



AppointmentQuest
Online Appointment Scheduler

Users Guide

Supplemental
Payment Processing

Revision 2.0
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Introduction

Advanced credit card processing capabilities of AppointmentQuest Online Appointment Scheduler allow you to collect service fees (or take security deposits) from your customers when they make appointments, as well as take care of rescheduling and cancellation charges automatically - all through our secure servers.

- **Offline Payments.** Offline credit card payment processing allows you to capture and store customer credit cards into your online customer database in AppointmentQuest Online Appointment Scheduler, along with transaction records that you can process offline via existing credit card terminal.
- **Online Payments.** To take advantage of the real-time credit verification and automatic transaction processing you will need an account with a payment gateway vendor, such as PayPal Payflow PRO or Authorize.Net Payment Services. AppointmentQuest Online Appointment Scheduler features seamless integration with payment processors, allowing for secure online processing of authorizations, captures and credits directly to your merchant account.

AppointmentQuest recommends you to use “online payments” option, as it provides you with real-time customer credit card verification. This guide explains how to configure your AppointmentQuest account for processing customer payments in online mode. If you are planning to use offline payment processing, skip chapters related to merchant accounts.

In order to begin accepting credit card payments from your customers in AppointmentQuest Online Appointment Scheduler, you need to complete the following steps:

1. Get a merchant account from your bank.
2. Get an account with the payment gateway vendor of your choice (PayPal or Authorize.Net).
3. Enter the gateway processor account information into Online Appointment Scheduler.
4. Setup appointment registration, rescheduling and cancellation fees on your schedules.
5. Test everything.
6. Go live.

IMPORTANT: PayPal Payflow PRO payment gateway is formerly known as VeriSign Payflow PRO, as it may be referenced elsewhere in this document. On November 18, 2005, PayPal acquired VeriSign’s Payment Services business and changed the name of the product as the result of the acquisition. Former VeriSign Payflow PRO accounts are compatible with the PayPal Payflow PRO payment gateway and are fully supported by AppointmentQuest payment processing.

Payment Processing: How it Works

This chapter provides an overview of how online payment processing works. Payment processing for AppointmentQuest Online Appointment Scheduler takes place in two phases: **authorization** (getting approval for the transaction that is stored with the appointment, or standalone transaction) and **settlement** (processing the transaction which transfers funds from the customer's credit card account to your merchant's account). Authorization and settlement phases may be linked together in your payment configuration to enable immediate payment processing.

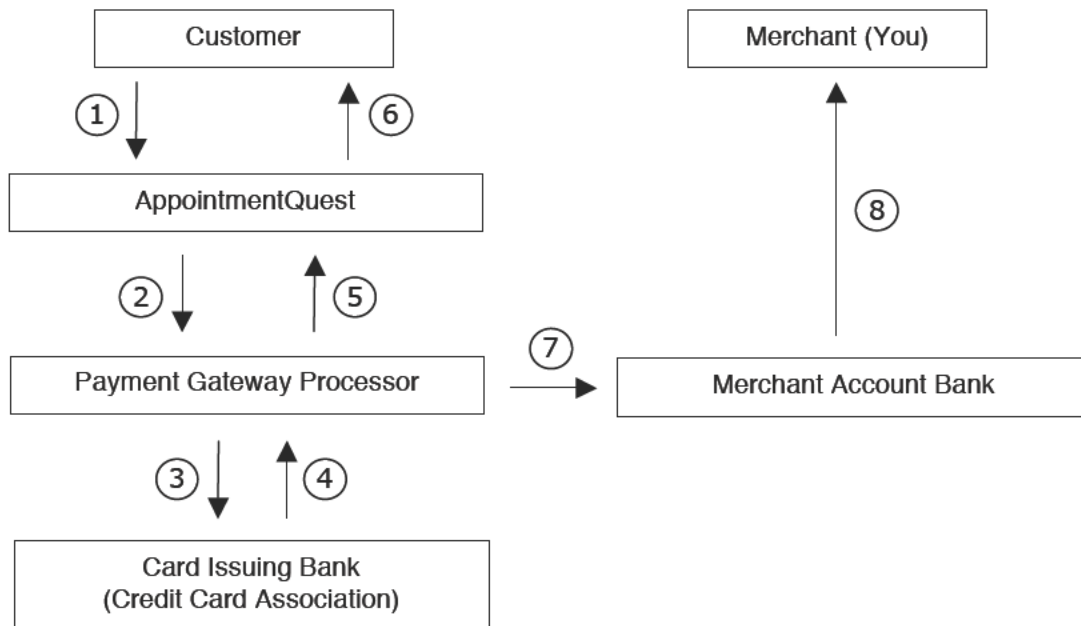
Transaction processing modes supported by AppointmentQuest Online Appointment Scheduler:

- **Immediate Processing.** This processing mode combines authorization and settlement into one transaction by requesting payment gateway processor to mark transaction for settlement immediately after processing authorization. Immediate processing mode should be used when you require customers to submit payments to you immediately. Payment gateway processors usually refer to this type of transaction mode as "Auth-Capture" or "Sale".
- **Delayed Processing.** This processing mode separates authorization from settlement. Initial transaction is submitted to the gateway processor for authorization only, settlement does not occur until you manually submit transaction to the payment processor for funds transfer ("capture" or "settlement"). Authorization transactions remain available for delayed funds capture for 30 days. Delayed processing mode should be used when you require your customers to provide you with their payment information, but do not require payment until the services are rendered. Payment gateway processors usually refer to this type of transaction mode as "Auth-Only, Capture" or "Authorization, Delayed Capture".

AppointmentQuest Online Appointment Scheduler allows you to specify different transaction modes for different services, as well as to use different transaction modes for processing different types of fees. For example, you may want to process appointment registration fees in delayed mode, while require cancellation fees and rescheduling fees to be authorized and captured immediately.

The flow charts further down this chapter represent key steps in the transaction authorization-settlement processes starting from the customer submitting a payment, and finishing with the merchant processing the payment transaction to collect funds.

Immediate Transaction Processing



1. While making an appointment for the schedule that requires payment, customer is transferred to secure server and asked to provide credit card to which payment will be charged. Customer is not allowed to proceed with making an appointment until valid credit card information is provided. AppointmentQuest validates the expiration date on the card, and makes sure that the card number passes checksum validation. When the customer clicks the "Make Appointment" button, payment transaction is submitted to AppointmentQuest.

2. AppointmentQuest sends the auth-capture request to the payment gateway processor (such as PayPal or Authorize.Net, as specified on your AppointmentQuest account).

3. Payment gateway processor sends the authorization request to the customer's credit card issuing bank (or credit card association). The authorization request includes:

- Cardholder name
- Credit card number
- Credit card expiration date
- Billing address
- Type of the transaction ("sale", or "auth-capture")
- Amount of the transaction, including currency (if applicable)

Customer's credit card issuing bank (or Credit Card Association) then:

- Validates the card number
- Checks the amount of the transaction against the available credit
- Checks the billing address provided against the billing address on file

4. The issuing bank (or Credit Card Association) sends the transaction response to the payment gateway processor. The transaction response consists of either an approval or a decline.

If transaction is approved, the amount of the transaction is reserved from the total of available credit for the cardholder. At the same time, transaction is marked for settlement in the next nightly batch, according to the payment gateway processor rules.

5. Payment gateway processor adds response codes to the transaction response and passes the transaction response back to AppointmentQuest. The transaction (if approved) is stored on secure servers at AppointmentQuest for the merchant.

6. Depending on the state of the transaction, the customer (cardholder) receives instructions or confirmation of the transaction:

- If declined, the customer (cardholder) is informed and asked to try a different credit card.
- If the transaction is approved by the Issuing Bank (Credit Card Associations) then the customer (cardholder) is taken to the Appointment Confirmation page.

7. **If transaction is approved**: Payment gateway processor sends transaction details to the financial institution for your merchant account (Merchant Account Bank). The settlement of funds between the issuing bank and the Merchant Account Bank occurs.

8. **If transaction is approved**: Following the settlement, the Merchant Account Bank credits your merchant account. For information about when funds will be deposited, contact your financial institution (Merchant Account Bank). **Funds transfer is complete.**

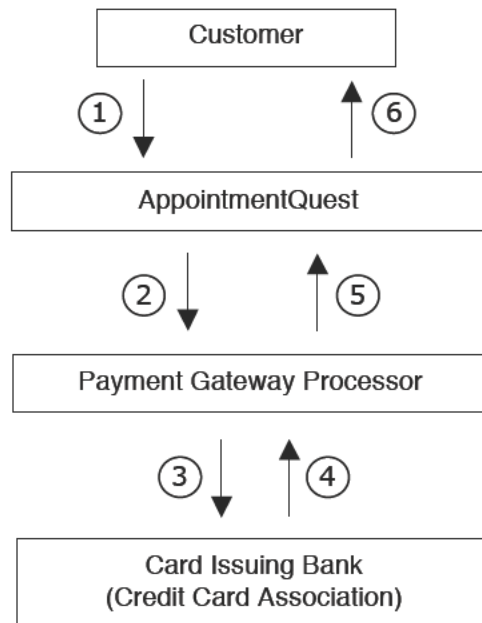
Delayed Transaction Processing

Delayed transaction is a two-phase process:

- **Phase 1 - Authorization** is initiated by the customer upon submitting credit card information for the transaction. Authorization is a process of verifying customer's credit card account for available funds and getting approval for the transaction amount.
- **Phase 2 - Settlement** is initiated by you (the merchant) after authorization phase is completed with approval. Settlement (or "capture") phase is responsible for processing the transaction. Settlement transfers the funds from the customer's credit card account to your merchant's account.

