



Smart Pay Form Quick Reference Guide

Pace Payment Systems Contact Information

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For assistance with refunding/voiding a transaction or a service fee, email us munisupport@paceps.com. Please include the following information in your email.

- Merchant Account # or Name of Department
- Subject: Service Fee Refund/Void
- Date of Transaction
- Cardholder Name
- Transaction amount

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**Please note that if your city is leveraging Smart Pay Form through one of our integrated partners, some content may be pre-populated.*



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Initial Printer and Terminal Setup

1) Configure receipt printer settings:

Change the following settings in the primary web browser being used.
Example: In Internet Explorer, go to Tools, then Print, then Page Setup.

2) Register and Manage terminal:

This is a one-time process per web browser.

- **Workstation Name** can be any name used to identify the location of the device.
- **Device ID** must match the 8 digit Serial # on the bottom of the device. This is a one-time process per web browser.
 - Should the cookie get deleted, the terminal will need to be reselected from the “Manage Terminals” menu.



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Smart Pay Form EMV/Swiped Transaction

Payment Information Section:

- Enter information as requested on the form.

Payment Section:

- Enter payment amount in **Amount to Pay Field**.

*If a service fee is being assessed, the system will automatically calculate and display the amount. Please disclose Service Fee amount displayed to cardholder prior to proceeding with transaction.

* If a service fee is not being assessed, the **Service Fee Amount Field** will display \$0.00.

Select Swipe Card:

- Visa, MasterCard, Discover are defaulted payment types

American Express is available by request

Credit Card Information Screen:

- The screen will display the Terminal Serial Number and Link ID that will display on the terminal

- **Move to terminal to complete transaction**

*Do NOT click **Continue** until transaction is completed on the terminal.*

The screenshot shows the 'City Payment EMV transaction' screen. At the top left is the City of Anytown, NY State, USA logo. The title is 'City Payment EMV transaction'. Below the title is a red horizontal line. The main section is titled 'Payment Information' and contains three numbered steps:

- 1 Information**: Includes 'Custom Field 1' with the value 'account number 123-456-789' and 'Custom Field 2' with the value 'customer name: smith'. A 'Manage Terminals' button is located below these fields.
- 2 Payment**: Includes 'Amount To Pay' with the value '\$ 1.00'. Below it are two rows: 'Service Fee Amount' with '\$ 0.00' and 'Total Amount' with '\$ 1.00'.
- 3 Credit Card Payment Type**: Includes two buttons: 'Manually Enter' and 'Swipe Card'.

The screenshot shows the 'Credit Card Information' screen. At the top is a red horizontal line. The main section is titled 'Credit Card Information' and contains one numbered step:

- 4 Swipe Credit Card**: Includes logos for VISA, MasterCard, AMEX, and DISCOVER. To the right is a lock icon and the text 'Secure server 128-bit encryption'. Below the logos is the text 'Using your EMV terminal (2L430524):' followed by a list of instructions: '1. Choose LinkID = 5pg-8658', '2. Swipe or Insert Card', and '3. When finished, click the continue button below'. A 'Continue' button is located at the bottom.



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Go to Terminal:

- Screen will display “Press Enter to Start, Ready”. Press the green **Enter** key on the terminal keypad.
- The transaction with the total amount will display.
- Press the green Enter key to select the transaction.
- Proceed to Insert, Swipe, or Press **Enter** to manually key.

➤ EMV/Chip Transaction:

- Once the card is inserted the terminal will display “please do not remove” along with an icon at the top indicating it is reading the chip.
- The terminal will prompt to “Remove Card” and beep until the card is removed
- Terminal screen will briefly display “Authorizing transaction”.
- ***Once successful response is received return to Smart Pay Form.***

➤ Swipe Transaction:

- After swipe, screen will display “Authorizing Transaction” when successful.
- ***Once successful response is received, return to Smart Pay Form.***

Return to Smart Pay Form:

- Click **Continue** button

Credit Card Information Screen:

- Type *First Name* and *Last Name* on the card
- Click **Process Payment** and complete transaction

A screenshot of a terminal screen titled "Credit Card Information". At the top, it says "4 Swipe Credit Card". Below this are logos for VISA, MasterCard, AMEX, and DISCOVER. To the right, there is a lock icon and the text "Secure server 128-bit encryption". The form fields include: "Masked Card Number" with a value of "xxxxxxxxxxxx2208"; "Card Type" set to "MasterCard"; "Expiration" set to "4/17"; "First Name" set to "joe"; and "Last Name" set to "Smith" with a clear button (X) to the right. At the bottom, there is a blue button labeled "Process Payment".



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Payment Details Screen:

- **Print Receipt**
- Cardholder must sign “Merchant copy”.
- Provide cardholder the “Customer Copy”.

