

Linvio Swipe Terminal™

for  Appexchange



Credit Card Processing
for Salesforce

... Made Simple.

Version 1.0 Users Guide

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Linvio Swipe Terminal Overview

Linvio Swipe Terminal is an Adobe Air application that works with Linvio PaymentConnect for Salesforce and enables swipe entry of credit card information into a virtual terminal connected to PaymentConnect. This means you can process credit cards from a laptop or desktop computer at event, from a storefront or at customer locations, using PayPal or Authorize.net, and inserted into your business process using PaymentConnect.

One quick swipe of a card captures your customer's name, card number, expiration date, and card type – and with another click you can check to see if the contact is already in your Salesforce database. When you submit the transaction, everything is processed and recorded in Salesforce - new contacts, payment objects, payment status.

This user guide provides instruction for getting started with Linvio Swipe Terminal and scenarios for using the terminal with PaymentConnect and Salesforce.

System Requirements:

- Windows XP, Vista or 7 / Mac OS/X 10.5 or higher, and Adobe Air
- An IDTech Mini-Mag MagSwipe USB Card Reader. (IDMB-334133 series recommended)
- Salesforce Developer, Enterprise, or Unlimited Edition with Linvio PaymentConnect installed.
- PayPal Website Payments Pro or Authorize.net

Installation

This is an Adobe Air application and will require the installation of the Adobe Air runtime. Requires Linvio PaymentConnect v3.1 or higher and Salesforce. (Note: The Adobe Air installer may not run from Internet Explorer).

Download the installation package at: <http://linvio.com/swipeterminal.php>.



[Linvio Swipe Terminal \(Adobe Air - Mac/Windows\)](#) (938KB)



Click the link above to download and install the current beta version of Linvio Swipe Terminal. This is an Adobe Air application and will require the installation of the Adobe Air runtime. Requires Linvio PaymentConnect v3.1 or higher and Salesforce. (Note: The Adobe Air installer may not run from Internet Explorer)

Setup and Use

Following setup, run the Swipe Terminal application and enter your Salesforce username, password, and security token. Your Salesforce security token can be generated in Salesforce under Setup >> My Personal Information >> Reset My Security Token:

