



# Working with Element Hosted Payments - PASS accounts

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Many Visual Anthology users find it necessary to save customer Credit Card information for a variety of reasons. However, due to recent changes to the PCI compliance laws doing this within your Visual Anthology system is impossible. The PASS Account add-on module takes advantage of Element Hosted Payment's secure server to provide an easy to use, secure solution to this issue.

Note: You may only one PASS account a customer.

## Setting up a PASS Account Tender

- Master Files → Tenders
- Choose F4 New
- Enter the name "PASS" press TAB
- The short code is auto generated
- On the Details → Tender Types choose PASS.

The screenshot shows a window with three tabs: 'List', 'Details', and 'Order'. The 'Details' tab is active. Below the tabs is a section titled 'Tender types' containing a list of radio button options: Cash, Credit card, In-house gift card, Account Sale, Gift certificate, Store credit, Deposit, FBC premium, Trade credit, PASS (selected), and Other.

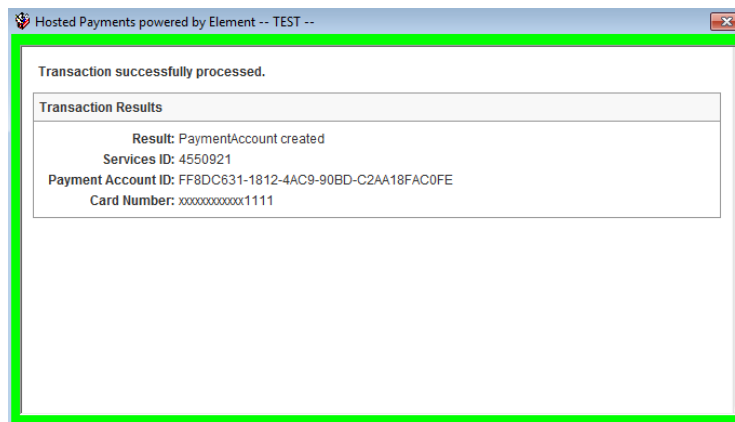
- Choose Bankable and ZTape Detail

The screenshot shows a list of configuration options with checkboxes: 'Allow change' (unchecked), 'Bankable' (checked), 'Ztape detail' (checked), 'Pop drawer' (checked), and 'Accept on web' (unchecked). The 'Bankable' checkbox is highlighted with a red dashed border.

- Choose F10 Save

## Setting up your Customer PASS Account

- With the Master Files → Customers screen open
- Choose the Actions menu. Near the bottom of the menu there will be a new item for PASS Account. This will have the following sub-options:
  - Create an Account
  - Delete the Account
  - Update
  - and Query the Account
- To store a customer's credit card information
  - Choose "Create an Account"
  - A screen much like the one used to authorize a Credit Card sale will display.
  - Enter the information as you would a Credit Card transaction
  - Choose Process the Transaction



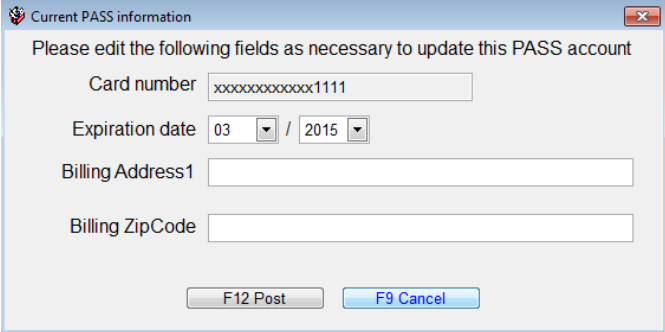
- An approval response is returned
- Result = "Payment Account Created"

## Completing a transaction using the PASS Account

- Open either your Cash Register or Customer Orders screen
- Choose the customer to associate the sale (a customer is required to use the PASS Account)
- Ring up the items the usual way
- Choose "Take Tenders"
- Select the PASS tender you just created
- If the customer you have associated with the this transaction has been assigned a PASS Account the transaction will complete as a usual except that you will not be prompted for any card information.

## Maintaining your PASS Accounts

- There are three options for maintaining your accounts. To access these options you must have
  - Opened the Master Files → Customers screen
  - Selected the Customer to maintain
  - Choose Actions
  - Query a PASS Account and Update a PASS Account have very similar screens. Shown below is Update screen.
    - Notice you can edit the fields for expiration date and Billing Address and Zip Code.
    - The Query screen shows the exact same information but you are not allowed to edit anything.



Current PASS information

Please edit the following fields as necessary to update this PASS account

Card number

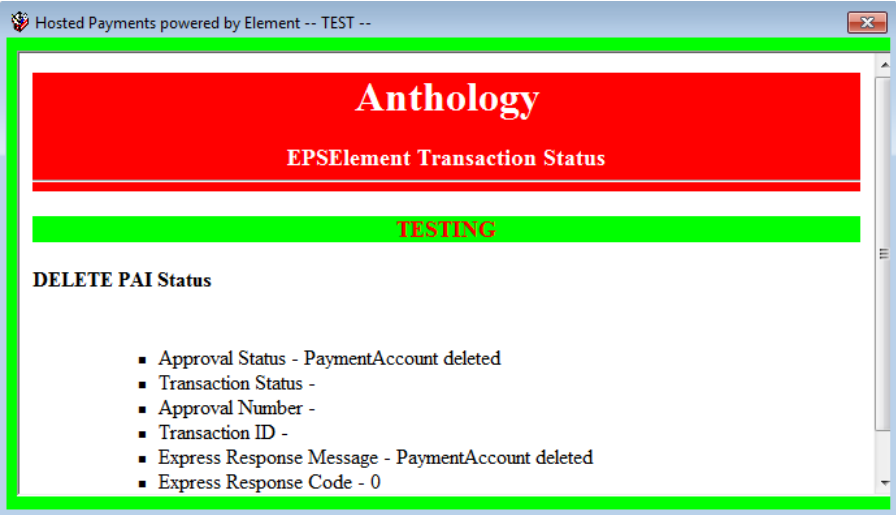
Expiration date 03 / 2015

Billing Address1

Billing ZipCode

F12 Post F9 Cancel

- Delete a PASS Account does just that. It sends a message to Element Hosted Payments that instructs them to delete the PASS account associated with this customer.



Hosted Payments powered by Element -- TEST --

**Anthology**

EPSElement Transaction Status

**TESTING**

**DELETE PAI Status**

- Approval Status - PaymentAccount deleted
- Transaction Status -
- Approval Number -
- Transaction ID -
- Express Response Message - PaymentAccount deleted
- Express Response Code - 0