The flow charts below represent the key steps in this two-phase process starting from customer submitting the payment, through completing the transaction by the merchant processing the transaction to collect funds.

Delayed Transaction Processing: Phase 1 - Authorization



1. While making an appointment for the schedule that requires payment, customer is transferred to secure server and asked to provide credit card information to which payment will be charged. Customer is not allowed to proceed with making an appointment until valid credit card information is provided. AppointmentQuest validates the expiration date on the card, and makes sure that the card number passes checksum validation. When the customer clicks the "Make Appointment" button, payment transaction is submitted to AppointmentQuest.

2. AppointmentQuest sends the authorization request to the payment gateway processor (such as PayPal or Authorize.Net, as designated on your AppointmentQuest account).

3. Payment gateway processor sends the authorization request to the customer's credit card issuing bank (or credit card association). The authorization request includes:

- Cardholder name
- Credit card number
- Credit card expiration date
- Billing address
- Type of the transaction ("authorize-only")
- Amount of the transaction, including currency (if applicable)

Customer's credit card issuing bank (or Credit Card Association) then:

- Validates the card number
- Checks the amount of the transaction against the available credit
- Checks the billing address provided against the billing address on file

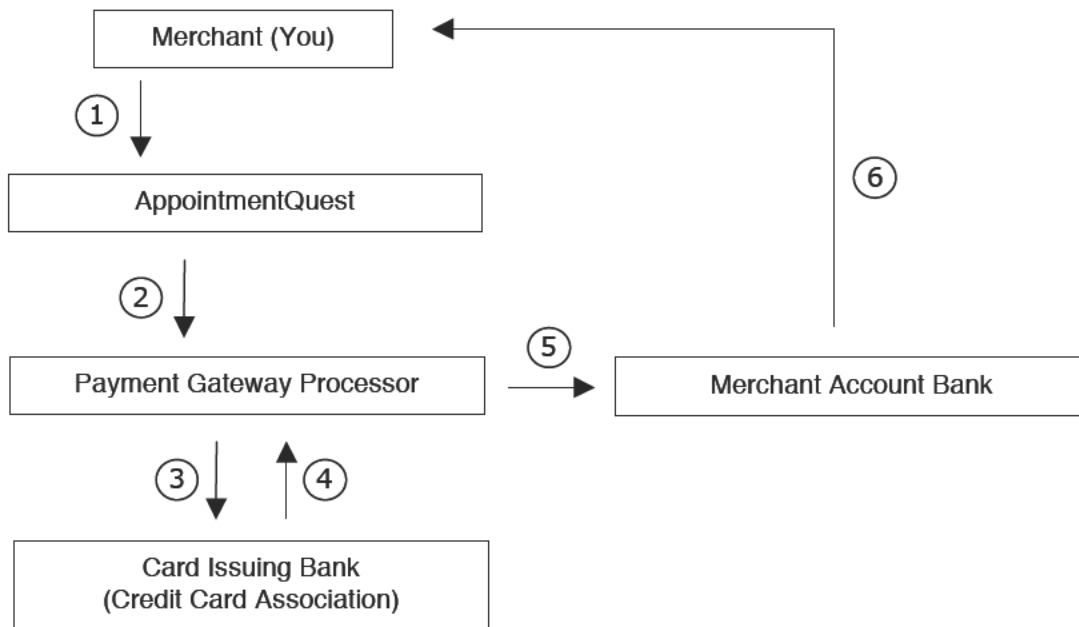
4. The issuing bank (or Credit Card Association) sends the authorization response to the payment gateway processor. The authorization response consists of either an approval or a decline. If approved, the amount of the transaction is reserved from the total of available credit for the cardholder. **No funds are transferred at this time.**

5. Payment gateway processor adds response codes to the authorization response and passes the authorization back to AppointmentQuest. The authorization (if approved) is stored on secure servers at AppointmentQuest for later processing by the merchant (you).

6. Depending on the state of the authorization, the customer (cardholder) receives instructions or confirmation of the transaction:

- If declined, the customer (cardholder) is informed and asked to try a different credit card.
- If the authorization is approved by the issuing bank (Credit Card Associations), then the customer (cardholder) is taken to the Appointment Confirmation page. At this point, authorized transaction is ready for settlement by the merchant (you).

Delayed Transaction Processing: Phase 2 - Settlement



1. You (the merchant) sign in to your AppointmentQuest Online Appointment Scheduler account and go to the Transaction Terminal. The merchant reviews the transaction for signs of fraud. Fraud prevention guidelines for “card not present” transactions are provided by the merchant's financial institution (Merchant Account Bank). When ready to complete the transaction, the merchant clicks the "Process" button on the transaction inspector page. Clicking "Process" initiates the settlement process.

2. The settlement request marks the transaction ready for settlement. Transaction settlement request (“capture”) is sent to the payment gateway processor designated on your AppointmentQuest account.

3. Payment gateway processor submits the settlement request for the customer's transaction to the customer's credit card issuing bank (Credit Card Association) on behalf of the merchant.

4. The issuing bank (Credit Card Association) sends the response to the settlement request back to the payment gateway processor. If the settlement request is accepted, the customer's (cardholder's) credit card account is debited for the amount of the transaction. It is possible that the settlement request may be declined, e.g., if the customer has exceeded their credit limit between the time of the authorization and settlement.

5. **If the settlement request is approved:** Payment gateway processor sends the approval and details of the payment to the merchant's financial institution (Merchant Account Bank). The settlement of funds between the issuing bank and the Merchant Account Bank occurs.

6. **If the settlement request is approved:** Following the settlement, the Merchant Account Bank credits the merchant's account for the amount of the transaction. **Funds are transferred into the merchant's account.** For information about when funds will be deposited, contact your financial institution (Merchant Account Bank).




Before You Begin

Before you get started with setting up payment processing in AppointmentQuest Online Appointment Scheduler, please make sure you have obtained the following:

- Merchant account with major U.S. or Canadian bank.
- Payment gateway account with either PayPal or Authorize.Net.
- Professional membership account with AppointmentQuest.

Account Activation

Payment processing features are not available for AppointmentQuest Free Trial accounts. If you have a trial account with AppointmentQuest, you must activate it into regular subscription in order to take advantage of the credit card processing features. If your account requires activation and/or membership upgrade, you will be prompted with the following page:

Silver PRO	
<p>Silver PRO Membership</p> <p>This membership caters to small businesses and professional practices with up to five employees and up to ten different service types. Silver PRO supports personalization and allows appointment scheduling up to one year in advance.</p>	<p>Membership Benefits</p> <ul style="list-style-type: none"> • 10 Schedules • 5 Business Users • 5 Personnel Records • 10 Custom Forms • 5 Service Locations • 10 Direct Offers • 12 Months Advance • Internal Reservations: YES • Appointment Notifications: YES • Recurring Appointments: YES • Appointment Rescheduling: YES • Import and Export: YES • Personalization: YES • Credit Card Payments: YES
<p>Pricing (USD): \$45.99 per month</p>	
Credit Card Information	
Accepted:	   Your credit card will be validated but not charged at this time
Card Holder Name:	<input type="text"/>
Credit Card Number:	<input type="text"/>
Expiration Date:	<input type="text"/> / <input type="text"/>
Billing Address:	<input type="text"/> <input type="text"/> , <input type="text"/> <input type="text"/> <input type="text"/>
<input type="button" value="Proceed"/> <input type="button" value="Cancel"/>	