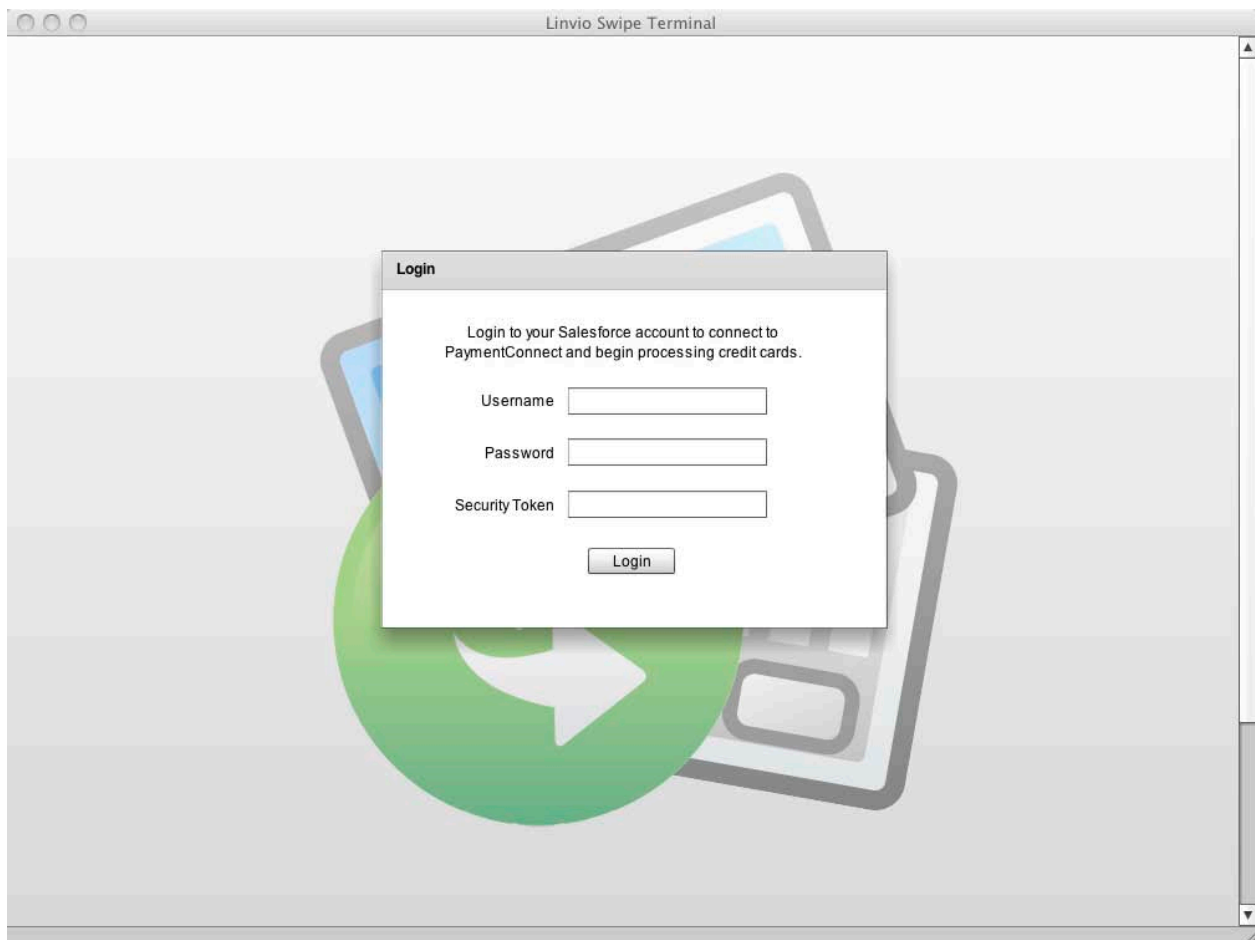


Figure 2. Swipe Terminal login screen

Configuration

To configure the terminal, click on the Settings tab.

Terminal Settings Log

Default Payment Name

Default Payment Amount

If you or your Salesforce administrator have set up workflow to trigger off of the "On Payment Completed" field of your payment records, you can set the default "On Payment Completed" value for transactions created through this swipe terminal using the field below:

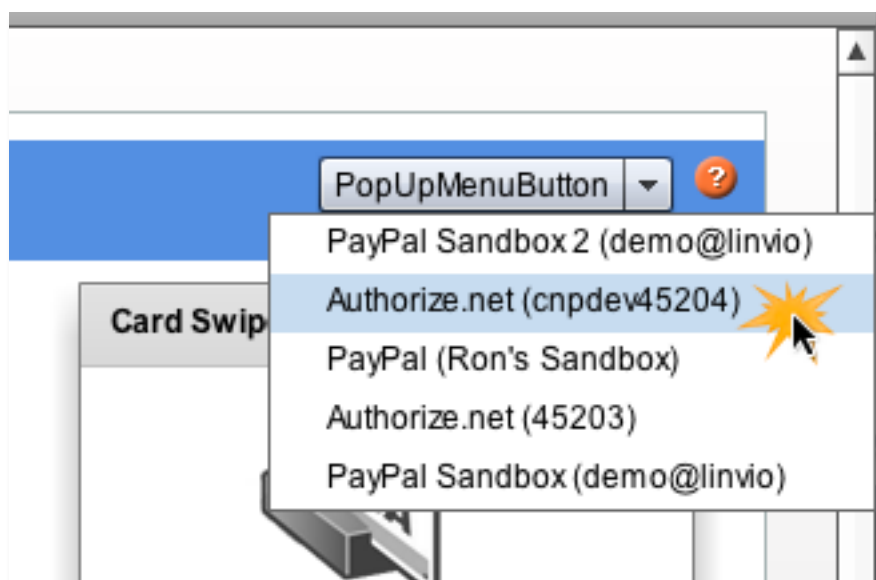
On Payment Completed Tag

The settings tab will display several text boxes:

- Default Payment Name – This will be the name of the payment that shows up in the payment record. This can be unique or tied to a shopping cart item in Salesforce.
- Default Payment Amount – the amount that will be charged in the payment
- OnPaymentCompleted Tag – user-defined tag used to control a custom workflow that will fire when the payment is completed. Note: this feature depends on customizations you define in your Salesforce account.

Note: Although these are the default settings, they can be changed before any transaction to reflect any name, amount and workflow that you choose.

Save these settings and return to the main "Terminal" tab.



Processor Connection – in the top right corner of the main processing page, a dropdown box will appear. Select the appropriate processor connection for this transaction.

