr:
Accounts Receivable
Damascus Community Bank
Edit Credit/Debit Codes

Save Revert Get Transaction Amount From -6.78 Last Billing History ...

If the customer has a credit card on file, the main credit card is selected in the pull down list.

Process Credit Card Charge

Process the Charge

Credit Card Number XXXXXXXXXXXXXXX4642 Return

Expiration Date 10/12
Name on Card GLENN
Card Description MY CREDIT CARDSVLV'ALIKVMVMV#
CID

Voice Authorization
Code Date /

Continue

To add a new credit card select "Other" from the pull down.

BluePay Customer Details

Return

Customer #: 50

Customer Name: ZIOR, GLENN

Address: 808 Festival Ave

City: Mount Airy

State: MD

Zip: 217545

Card Type: VISA

Name on Card:

Credit Card #: - - -

CVV2:

Card Expiration Date: (MMYY)

Description:

Process

Save Transaction as normal

Post as normal

CLIP will send out all credit cards out for processing. If a credit card is declined you will be prompted to print out the exception report.

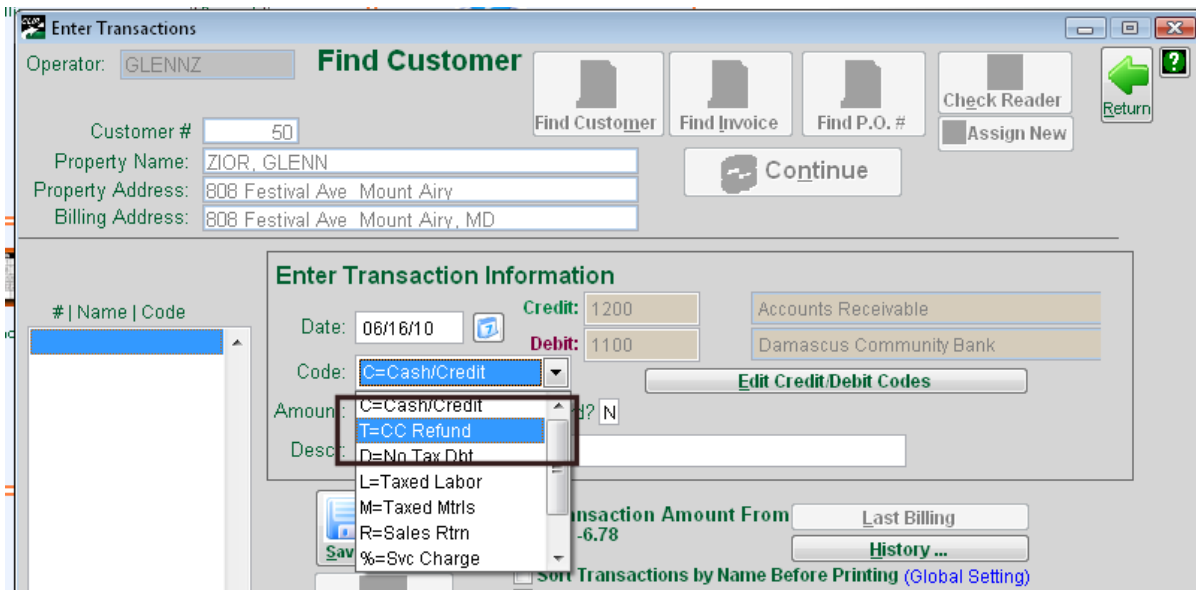
CLIP

Print Credit Card Exception Report?

Yes No

Any declined cards will not be posted and is erased from Enter Transactions. You will need to reenter these after the declined issue is resolved.

To process a refund to a customer select the Code of "T=CC Refund". Do NOT use a negative number. CLIP knows it is a refund.



Reports

Reports can be directly run from the BluePay website