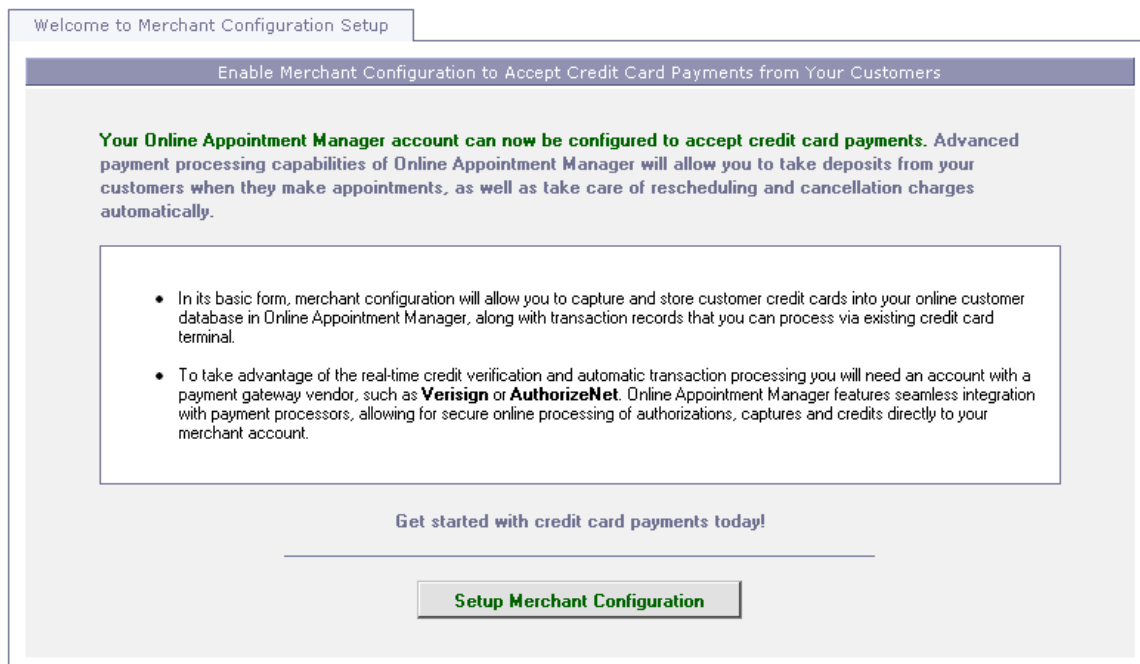
Fill out the credit card form and click “Proceed” button when done. You will not be charged for the account activation, however please keep in mind that if you decide to discontinue using AppointmentQuest services before your trial period is up, you will have to manually cancel your account with AppointmentQuest. Regular subscription accounts do not automatically expire as trial accounts do.

Enabling Payment Processing

To enable credit card payment processing on your AppointmentQuest account you need to perform few simple steps as described in this chapter. Login to your AppointmentQuest account as account administrator and go to Account -> Setup Center. Click on the “Merchant Account Configuration” link under “Transactions”:



If payment configuration has not been previously set up on your AppointmentQuest account, you will be prompted with the following page:

A screenshot of a web page titled "Welcome to Merchant Configuration Setup". The page has a purple header bar with the text "Enable Merchant Configuration to Accept Credit Card Payments from Your Customers". Below the header, there is a green text block: "Your Online Appointment Manager account can now be configured to accept credit card payments. Advanced payment processing capabilities of Online Appointment Manager will allow you to take deposits from your customers when they make appointments, as well as take care of rescheduling and cancellation charges automatically." Below this text is a white box containing two bullet points: "• In its basic form, merchant configuration will allow you to capture and store customer credit cards into your online customer database in Online Appointment Manager, along with transaction records that you can process via existing credit card terminal." and "• To take advantage of the real-time credit verification and automatic transaction processing you will need an account with a payment gateway vendor, such as Verisign or AuthorizeNet. Online Appointment Manager features seamless integration with payment processors, allowing for secure online processing of authorizations, captures and credits directly to your merchant account." Below the white box is a blue text block: "Get started with credit card payments today!". At the bottom of the page is a green button with the text "Setup Merchant Configuration".

Click on the “Setup Merchant Configuration” button at the bottom of the page to proceed.

Merchant Configuration Editor

Master Settings

Transaction Mode: Live Mode Test Mode

Card Types Accepted

American Express Diner's Club Discover JCB MasterCard VISA

Customer Receipts

Send e-mail receipts to customers on successful charge and credit transactions

Transaction Processing Fees

Option A

- Best value for processing transactions that are usually under \$100.00
- Transaction fee: \$0.50 + 2% of the transaction amount

Option B

- Cost-effective for transaction amounts in between \$100.00 and \$500.00
- Transaction fee: \$1.50 + 1% of the transaction amount

Option C

- Perfect when majority of transactions are over \$500.00
- Transaction fee: \$6.50 per transaction, flat rate

Select credit card types you would like to accept (for example, add American Express). Choose Transaction Processing Fee Plan from the list of options presented (selection is required).

Merchant Configuration Editor

Master Settings

Transaction Mode: Live Mode Test Mode

Card Types Accepted

American Express Diner's Club Discover JCB MasterCard VISA

Customer Receipts

Send e-mail receipts to customers on successful charge and credit transactions

Transaction Processing Fees

Option A

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- Cost-effective for transaction amounts in between \$100.00 and \$500.00
- Transaction fee: \$1.50 + 1% of the transaction amount

Option C

- Perfect when majority of transactions are over \$500.00
- Transaction fee: \$6.50 per transaction, flat rate

Transaction processing fees do not apply to test transactions

Click “Save” button when done making selections on this page. This will save your configuration. Upon saving your merchant configuration, you will return to the Merchant Configuration Inspector page. Once your initial configuration has been created, you can get to this page anytime you need by clicking on the “Merchant Account Configuration” link from your Account Setup Center.

If you need to make changes to the original configuration, click on the “Edit” button on the right hand side, under “Actions”. You may need to make changes to your merchant configuration when you start honoring cards not previously accepted, to change transaction processing mode, select another Transaction Fee Plan, or to temporarily disable payment processing altogether.

Master Settings		Actions
Payment Processing:	Enabled	Transaction Mode: Test Mode
Card Types Accepted:	<ul style="list-style-type: none"> ✓ American Express - card checksum and expiration date validation only Diner's Club - not accepted Discover - not accepted JCB - not accepted ✓ MasterCard - card checksum and expiration date validation only ✓ VISA - card checksum and expiration date validation only 	Edit
Customer Receipts:	E-mail receipts are sent to customers on successful charge and credit transactions	
Transaction Fees:	Option A <ul style="list-style-type: none"> • Best value for processing transactions that are usually under \$100.00 • Transaction fee: \$0.50 + 2% of the transaction amount <p style="text-align: center; color: blue;">Transaction processing fees do not apply to test transactions</p>	
<p>To take advantage of the real-time credit verification and automatic transaction processing you will need an account with a payment gateway vendor, such as Verisign or AuthorizeNet. Online Appointment Manager features seamless integration with payment processors, allowing for secure online processing of authorizations, captures and credits directly to your merchant account.</p>		
<input type="button" value="Add Merchant Account"/>		

At this point your AppointmentQuest account is configured to process credit card payments in test mode, transactions can only be settled off-line.

Adding Merchant Account

If you are planning to process transactions online using one or more gateway processor accounts you have obtained from either PayPal or Authorize.Net, proceed to configuring your first merchant account by clicking on the “Add Merchant Account” button at the bottom of the Merchant Configuration Inspector page:

Detailed instructions on how to set up your merchant account (payment gateway vendor account) are provided further down this chapter. If you are planning to use PayPal Payflow PRO as your payment gateway, you may skip the section describing Authorize.Net account setup, and vice versa.

PayPal Payflow PRO

IMPORTANT NOTE: In order to use PayPal as your payment gateway processor in AppointmentQuest Online Appointment Scheduler, you need to have a Payflow PRO account with PayPal. Payflow Link accounts are not supported by AppointmentQuest.

Click on the “PayPal Payflow PRO” button to select PayPal as your payment gateway processor:

Merchant Account Editor

New Merchant Account

Select Payment Processor Verisign Payflow PRO AuthorizeNet Payment Services

The page will expand to present you with settings you can configure for the selected payment gateway processor (PayPal Payflow PRO):

Merchant Account Editor

Verisign Payflow PRO

Payment Processor Verisign Payflow PRO AuthorizeNet Payment Services

Merchant Account Name: Verisign Payflow PRO

Processor Mode: Test Mode

Payment Methods

American Express Diner's Club Discover JCB MasterCard VISA

Verisign Merchant Account Credentials

Partner: VeriSign (usually 'VeriSign', case sensitive)

Vendor: (enter the Vendor ID assigned to you by Verisign)

User: (enter the User ID assigned to you by Verisign)

Password: (enter the Password assigned to you by Verisign)

- **Merchant Account Name** is for your reference only. If you have multiple accounts with the same payment gateway vendor, you may change it to something that will help you to easily identify the account, such as “Primary PayPal”. If you only have one account with this vendor, you may leave Merchant Account Name at default setting.
- **Processor Mode** defines which transactions will be processed through this payment gateway account at this time. It can be either “Test Mode” or “Live Mode”. Until you complete and test your payment gateway configuration, it is advisable to keep Processor Mode in “Test Mode”. You will be able to change it to “Live Mode” once you complete your testing.
- **Payment Methods** define credit card types that you are allowed to process through your PayPal account. Payment Methods selected here should not necessarily match settings from your Merchant Configuration. For example, you may allow American Express cards to be accepted on your AppointmentQuest Online Appointment Scheduler account, but

choose not to process American Express cards through the PayPal account. In this case, American Express cards will either go through simple card number validation, or will be processed through another payment gateway account (if you create one at a later time).

- **PayPal Merchant Account Credentials** section needs to be filled in with the following:

PARTNER: The authorized PayPal reseller that registered you for the Payflow PRO service provided you with a Partner ID. If you registered yourself, use “PayPal” (no quotes). Partner ID is case sensitive. If you have a legacy account with CyberCash or VeriSign that has been converted to PayPal Payflow PRO, you may need to enter “Cybercash” or “VeriSign” (no quotes) in this field.