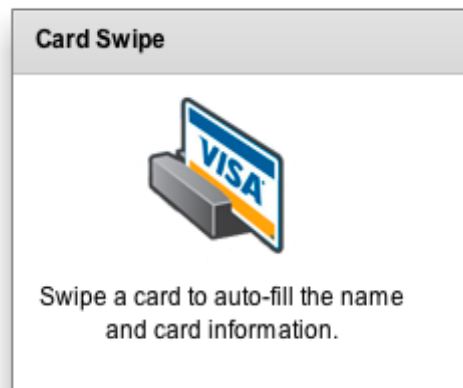
Running a Transaction

To process transactions, connect the swipe hardware (if you haven't already). When the main screen pops up, you can begin a payment process

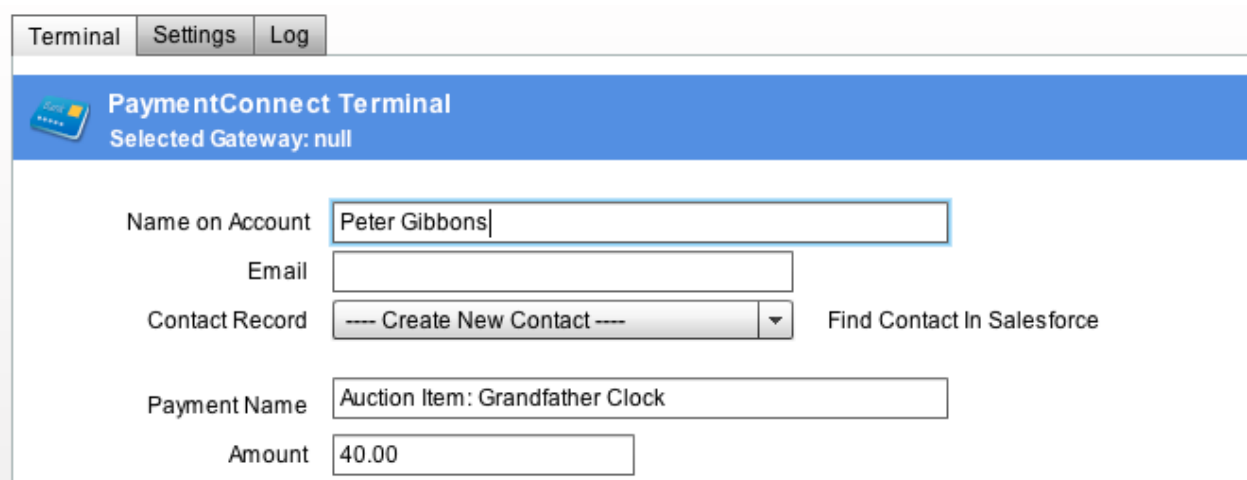
The screenshot shows the 'PaymentConnect Terminal' interface. The window title is 'Linvio Swipe Terminal'. The interface includes a menu bar with 'Terminal', 'Settings', and 'Log'. Below the menu bar is a blue header with 'PaymentConnect Terminal' and 'Selected Gateway: null'. The main area contains several form fields: 'Name on Account', 'Email', 'Contact Record' (with a dropdown for 'Create New Contact'), 'Payment Name', 'Amount', 'Shipping', 'Tax', 'Total Amount', 'Payment Type' (Credit Card, eCheck), 'Card Number', 'Credit Card Type' (Visa), 'Expiration Month', 'Year', 'CVW Code', 'Billing Address', and 'Shipping' address fields. A 'Card Swipe' pop-up window is visible on the right, showing a Visa card and the text 'Swipe a card to auto-fill the name and card information.' At the bottom are 'Submit Transaction' and 'Clear' buttons.

Figure 3. Swipe Terminal PaymentConnect terminal screen

Before you can process a transaction, you will need to click and highlight the “Card Swipe” icon box, located in the top right-hand corner of the screen. When this is colored and highlighted, you can swipe your card and initiate the payment process.



Swipe the card and Swipe Terminal will do a lookup into your Salesforce account for a matching account. If a match shows up, Swipe Terminal will automatically display the account information.



The screenshot displays the PaymentConnect Terminal interface. At the top, there are tabs for "Terminal", "Settings", and "Log". Below the tabs is a blue header bar with the "PaymentConnect Terminal" logo and the text "Selected Gateway: null". The main area contains a form with the following fields:

- Name on Account: Peter Gibbons
- Email: (empty)
- Contact Record: --- Create New Contact --- (dropdown menu)
- Payment Name: Auction Item: Grandfather Clock
- Amount: 40.00

There is a "Find Contact In Salesforce" button located to the right of the Contact Record dropdown.