**City Payment
In-Person Transaction**

Payment Approved

Payment Details

City Payment
In-Person Transaction
25129 The Old Road, Suite# 222
Stevenson Ranch, CA 91381
(800) 555-5555
1/19/2016 4:42:58 PM

Auth Code: 200323
Transaction ID: 448569095
Reference ID: 580

Transaction Type: Credit Card
Card Type: MasterCard
Card Number: XXXXXXXXXXXXX2208
Name:
Amount: \$1.00

[Print Receipt](#) [New Payment](#)

Click **Make New Payment** to begin another transaction.

City Payment
In-Person Transaction

25129 The Old Road, Suite# 222
Stevenson Ranch, CA 91381
(800) 555-5555

1/19/2016 4:42:58 PM

Auth Code: 200323
Transaction ID: 448569095
Reference ID: 580

Transaction Type: Credit Card
Card Type: MasterCard
Card Number: XXXXXXXXXXXXX2208
Name:
Amount: \$1.00

I authorize the merchant to charge my credit card for the amount listed above. I understand that my card will be charged \$1.00 and my credit card statement will show this charge as from City of Anywhere Utility Payment. By signing below I acknowledge and agree to all of the terms listed above.

X _____

Merchant Copy



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Manually Enter a Transaction

Payment Information Section:

- Enter information requested for each Custom Field listed

Payment Section:

- Enter payment amount in **Amount to Pay Field**.
- If a service fee is being assessed, the system will automatically calculate and display the amount. Otherwise, the **Service Fee Amount Field** will display \$0.00.

Credit Card Payment Type:

- Select **Manually Enter**.

Cardholder Information Section:

- Enter *First Name* and *Last Name* on the card.
- Enter complete *Billing Address* information.

All fields above are required when transactions are being key entered

Manually Enter Credit Card Information:

- Enter 16 digit *Credit Card Number*.
- Enter 3-4 Digit *CCV Code*.
- Enter *Expiration Month* and *Expiration Year*.

All fields above are required to complete the transaction

Click the **Process Payment** button

Payment Details Screen:

- **Print Receipt**
- Cardholder must sign “Merchant copy”.
- Provide cardholder the “Customer Copy”.

The screenshot displays the 'City Payment In-Person Transaction' form. It is divided into three main sections:

- 1. Information:** Includes fields for 'Email address' (joesmith@paceps.com), 'Custom Field #1' (account number 123-456-789), and 'Custom Field #2' (customer name: smith). A 'Manage Terminals' button is present.
- 2. Payment:** Includes 'Amount To Pay' (\$ 51.50), 'Service Fee Amount' (\$ 0.00), and 'Total Amount' (\$ 51.50).
- 3. Credit Card Payment Type:** Features 'Manually Enter' and 'Swipe Card' buttons.
- 4. Cardholder Name and Address:** Includes fields for 'First Name' (Joe), 'Last Name' (Smith), 'Address 1' (123 Pinecrest Lane), 'Address 2' (Optional), 'City' (Anywhere), 'State' (California), and 'Zip / Postal Code' (91381). There is a checkbox for 'Outside the United States'.
- 5. Manually Enter Credit Card Information:** Includes logos for VISA, M/C, AMEX, and DISCOVER. Fields for 'Card Number' (5454545454545454), 'CCV' (111), 'Expiration Month' (1 - January), and 'Expiration Year' (2016). A 'Process Payment' button and a 'Secure server 128-bit encryption' icon are also visible.

Click **Make New Payment** to begin another transaction.



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Process a Refund or Void

1. To ensure a refund is being processed for the correct transaction, verify the following information on the original transaction:
 - a. Cardholder Name
 - b. Date of the transaction
 - c. Card Type and Last 4 digits of the Credit Card
2. When you log in, ensure you are viewing the correct Account ID and Sub ID on the top Menu.

ACCT ID: PADMO Sub ID:
Demo Account – 866-636-3553

3. Click **Transaction Search** from the Transactions Menu on the left hand side of your screen.

Pace Payments

Transactions

- CC Settlement Batches
- Chargeback Report
- Order Manager
- Process Batch Report
- Reporting Emails
- Transaction Search

Reporting

- Report Scheduler
- Transaction Report

User Menu

- Change Your Password
- Edit Home Page



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4. The easiest way to locate the transaction is by searching by Name on the credit card and the Date of the Transaction. Note: change the Matching to “Partial Match”

Search by Name or Email Address	
Consumer Name:	<input type="text" value="Paul"/> <input type="radio"/> Exact match <input checked="" type="radio"/> Partial Match (wildcard search)
Email Address:	<input type="text"/>
Amount Range:	From <input type="text"/> to <input type="text"/>
Date Range: *	<input type="text" value="05/01/2015"/> Start Date <input type="text" value="05/05/2015"/> End Date <small>Limited to a 3 month period in the last 24 months.</small>
Include Child SubID's:	<input checked="" type="checkbox"/> Yes
<input type="button" value="Search"/>	

5. The results will give you information about the transaction. Confirm that the name, card type and last 4 digits of the card match the information related to the transaction amount.