VENDOR: Case-sensitive Vendor ID that you defined while registering for the account with PayPal. In most cases it is your company name, all lowercase.

USER: Case-sensitive login ID for the Payflow PRO account that you defined while registering for the account with PayPal. In the future, each PayPal account will allow multiple users. At this time your User ID is most likely the same as your Vendor ID.

PASSWORD: Case-sensitive 6- to 32-character password that you defined while registering for the account with PayPal. Password field will be masked for security reasons.

All fields are required.

If you are not sure what are your PayPal Merchant Account Credentials, please contact PayPal customer service for assistance.

Once you have entered all the information for your PayPal Payflow PRO account, click “Save” button on the bottom of the page to save your configuration:

Merchant Account Editor

Verisign Payflow PRO

Payment Processor	Verisign Payflow PRO AuthorizeNet Payment Services
Merchant Account Name:	<input style="width: 90%;" type="text" value="Verisign Payflow PRO"/>
Processor Mode:	<input type="text" value="Test Mode"/>

Payment Methods

American Express
 Diner's Club
 Discover
 JCB
 MasterCard
 VISA

Verisign Merchant Account Credentials

Partner:	<input style="width: 60%;" type="text" value="VeriSign"/>	(usually 'VeriSign', case sensitive)
Vendor:	<input style="width: 60%;" type="text" value="mycompanyname"/>	(enter the Vendor ID assigned to you by Verisign)
User:	<input style="width: 60%;" type="text" value="mycompanyname"/>	(enter the User ID assigned to you by Verisign)
Password:	<input style="width: 60%;" type="password" value="*****"/>	(enter the Password assigned to you by Verisign)

Save
Reset
Cancel

Authorize.Net Payment Services

Click on the “AuthorizeNet Payment Services” button to select Authorize.Net as your payment gateway processor:

Merchant Account Editor

New Merchant Account

Select Payment Processor Verisign Payflow PRO AuthorizeNet Payment Services

The page will expand to present you with settings you can configure for the selected payment gateway processor (AuthorizeNet Payment Services):

Merchant Account Editor

AuthorizeNet Payment Services

Payment Processor Verisign Payflow PRO AuthorizeNet Payment Services

Merchant Account Name: AuthorizeNet Payment Services

Processor Mode: Test Mode

Payment Methods

American Express Diner's Club Discover JCB MasterCard VISA

AuthorizeNet Merchant Account Credentials

Login ID: (enter the Login ID provided to you by AuthorizeNet)

Transaction Key: (enter the Transaction Key provided to you by AuthorizeNet)

- **Merchant Account Name** is for your reference only. If you have multiple accounts with the same payment gateway vendor, you may change it to something that will help you to easily identify the account, such as “Primary AuthorizeNet Account”. If you only have one account with this vendor, you may leave Merchant Account Name at default setting.
- **Processor Mode** defines which transactions will be processed through this payment gateway account at this time. It can be either “Test Mode” or “Live Mode”. Until you complete and test your payment gateway configuration, it is advisable to keep Processor Mode in “Test Mode”. You will be able to change it to “Live Mode” once you complete your testing.
- **Payment Methods** define credit card types that you are allowed to process through your AuthorizeNet account. Payment Methods selected here should not necessarily match settings from your Merchant Configuration. For example, you may allow American Express cards to be accepted on your AppointmentQuest Online Appointment Scheduler account, but choose not to process American Express cards through AuthorizeNet account. In this case, American Express cards will either go through simple card number validation, or will be processed through another payment gateway account (if you create one at a later time).

- **AuthorizeNet Merchant Account Credentials** section needs to be filled in with:

LOGIN ID: This is the Login ID you have registered with AuthorizeNet. The same Login ID is used to access the AuthorizeNet Merchant Interface.

TRANSACTION KEY: Case-sensitive transaction key obtained from the AuthorizeNet Merchant Interface. Transaction Key is not the same as the Password that is used to access the AuthorizeNet Merchant Interface. You need to login to AuthorizeNet Merchant Interface using your Login ID and Password to obtain the Transaction Key. The URL to the AuthorizeNet Merchant Interface is available to the merchant from their merchant service provider.

Both fields are required.

If you are not sure what are your AuthorizeNet Merchant Account Credentials, please contact Authorize.Net Payment Services or your merchant service provider for assistance.

Once you have entered all the information for your AuthorizeNet account, click “Save” button on the bottom of the page to save your configuration:

The screenshot shows a web form titled "Merchant Account Editor" with a tab for "AuthorizeNet Payment Services". The form is divided into several sections:

- Payment Processor:** A dropdown menu showing "Verisign Payflow PRD" and a button labeled "AuthorizeNet Payment Services".
- Merchant Account Name:** A text input field containing "AuthorizeNet Payment Services".
- Processor Mode:** A dropdown menu showing "Test Mode".
- Payment Methods:** A section with checkboxes for "American Express", "Diner's Club", "Discover", "JCB", "MasterCard", and "VISA". "American Express", "MasterCard", and "VISA" are checked.
- AuthorizeNet Merchant Account Credentials:** A section with two text input fields: "Login ID:" (containing "myloginid") and "Transaction Key:" (containing "*****"). To the right of each field is a placeholder text: "(enter the Login ID provided to you by AuthorizeNet)" and "(enter the Transaction Key provided to you by AuthorizeNet)".

At the bottom of the form are three buttons: "Save", "Reset", and "Cancel".

Reviewing Your Configuration

Once you have added merchant account to your configuration, now it is time to review all settings currently stored on your account. You will be automatically transferred to this page after adding the merchant account as described in the previous chapter. You may also get to this page anytime you need from Account -> Setup center -> Merchant Account Configuration:

Merchant Configuration		Actions
Master Settings		
Payment Processing:	Enabled	Transaction Mode: Test Mode
Card Types Accepted:	<ul style="list-style-type: none"> ✓ American Express - via merchant account Diner's Club - not accepted Discover - not accepted JCB - not accepted ✓ MasterCard - via merchant account ✓ VISA - via merchant account 	<input type="button" value="Edit"/>
Customer Receipts:	E-mail receipts are sent to customers on successful charge and credit transactions	
Transaction Fees:	Option A <ul style="list-style-type: none"> • Best value for processing transactions that are usually under \$100.00 • Transaction fee: \$0.50 + 2% of the transaction amount <p style="text-align: center; color: blue;">Transaction processing fees do not apply to test transactions</p>	
Merchant Accounts		Actions
Verisign Payflow PRO - Verisign (Test Mode)		<input type="button" value="Inspect"/>
<ul style="list-style-type: none"> ✓ American Express Diner's Club Discover JCB ✓ MasterCard ✓ VISA 		<input type="button" value="Edit"/>
		<input type="button" value="Delete"/>
<input type="button" value="Add Merchant Account"/>		
<input type="button" value="Transaction Terminal"/> <input type="button" value="New Transaction"/>		

Top section of the page displays your master configuration settings, such as transaction mode, card types accepted, customer receipt preference, as well as your transaction fee plan selection. If you need to make changes to your master configuration settings, click on the “Edit” button in the right hand side corner of the page under “Actions”.

Further down the page, all your merchant accounts will be listed. If you need to make changes to your merchant account configuration (payment gateway settings), click on the “Edit” button next to the merchant account name.

NOTE: Do not change processing mode to “Live Mode” until you have tested your configuration.

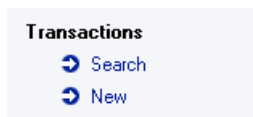
If all settings appear to be correct, proceed to testing your payment configuration.

Testing Your Configuration

Before you configure fee settings on your schedules and start accepting payments from your customers, you need to test your payment configuration to make sure merchant account settings you have entered in AppointmentQuest Online Appointment Scheduler match your payment gateway vendor account, and that transactions can be processed successfully in the test mode.

NOTE: Before running your first test transaction, please make sure that both your master configuration and merchant account are set to the “Test Mode”.

The easiest way to test your configuration is by running a test transaction. To start the test transaction, click on the “New” link under Transactions from the navigation bar located on the left hand side of AppointmentQuest Online Appointment Scheduler:



The page that will appear is the same one you will later use to run live transactions for your customers. At this time, you will need to enter contact information for the “dummy” customer record that will be used on the test transaction you are about to run.

Based on your Required Information Policy, the list of fields on this page may be slightly different from pictured below, though it will not make any difference for the test transaction:

 A screenshot of a web application interface for entering a new transaction. At the top, there are three tabs: "Select Customer >", "Payment Source >", and "Enter Transaction". Below these is a header "New Transaction". Underneath, there are three sub-tabs: "New Customer", "Returning Customer", and "Customer Search". The "New Customer" tab is active, showing a "New Customer Profile" form. The form includes the following fields:

- First Name: [text input]
- Last Name: [text input]
- Daytime Phone: [text input] ext. [text input] (optional)
- Evening Phone: [text input] (optional)
- E-mail: [text input] (optional)
- E-mail Preference: Rich Text (HTML) Plain Text (ASCII) (optional)
- Address: [text input]
- [text input] [dropdown menu]
- United States [dropdown menu] (optional)

 At the bottom of the form are two buttons: "Proceed" and "Cancel".