Terminal Settings Log

PaymentConnect Terminal
Selected Gateway: null

Name on Account

Email

Contact Record Find Contact In Salesforce

Payment Name 

Amount

Shipping

Tax Tax % Apply tax to shipping

Terminal Settings Log

PaymentConnect Terminal
Selected Gateway: null

Name on Account

Email

Contact Record Find Contact In Salesforce

Payment Name

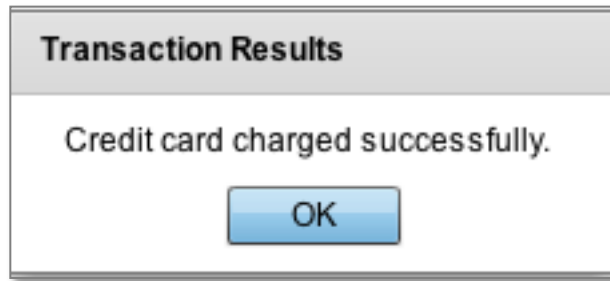
Amount

Shipping

When all settings look correct, click the "Submit Transaction" button at the bottom of the Swipe Terminal screen.

The screenshot displays a form with two main sections: **Billing Address** and **Shipping**. The **Billing Address** section includes radio buttons for **Mailing** (selected) and **Other**. Below this are input fields for **Address** (1234 Lumberg Dr.), **City** (San Diego), **State/Province** (CA), **Postal Code** (92117), and **Country** (US). A **Save changes to contact** link is positioned below these fields. The **Shipping** section is partially visible on the right, showing empty input fields for **Address**, **City**, **State/Province**, **Postal Code**, and **Country**. At the bottom of the form are two buttons: **Submit Transaction** and **Clear**. A yellow starburst icon with a mouse cursor is pointing at the **Submit Transaction** button.

If successful, a Transactions Results box will display a confirmation of the credit card charge:



Viewing the Results in Salesforce

After the payment has successfully occurred, you will find a new payment record in Salesforce under the "Payments" tab. Pull the dropdown box to display "Today's Payments" and the record should appear.

The screenshot shows the Salesforce interface for the "Payments" tab. At the top, there are navigation tabs: "Accounts", "Reports", "Dashboards", "Payments" (selected), "PaymentConnect Settings", "Payment Profiles", and "Products". Below the tabs, there is a "Today's Payments" dropdown menu with a card icon, and buttons for "New Payment", "Change Owner", and "Delete". Below this is a table with columns: "Action", "Payment Name", "Scheduled Pa", "Payment Date", "Amount", and "Contact".

<input type="checkbox"/>	Action	Payment Name ↑	Scheduled Pa	Payment Date	Amount	Contact
<input type="checkbox"/>	Edit Del	Auction Item: Grandfather Clock		3/26/2010	\$43.50	Peter Gibbons
<input type="checkbox"/>	Edit Del	Club Membership		3/26/2010	\$24.95	Bob Demo
<input type="checkbox"/>	Edit Del	Sched Payment 3.1833	3/26/2010	3/24/2010	\$25.00	Milton Waddams

In the payment record, you should see a Status entry of "Completed" and a record of the workflow that you specified in the settings tab in Swipe Terminal.

The screenshot shows a payment management interface for an auction item. The title is "Auction Item: Grandfather Clock". Below the title, there are navigation links: "Back to List: Payments" and "Related Payments". The "Payment Detail" section includes fields for Payment Name, Transaction Type, Payment Type, Amount (\$43.50), Currency ISO Code (USD), Scheduled Payment Date, Payment Date (3/26/2010), Status (Completed), Invoice Number, Transaction Id, and Payment Profile. The "Status" field is highlighted with a red box. Below this, there are sections for "Other Related Objects", "Tax & Fees", "Authorization", and "Memo". The "Payment Management" section contains buttons for "Capture", "Void", and "Refund", along with a "Submit" button and a "Capture Amount" input field. At the bottom, there is a "SendAuctionInvoice" button highlighted with a red box, and a "Merchant Custom Data" field.

Additional Help

For more information visit the Linvio website at www.linvio.com or our forum www.linvio.com/forum.

Consulting and integration services are also available from Linvio.

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