Fill out the form with some test customer information. For example, you may fill out the form as shown below (test customer John Doe):

Select Customer > Payment Source > Enter Transaction

New Transaction for John Doe

New Customer Returning Customer Customer Search

New Customer Profile

First Name:

Last Name:

Daytime Phone: ext. (optional)

Evening Phone: (optional)

E-mail: (optional)

E-mail Preference: Rich Text (HTML) Plain Text (ASCII) (optional)

Address:
 ,
 (optional)

Click “Proceed” button on the bottom of the page to advance to the next step – entering credit card information:

Select Customer > **Payment Source >** Enter Transaction

New Transaction for John Doe

Customer Credit Card Information

Card Type:

Card Holder Name:

Credit Card Number:

Expiration Date: /

Billing Address:
 ,

1. Click on the “Copy Name & Address from Customer” button to pre-populate the form with the customer information entered in the previous step.
2. Enter test credit card number. Each payment gateway processor has its own list of credit card numbers that can be used in “Test Mode” (you can get the most up-to-date list from your payment gateway vendor, or use one of the test cards listed in Account -> Setup Center -> Merchant Configuration Summary -> “Inspect” next to Merchant Account -> “Test Card Numbers” section). For example, you may use:

Card Type: **VISA** Card Number: **4111 1111 1111 1111**

3. Enter card expiration date (MM / YYYY). It can be any date in the future.
Completed form should look as show below. All fields are required:

Select Customer >	Payment Source >	Enter Transaction
New Transaction for John Doe		
Customer Credit Card Information		
Card Type:	VISA	
Card Holder Name:	John Doe	
Credit Card Number:	4111 1111 1111 1111	
Expiration Date:	02 / 2010	
Billing Address:	123 Main Street	
	Anytown	CA 12345
	United States	
Copy Name & Address from Customer		
Proceed Cancel		

Click "Proceed" button at the bottom of the page to enter your test transaction:

Select Customer >	Payment Source >	Enter Transaction	
New Transaction for John Doe			
Customer Contact Information		Payment Source Information	
Name:	John Doe	Card Type:	VISA
E-mail:	(not on file)	Card Holder Name:	John Doe
Daytime Phone:	(555) 321-5476	Credit Card Number:	**** * 1111 (VISA)
Evening Phone:	(not on file)	Expiration Date:	02/10
Address:	123 Main Street Anytown, CA 12345 USA	Billing Address:	123 Main Street Anytown, CA 12345 USA
Edit Customer Record		Edit Payment Source	
Transaction Details			
Type:	Charge		
Amount:	\$0.00	USD	
Transaction to be	processed through merchant account		
Advanced			
TEST MODE - Transaction with no Monetary Value			
Submit Reset Cancel			

Change the transaction amount to any value you like (please note that your payment gateway may enforce restrictions on test transaction amounts, for example it is known that transactions over \$1,000 are usually declined in test mode by the payment gateway).

For example, you may enter "\$1.00" (one dollar) in the "Amount" field. This is a test transaction, and no actual charges will be made – transaction has no monetary value.

To make sure you run a clean test, do not change the transaction type or settlement option field values at this time. Ready to complete transaction page should look as shown below:

Select Customer >	Payment Source >	Enter Transaction
New Transaction for John Doe		
Customer Contact Information		Payment Source Information
Name: John Doe		Card Type: VISA
E-mail: (not on file)		Card Holder Name: John Doe
Daytime Phone: (555) 321-5476		Credit Card Number: **** * 1111 (VISA)
Evening Phone: (not on file)		Expiration Date: 02/10
Address: 123 Main Street Anytown, CA 12345 USA		Billing Address: 123 Main Street Anytown, CA 12345 USA
<input type="button" value="Edit Customer Record"/>		<input type="button" value="Edit Payment Source"/>
Transaction Details		
Type: <input type="text" value="Charge"/>		
Amount: <input type="text" value="\$1.00"/> <input type="text" value="USD"/>		
Transaction to be <input type="text" value="processed through merchant account"/>		
<input type="button" value="Advanced"/>		
TEST MODE - Transaction with no Monetary Value		
<input type="button" value="Submit"/> <input type="button" value="Reset"/> <input type="button" value="Cancel"/>		

Click "Submit" button to submit the transaction to your payment gateway processor. If transaction succeeds, you should see the following receipt page (note "Reference" and "Approved"):

Search	Summary	Inspector
Charge Transaction Details #700217455020000310		
Customer: John Doe	Originated: 02/07/2005 03:34 PM MST	
Amount: \$1.00 USD	Completed: 02/07/2005 03:34 PM MST	
Status: Charge - Completed	Reference: V64A74842072	
Notes: Approved		
TEST MODE - Transaction with no Monetary Value		
Payment Source		
Card Holder Name: John Doe		
Credit Card Number: **** * 1111 (VISA)		
Expiration Date: 02/10		
Billing Address: 123 Main Street Anytown, CA 12345 USA		
Actions:	<input type="button" value="Credit"/>	<input type="button" value="Delete Test Transaction"/> <input type="button" value="New Reference Transaction"/>
Customer Contact Information		
Name: John Doe		
E-mail: (not on file)		
Daytime Phone: (555) 321-5476		
Evening Phone: (not on file)		
Address: 123 Main Street Anytown, CA 12345 USA		
<input type="button" value="Customer Payments / Transaction Summary"/>		

Successful Test

Search	Summary	Inspector
Charge Transaction Details #700217455020000310		
Customer:	John Doe	Originated: 02/07/2005 03:34 PM MST
Amount:	\$1.00 USD	Completed: 02/07/2005 03:34 PM MST
Status:	Charge - Completed	Reference: V64A74842072
Notes:	Approved	
TEST MODE - Transaction with no Monetary Value		
Payment Source		
Card Holder Name:	John Doe	
Credit Card Number:	**** * 1111 (VISA)	
Expiration Date:	02/10	
Billing Address:	123 Main Street Anytown, CA 12345 USA	
Actions:	Credit	Delete Test Transaction
Customer Contact Information		
Name:	John Doe	
E-mail:	(not on file)	
Daytime Phone:	(555) 321-5476	
Evening Phone:	(not on file)	
Address:	123 Main Street Anytown, CA 12345 USA	
Customer Payments / Transaction Summary		

If transaction has been **approved** you will see the following attributes:

- “Charge - Completed” in Status
- “Approved” in Notes
- Alphanumeric vendor-assigned transaction number in Reference

If transaction has been **declined** you will see the following attributes:

- “Charge - Declined” in Status
- Specific transaction processing error message in Notes
- Transaction number may or may not be assigned to Reference

In both cases you have successfully completed integration test with your payment gateway.

Failed Test

If you see an error message indicating failed merchant authentication, than the integration test has failed (your AppointmentQuest account could not use to your payment gateway account):

Unable to proceed. Please correct the following error:

- Transaction Failed: VERISIGN Merchant authentication failed (1: User authentication failed)

You need to re-enter your merchant account credentials as described in the previous chapter, and then run another test transaction to fix the problem.

Enabling Customer Payments

In order to start accepting credit card payments from your customers, you need to configure appointment registration, rescheduling and cancellation fees on your schedules. Assuming you already have schedules on your AppointmentQuest account, you may proceed to configure appointment fees directly from Account -> Setup Center -> Merchant Account Configuration:

Master Settings		Actions
Payment Processing:	Enabled	Transaction Mode: Test Mode <input type="button" value="Edit"/>
Card Types Accepted:	<ul style="list-style-type: none"> ✓ American Express - via merchant account Diner's Club - not accepted Discover - not accepted JCB - not accepted ✓ MasterCard - via merchant account ✓ VISA - via merchant account 	
Customer Receipts:	E-mail receipts are sent to customers on successful charge and credit transactions	
Transaction Fees:	Option A <ul style="list-style-type: none"> Best value for processing transactions that are usually under \$100.00 Transaction fee: \$0.50 + 2% of the transaction amount <p style="text-align: center; color: blue;">Transaction processing fees do not apply to test transactions</p>	
Merchant Accounts		Actions
Verisign Payflow PRO - Verisign (Test Mode)		<input type="button" value="Inspect"/>
<ul style="list-style-type: none"> ✓ American Express Diner's Club Discover JCB ✓ MasterCard ✓ VISA 		<input type="button" value="Edit"/>
		<input type="button" value="Delete"/>
<input type="button" value="Add Merchant Account"/>		
Appointment Fees on Schedules		
Chair Massage:	Payment Processing Disabled	<input type="button" value="Edit"/>
Free Consultation:	Payment Processing Disabled	<input type="button" value="Edit"/>

To configure fees on a particular schedule, click on the “Edit” button next to the schedule name in the “Appointment Fees on Schedules” section. Schedule Editor page will appear:

General	Settings	Business Hours	Availability	Notifications	Payments
Chair Massage					
Payment Processing: Disabled					
Appointment Fee:	N/A			Currency	
Rescheduling Fee:	N/A			N/A	
Cancellation Fee:	N/A				
Appointments:		Internal			External
Appointment Charge:	N/A			N/A	
Rescheduling Charge:	N/A			N/A	
Cancellation Charge:	N/A			N/A	
<input type="button" value="Enable Payment Processing"/>					

Click on the “Enable Payment Processing” button on the bottom of the page to proceed.

Schedule Fees

Schedule payment configuration does not require any fees by default. Based on your business needs, you may require any combination of appointment registration fee, re-scheduling fee and cancellation fee:

General	Settings	Business Hours	Availability	Notifications	Payments
Chair Massage					
Payment Processing: Enabled					
Appointment Fee:	None	<input type="button" value="Enter Fee"/>	Currency		
Rescheduling Fee:	None	<input type="button" value="Enter Fee"/>	USD (United States Dollars)		
Cancellation Fee:	None	<input type="button" value="Enter Fee"/>			
Appointments:	Internal		External		
Appointment Charge:	N/A		N/A		
Rescheduling Charge:	N/A		N/A		
Cancellation Charge:	N/A		N/A		

1. Click "Enter Fee" button next to the fees you would like to enable on the schedule.
2. Enter fee amounts as shown below (for example, \$25.00 for appointment registration fee, \$10.00 for appointment cancellation fee, no fee for rescheduling appointments):

General	Settings	Business Hours	Availability	Notifications	Payments
Chair Massage					
Payment Processing: Enabled					
Appointment Fee:	<input type="text" value="\$25.00"/>	<input type="button" value="Remove Fee"/>	Currency		
Rescheduling Fee:	None	<input type="button" value="Enter Fee"/>	USD (United States Dollars)		
Cancellation Fee:	<input type="text" value="\$10.00"/>	<input type="button" value="Remove Fee"/>			
Appointments:	Internal		External		
Appointment Charge:	<input type="text" value="Process Immediately"/>		<input type="text" value="Process Immediately"/>		
Rescheduling Charge:	N/A		N/A		
Cancellation Charge:	<input type="text" value="Process Immediately"/>		<input type="text" value="Process Immediately"/>		

After the fee has been added, you can remove it by clicking on the "Remove Fee" button next to the fee type. Adding and removing fees updates settlement option section further down the page.

Appointment fees are defined "per appointment". This means if you allow recurring appointments on the schedule, total fee for the recurring appointment set will be calculated based on a number of appointments requested. For example, if appointment fee is set to \$25, than weekly recurring appointment for 4 weeks will have a total fee of \$100.

You may notice that rescheduling option is not always available, depending on whether you allow rescheduling for a particular type of appointment on the schedule, or not (as configured in the "General" tab of the Schedule Editor). For example, if you do not allow external rescheduling, rescheduling fee and charge option will not be applicable to external appointments.

Settlement Options

Customer charge processing requirements and settlement options for internal and external actions can be configured independently. Requirement and settlement options are defined in the bottom section of the “Payments” tab of the Schedule Editor:

General	Settings	Business Hours	Availability	Notifications	Payments
Chair Massage					
Payment Processing: Enabled					
Appointment Fee:	\$25.00	Remove Fee	Currency		
Rescheduling Fee:	None	Enter Fee	USD (United States Dollars)		
Cancellation Fee:	\$10.00	Remove Fee			
Appointments:	Internal		External		
Appointment Charge:	Process Immediately		Authorize Only		
Rescheduling Charge:	N/A		N/A		
Cancellation Charge:	Process Immediately		Process Immediately		
			Process Immediately		
			Authorize Only		
			Not Required		
Disable Payment Processing					

This section has two columns of independent settings:

- **Internal** settings apply to all actions taken by **you** or **your staff** in AppointmentQuest Online Appointment Scheduler on behalf of your customers. Internal appointment charge is applied when appointment is made by you or your staff member. Internal rescheduling charge is applied to rescheduling performed by you or your staff member even if the original appointment has been scheduled by the customer herself, i.e. “externally”. Same rule applies to internal cancellations.
- **External** settings apply to all actions taken by **your customers** in your online scheduler. External appointment charge is applied when appointment is self-scheduled by the customer. External rescheduling charge is applied to rescheduling performed by the customer even if the original appointment has been scheduled by you or your staff, i.e. “internally”. Same rule applies to cancellations performed by customers themselves.

Each charge option can be configured to one of three options:

- **Process Immediately** option dictates the corresponding fee to be charged to the customer’s card immediately via “**Immediate Transaction Processing**” procedure described in the very beginning of this guide. Customer’s card is authorized and transaction is marked for immediate settlement.
- **Authorize Only** option stages the corresponding fee to be authorized and saved for settlement at a later time via “**Delayed Transaction Processing**” procedure described at the beginning of this guide. Customer’s card is authorized, however transaction is not marked for automatic settlement awaiting approval from you or your authorized staff member to complete the transaction by executing transaction capture manually.
- **Not Required** option disables particular charge from processing. Customer’s card is not required to perform corresponding action, no fee is due.

There is one very specific case that should be considered. If you require your customers to pre-pay appointments, you always have a credit card on file for the customer to which rescheduling fee, cancellation fee, or both can be charged if needed. However, if you do not require your customers to pre-pay (“Appointment Fee” set to “None”), you may still need to ask your customers for their credit cards at the time when they make appointments, to make sure you have their credit cards on file. This particular case introduces an option for the customer’s card to be provided at the time when appointment is scheduled. This option is defined in a “Customer Card” table by two independent settings for “New Internal” and “New External” appointments):

General	Settings	Business Hours	Availability	Notifications	Payments
Chair Massage					
Payment Processing: Enabled					
Appointment Fee:	None	Enter Fee		Currency	
Rescheduling Fee:	\$20.00	Remove Fee		USD (United States Dollars)	
Cancellation Fee:	\$10.00	Remove Fee			
Appointments:	New Internal			New External	
Customer Card:	<input checked="" type="radio"/> Required <input type="radio"/> NOT Required			<input checked="" type="radio"/> Required <input type="radio"/> NOT Required	
Appointments:	Internal			External	
Appointment Charge:	N/A			N/A	
Rescheduling Charge:	Process Immediately			N/A	
Cancellation Charge:	Process Immediately			Process Immediately	

- **Customer Card: Required** setting will require customer’s card to be entered at the time when new appointment is scheduled. The card will be validated (see more on credit card validation procedure below), but not charged. Customer’s card will remain on file ready to be used for rescheduling or cancellation fee processing should the customer be required to provide a payment for such fee at a later time.
- **Customer Card: NOT Required** removes the condition for the customer’s card to be provided at the time when new appointment is scheduled. Should customers need to reschedule or cancel their appointments at a later time, they will be asked to provide their credit card information to complete rescheduling or cancellation. No customer card will be stored with the appointment (or the customer record), and you may not be able to process appropriate payment without asking the customer for the credit card information at a time of rescheduling or cancellation.

Credit Card Validation

Most credit card issuing banks do not offer procedures for checking card validity without placing a charge on the card. AppointmentQuest employs the following industry-standard and payment gateway approved procedure to validate credit cards when no charge is due (see above):

1. Authorization transaction for the amount of \$1 is issued against the credit card to be validated. Authorization response (“approved” or “declined”) from the payment gateway processor is used to determine whether the credit card is valid or not.
2. If the authorization transaction is approved, it is immediately voided to prevent further processing. Depending on the rules set up by the payment gateway, initial authorization transaction is either discarded immediately, or at a later time.

When you are done configuring fees and settlement options on the schedule, click “Save” button on the bottom of the page to save your configuration:

General	Settings	Business Hours	Availability	Notifications	Payments
---------	----------	----------------	--------------	---------------	-----------------

Chair Massage

Payment Processing: Enabled

Appointment Fee:	None	Enter Fee	Currency USD (United States Dollars)
Rescheduling Fee:	\$20.00	Remove Fee	
Cancellation Fee:	\$10.00	Remove Fee	

Appointments:	New Internal	New External
Customer Card:	<input checked="" type="radio"/> Required <input type="radio"/> NOT Required	<input checked="" type="radio"/> Required <input type="radio"/> NOT Required

Appointments:	Internal	External
Appointment Charge:	N/A	N/A
Rescheduling Charge:	Process Immediately	N/A
Cancellation Charge:	Process Immediately	Process Immediately

Your master configuration will be updated to display schedule appointment fees as “Configured”:

Merchant Configuration		
------------------------	--	--

Master Settings		Actions
Payment Processing:	Enabled	Transaction Mode: Test Mode
Card Types Accepted:	<ul style="list-style-type: none"> ✓ American Express - via merchant account Diner's Club - not accepted Discover - not accepted JCB - not accepted ✓ MasterCard - via merchant account ✓ VISA - via merchant account 	<input type="button" value="Edit"/>
Customer Receipts:	E-mail receipts are sent to customers on successful charge and credit transactions	
Transaction Fees:	Option A <ul style="list-style-type: none"> Best value for processing transactions that are usually under \$100.00 Transaction fee: \$0.50 + 2% of the transaction amount <p style="text-align: center; color: blue;">Transaction processing fees do not apply to test transactions</p>	

Merchant Accounts		Actions
Verisign Payflow PRO - Verisign (Test Mode)		<input type="button" value="Inspect"/>
<ul style="list-style-type: none"> ✓ American Express Diner's Club Discover JCB ✓ MasterCard ✓ VISA 		<input type="button" value="Edit"/>
		<input type="button" value="Delete"/>
<input type="button" value="Add Merchant Account"/>		

Appointment Fees on Schedules		Actions
Chair Massage:	Configured	<input type="button" value="Edit"/>
Free Consultation:	Payment Processing Disabled	<input type="button" value="Edit"/>

Running Transactions in Delayed Processing Mode

Your Transaction Terminal in AppointmentQuest Online Appointment Scheduler is configured to enter all new manual customer transactions in “Immediate Transaction Processing” mode by default. You may override this setting while entering the transaction to force the transaction into “Delayed Transaction Processing” mode (please see beginning of this guide for more information on “Immediate Transaction Processing” and “Delayed Transaction Processing”).

To change processing mode for the new transaction, use the pull-down list below the transaction amount to select “Transaction to be authorized and saved for delayed capture” option:

Select Customer >	Payment Source >	Enter Transaction
New Transaction for John Doe		
Customer Contact Information		Payment Source Information
Name: John Doe		Card Type: VISA
E-mail: (not on file)		Card Holder Name: John Doe
Daytime Phone: (555) 321-5476		Credit Card Number: **** * 1111 (VISA)
Evening Phone: (not on file)		Expiration Date: 02/10
Address: 123 Main Street Anytown, CA 12345 USA		Billing Address: 123 Main Street Anytown, CA 12345 USA
<input type="button" value="Edit Customer Record"/>		<input type="button" value="Edit Payment Source"/>
Transaction Details		
Type: Charge		
Amount: \$10.00 USD		
Transaction to be processed through merchant account		
<div style="border: 1px solid black; padding: 2px;"> processed through merchant account processed through merchant account authorized and saved for delayed capture saved for processing at a later time settled manually </div>		
<input type="button" value="Submit"/> <input type="button" value="Reset"/> <input type="button" value="Cancel"/>		

At a later time, you should complete previously authorized transaction by clicking “Capture” button on the Transaction Inspector page next to “Actions”. Capture initiates the second phase of delayed transaction processing - settlement through your payment gateway processor:

Search	Summary	Inspector
Charge Transaction Details #700217455020000419		
Customer: John Doe	Originated: 02/07/2005 03:44 PM MST	
Amount: \$10.00 USD	Completed: 02/07/2005 03:44 PM MST	
Status: Charge - Authorization Completed	Reference: V63A74842423	
Notes: Approved		
TEST MODE - Transaction with no Monetary Value		
Payment Source		
Card Holder Name: John Doe		
Credit Card Number: **** * 1111 (VISA)		
Expiration Date: 02/10		
Billing Address: 123 Main Street Anytown, CA 12345 USA		
Actions:	<input type="button" value="Capture"/>	<input type="button" value="Delete Test Transaction"/> <input type="button" value="New Reference Transaction"/>

Entering Payments for New Appointments

All schedules on your AppointmentQuest Online Appointment Scheduler account that have been configured to require customer cards and appointment fees for internal appointments present intermediate “Payment” tab on the “Make Appointment” page. You need to enter customer’s card information on this page in order to proceed to appointment confirmation:

Step 1: Select Schedule		Step 2: Setup Appointment	
Chair Massage in February 2005 for John Doe			
Date & Time >	Customer >	Payment >	Confirm
Selected Date & Time: Monday, February 07, 2005 at 04:00 PM - 05:00 PM MST			
Appointment registration fee: \$25.00 USD			
Customer Credit Card Information			
Card Type:	VISA	VISA 4111 **** * 1111	
Card Holder Name:	John Doe	Enter Another Card	
Credit Card Number:	4111 1111 1111 1111		
Expiration Date:	02 / 2010		
Billing Address:	123 Main Street		
	Anytown	CA	12345
	United States		
Proceed		Cancel	

After entering customer’s card information, click on “Proceed” button to review the appointment:

Step 1: Select Schedule		Step 2: Setup Appointment	
Chair Massage in February 2005 for John Doe			
Date & Time >	Customer >	Payment >	Confirm
Selected Date & Time: Monday, February 07, 2005 at 04:00 PM - 05:00 PM MST			
Customer Contact Information		Customer Credit Card	
Name:	John Doe	Card Type:	VISA
E-mail:	(not on file)	Card Holder Name:	John Doe
Daytime Phone:	(555) 321-5476	Credit Card Number:	**** * 1111 (VISA)
Evening Phone:	(not on file)	Expiration Date:	02/10
Address:	123 Main Street Anytown, CA 12345 USA	Billing Address:	123 Main Street Anytown, CA 12345 USA
Edit Customer Record		Edit Payment Source	
Payment Transaction Details			
Registration Charge to be	processed through merchant account	Amount:	\$25.00 USD
TEST MODE - Transaction with no Monetary Value			
Make Appointment		Cancel	

On this page, you can override the total amount for the payment by changing “Amount” filed value. For example, if the customer is eligible for a discount, you may lower the payment amount to match the discount.

Payment Transaction Details		
Registration Charge to be	<input type="text" value="processed through merchant account"/>	Amount: <input type="text" value="\$25.00"/> <input type="text" value="USD"/>
TEST MODE - Transaction with no Monetary Value		

IMPORTANT: By setting payment amount to zero (\$0.00) you can bypass the payment altogether. However, you need to be aware the following condition:

1. If you change the amount to zero (\$0.00) and leave Registration Charge processing option as “to be processed through merchant account”, or “to be authorized and saved for delayed capture”, AppointmentQuest Online Appointment Scheduler will perform card validation procedure on the customer’s card (please see previous chapter for more information on card validation).
2. If you do not want to validate customer’s card at this time, but would like to bypass the payment anyway, please make sure to select either “saved for processing at a later time” or “to be settled manually” option for the Registration Charge. In this case, AppointmentQuest Online Appointment Scheduler will not perform card validation.

Once you have scheduled the appointment, confirmation page will display the reference to the payment transaction under “Payment Transactions” section:

Confirmation	
Appointment Details	
Customer: John Doe	Date: Monday, February 07, 2005
Schedule: Chair Massage	Time: 04:00 PM - 05:00 PM MST
Status: Confirmed	Confirmation: 3020021444
Actions: <input type="button" value="Cancel"/> <input type="button" value="Reschedule"/>	
Payment Transactions	
V64A74842623	02/07/2005 Test Mode - No Monetary Value Registration Charge Completed \$25.00 USD
Customer Contact Information	
Name:	John Doe
E-mail:	(not on file)
Daytime Phone:	(555) 321-5476
Evening Phone:	(not on file)
Address:	123 Main Street Anytown, CA 12345 USA
<input type="checkbox"/> Customer Online Access Credentials <input type="checkbox"/> Customer Credit Card Information <input type="checkbox"/> Customer Rating / Appointment History <input type="checkbox"/> Customer Payments / Transaction Summary	
<input type="button" value="Edit Customer"/> <input type="button" value="Export to My Contacts"/>	
<input type="button" value="Print Detail Style"/> <input type="button" value="Export to My Calendar"/>	

You may click on the transaction reference number or transaction amount to inspect the transaction in Transaction Terminal. You can use Transaction Terminal to perform further actions on the transaction, such as issue credits or create new reference transactions.

Entering Payments for Rescheduled Appointments

All schedules on your AppointmentQuest Online Appointment Scheduler account that have been configured to require appointment rescheduling fee for internal appointments present Customer Credit Card Information Form on the Reschedule Appointment page.

If there is a valid credit card record on file for the customer, it will be pre-selected. Otherwise, you need to enter customer's credit card information in order to complete rescheduling:

Reschedule

Appointment Details			
Customer: John Doe	Date: Monday, February 07, 2005		
Schedule: Chair Massage	Time: 04:00 PM - 05:00 PM MST		
Status: Confirmed	Confirmation: 3020021444		

Reschedule As	
Date & Time: Monday, February 07, 2005 05:00 PM - 06:00 PM MST	
Schedule: Chair Massage	
Customer Credit Card Information	
Card Type: VISA	VISA 4111 **** * 1111
Card Holder Name: John Doe	Enter Another Card
Credit Card Number: 4111 1111 1111 1111	
Expiration Date: 02 / 2010	
Billing Address: 123 Main Street	
Anytown, CA 12345	
United States	
Rescheduling Charge to be processed through merchant account	
Amount: \$15.00 USD	
TEST MODE - Transaction with no Monetary Value	
Save	Reset
Cancel	

You can override the amount for the rescheduling fee by changing value in the "Amount" field.

IMPORTANT: By setting payment amount to zero (\$0.00) you can bypass the payment altogether. However, you need to be aware the following condition:

1. If you change the amount to zero (\$0.00) and leave Rescheduling Charge processing option as "to be processed through merchant account", or "to be authorized and saved for delayed capture", AppointmentQuest Online Appointment Scheduler will perform card validation procedure on the customer's card (please see previous chapter for more information on card validation).
2. If you do not want to validate customer's card at this time, but would like to bypass the payment anyway, please make sure to select either "saved for processing at a later time" or "to be settled manually" option for the Rescheduling Charge. In this case, AppointmentQuest Online Appointment Scheduler will not perform card validation.

Entering Payments for Appointment Cancellations

All schedules on your AppointmentQuest Online Appointment Scheduler account that have been configured to require appointment cancellation fee for internal appointments present Customer Credit Card Information Form on the Confirm Cancellation page.

If there is a valid credit card record on file for the customer, it will be pre-selected. Otherwise, you need to enter customer's credit card information in order to complete appointment cancellation:

Confirm Cancellation

Are you absolutely sure you want to cancel appointment with John Doe on 02/07/2005?

[Cancellation fee of \$10.00 per appointment is required]

Customer Credit Card Information	
Card Type: <input type="text" value="VISA"/>	VISA 4111 **** * 1111
Card Holder Name: <input type="text" value="John Doe"/>	<input type="button" value="Enter Another Card"/>
Credit Card Number: <input type="text" value="4111 1111 1111 1111"/>	
Expiration Date: <input type="text" value="02"/> / <input type="text" value="2010"/>	
Billing Address: <input type="text" value="123 Main Street"/>	
<input type="text" value="Anytown"/> , <input type="text" value="CA"/> <input type="text" value="12345"/>	
<input type="text" value="United States"/>	

Cancellation Charge to be

Amount:

TEST MODE - Transaction with no Monetary Value

On this page, you can override total payment amount by changing "Amount" filed value.

IMPORTANT: By setting payment amount to zero (\$0.00) you can bypass the payment altogether. However, you need to be aware the following condition:

1. If you change the amount to zero (\$0.00) and leave Cancellation Charge processing option as "to be processed through merchant account", or "to be authorized and saved for delayed capture", AppointmentQuest Online Appointment Scheduler will perform card validation procedure on the customer's card (please see previous chapter for more information on card validation).
2. If you do not want to validate customer's card at this time, but would like to bypass the payment anyway, please make sure to select either "saved for processing at a later time" or "to be settled manually" option for the Cancellation Charge. In this case, AppointmentQuest Online Appointment Scheduler will not perform card validation.

Issuing Credits

You can issue a credit on any completed charge transaction in Transaction Terminal. Locate the transaction to be credited, and bring it up in the Transaction Inspector page. From there, click on the “Credit” button in the middle of the page, next to “Actions”:

Search	Summary	Inspector	
Registration Charge Transaction Details #700217455020000617			
Customer:	John Doe	Originated:	02/07/2005 03:50 PM MST
Amount:	\$25.00 USD	Completed:	02/07/2005 03:50 PM MST
Status:	Registration Charge - Completed	Reference:	V64A74842623
Notes:	Approved		
TEST MODE - Transaction with no Monetary Value			
Charged on appointment for John Doe on 02/07/2005 at 04:00 PM MST			<input type="button" value="Inspect"/>
Payment Source			
Card Holder Name:	John Doe		
Credit Card Number:	XXXX XXXX XXXX 1111 (VISA)		
Expiration Date:	02/10		
Billing Address:	123 Main Street Anytown, CA 12345 USA		
Actions:	<input type="button" value="Credit"/>	<input type="button" value="Delete Test Transaction"/>	<input type="button" value="New Reference Transaction"/>

Original transaction information will be loaded automatically. Credit transactions need to be processed through the same payment gateway processor as originals. Transaction reference is required. Click “Submit” button to submit credit transaction to the payment gateway processor:

Select Customer >	Payment Source >	Enter Transaction	
New Transaction for John Doe			
Customer Contact Information		Payment Source Information	
Name:	John Doe	Card Type:	VISA
E-mail:	(not on file)	Card Holder Name:	John Doe
Daytime Phone:	(555) 321-5476	Credit Card Number:	XXXX XXXX XXXX 1111 (VISA)
Evening Phone:	(not on file)	Expiration Date:	02/10
Address:	123 Main Street Anytown, CA 12345 USA	Billing Address:	123 Main Street Anytown, CA 12345 USA
<input type="button" value="Edit Customer Record"/>		<input type="button" value="Edit Payment Source"/>	
Transaction Details			
Type:	Registration Credit		
Amount:	\$25.00	USD	
Transaction to be:	processed through merchant account		
Advanced			
Merchant Account:	Verisign Payflow PRO		Both merchant account and original transaction reference are required for credit transactions, but otherwise are optional
Transaction Reference:	V64A74842623		
TEST MODE - Transaction with no Monetary Value			
<input type="button" value="Submit"/>		<input type="button" value="Reset"/>	<input type="button" value="Cancel"/>

When processed, credit transaction will be added to the list of reference transactions on the original transaction in Transaction Terminal:

Search	Summary	Inspector
Registration Credit Transaction Details: #700217455020000716		
Customer: John Doe	Originated: 02/07/2005 03:51 PM MST	
Amount: (\$25.00 USD)	Completed: 02/07/2005 03:51 PM MST	
Status: Registration Credit - Completed	Reference: V64A74842662	
Notes: Approved		
TEST MODE - Transaction with no Monetary Value		
Credited on appointment for John Doe on 02/07/2005 at 04:00 PM MST		<input type="button" value="Inspect"/>
Payment Source		
Card Holder Name: John Doe		
Credit Card Number: **** * 1111 (VISA)		
Expiration Date: 02/10		
Billing Address: 123 Main Street Anytown, CA 12345 USA		
Actions:	<input type="button" value="Delete Test Transaction"/>	<input type="button" value="New Reference Transaction"/>
Reference Transactions		
02/07/2005 03:50 PM MST \$25.00 USD Registration Charge - Completed		02/07/2005 03:51 PM MST (\$25.00 USD) Registration Credit - Completed

If the credit has been issued for the payment transaction associated with an appointment, then Appointment Inspector page will display the reference to the credit transaction as well:

Workarea	Summary	Inspector
Appointment Details		
Customer: John Doe	Date: Monday, February 07, 2005	
Schedule: Chair Massage	Time: 04:00 PM - 05:00 PM MST	
Status: Confirmed	Confirmation: 3020021444	
Actions:	<input type="button" value="Cancel"/>	<input type="button" value="Reschedule"/>
Payment Transactions		
V64A74842623	02/07/2005 Test Mode - No Monetary Value	Registration Charge Completed \$25.00 USD
V64A74842662	02/07/2005 Test Mode - No Monetary Value	Registration Credit Completed (\$25.00 USD)
Customer Contact Information		
Name: John Doe		
E-mail: (not on file)		
Daytime Phone: (555) 321-5476		
Evening Phone: (not on file)		
Address: 123 Main Street Anytown, CA 12345 USA		
<input type="checkbox"/> Customer Online Access Credentials <input type="checkbox"/> Customer Credit Card Information <input type="checkbox"/> Customer Rating / Appointment History <input type="checkbox"/> Customer Payments / Transaction Summary		
<input type="button" value="Edit Customer"/>		<input type="button" value="Export to My Contacts"/>

Going Live

Once you have completed and tested your payment configuration in AppointmentQuest Online Appointment Scheduler, it is time to enable customer credit card payments in Live Mode.

Before You Go Live: Checklist

Before you proceed to taking your payment configuration into the Live Mode, please make sure that you have completed the following action items while your payment configuration in AppointmentQuest Online Appointment Scheduler is still in the Test Mode:

1. Configured and tested your merchant account(s).
2. Successfully completed integration tests with your payment gateway(s).
3. Tested appointment registration, rescheduling and cancellation payments.
4. Successfully tested credit transactions in Transaction Terminal.
5. Configured your payment gateway account(s) to be available in Live Mode.
6. Tested live transactions using merchant Web interface provided by your payment gateway processor.

To switch your AppointmentQuest payment configuration to **Live Mode**, please do the following:

1. Go to Account -> Setup Center -> Merchant Account Configuration -> Edit
2. Set "Transaction Mode" to "Live Mode"
3. Click "Save" to save your configuration settings

Merchant Configuration Editor

Master Settings

Payment Processing:	Enabled	Disable Payment Processing
Transaction Mode:	<input checked="" type="radio"/> Live Mode <input type="radio"/> Test Mode	

Card Types Accepted

American Express
 Diner's Club
 Discover
 JCB
 MasterCard
 VISA

Customer Receipts

Send e-mail receipts to customers on successful charge and credit transactions

Transaction Processing Fees

Option A

- Best value for processing transactions that are usually under \$100.00
- Transaction fee: \$0.50 + 2% of the transaction amount

Option B

- Cost-effective for transaction amounts in between \$100.00 and \$500.00
- Transaction fee: \$1.50 + 1% of the transaction amount

Option C

- Perfect when majority of transactions are over \$500.00
- Transaction fee: \$6.50 per transaction, flat rate

Transaction processing fees do not apply to test transactions

Save

Reset

Cancel

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