Transaction Results 6 Records Found							
Nbr.	Amount	OrderID	Merchant Nbr	Consumer	Pay Type	Description	Card Number or Acct Nbr / Routing Nbr.
	SubID	TransactionID	UserID/Created By	Account	Date / Time		Result / Message
1	\$ 1.00	285069690		Paul J Christians	MasterCard	AVS Sale	XXXXXXXXXXXX5454 04/2015
	SPF01	394636127	SOAP	Paul J Christians	Apr 23 2015 01:36PM		Approved : Receipt : TEST::394636127::M

6. Click on the 9 digit Order ID #. It is a hyperlink that will take you to the Order Screen:
7. If the transaction was done the same day, select **Issue Void Transaction**. If the transaction was done the prior to same day, select **Issue REFUND** for.
- *Do not change the amount being refunded as it should offset the original transaction.*
8. Click **Update Order**.

Order Number: 285069690			
Date Placed	04/23/2015 13:36:19 (Z3MAIN)	Date Last Modified	04/23/2015 13:36:19 (Z3MAIN)
Total Amount	us dollar (\$) 1.00	Status	Completed
Order Comments	<input type="text"/>		
New Transaction Tasks <small>The following options allow you to create a new transaction based on the consumer information for this order. This transaction will be assigned a new Order ID. Note that these options do not apply to PIN-Debit transactions.</small> <input type="radio"/> Issue New Sale <input type="radio"/> Issue New Credit		Order Information Tasks <small>The following options allow you to enter data for record-keeping purposes, but they do not change or update the transaction</small> <input checked="" type="radio"/> Update Order Comments Only <input type="radio"/> Change Order Status to Completed <input type="radio"/> Record Charge Back for \$ <input type="text" value="0.00"/>	
Existing Transaction Tasks <small>The following options allow you to update an existing transaction.</small> <input type="radio"/> Issue Post Transaction for \$ <input type="text" value="1.00"/> (credit card only) <input checked="" type="radio"/> Issue Void Transaction <input checked="" type="radio"/> Issue Refund for \$ <input type="text" value="1.00"/> <input type="radio"/> Voice Authorization Capture (credit card only) <input type="radio"/> Add Account Number to Negative Account Blocking			
<input type="checkbox"/> Wave Transaction			
<input type="button" value="Update Order"/>			

Note: Transaction status can only be updated or changed if the original transaction is less than 120 days old. After 120 days, please use the Virtual Terminal menu.

Transaction History							
Nbr.	Processed Amount	OrderID	Merchant Nbr	Consumer	Pay Type	Description	Card Number or Acct Nbr / Routing Nbr.
	SubID	TransactionID	UserID/Created By	Account	Date / Time	Requested Amount	Result / Message
1	\$ 1.00	285069690		PAUL J CHRISTIANS	MasterCard	AVS Sale	545454XXXXXXXX5454
	SPF01	394636127	SOAP	PAUL J CHRISTIANS	Apr 23 2015 01:36PM	us dollar (\$) 1.00	Approved : Receipt : TEST::394636127::M



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9. A successful confirmation with authorization number will appear once **Refund** or **Void** is processed:

Credit back/refund successful

Auth: CREDIT:TEST:::398102872:::

10. Click **Back to Order Detail** and you will see the original transaction and the Refund that was just processed.

Transaction History							
Nbr.	Processed Amount	OrderID	Merchant Nbr	Consumer	Pay Type	Description	Card Number or Acct Nbr / Routing Nbr.
	SubID	TransactionID	UserID/Created By	Account	Date / Time	Requested Amount	Result / Message
○ 1	\$ 1.00	285069690		PAUL J CHRISTIANS	MasterCard	AVS Sale	545454xxxxxx5454
		SPFD1	394636127	SOAP	PAUL J CHRISTIANS	Apr 23 2015 01:36PM	US dollar (\$) 1.00 Approved : : Receipt : TEST:::394636127::N::M
○ 2	\$ 1.00	285069690		PAUL J CHRISTIANS	MasterCard	Credit Back	545454xxxxxx5454
		SPFD1	398102872	PACE-SSanchez	PAUL J CHRISTIANS	May 13 2015 03:38PM	US dollar (\$) 1.00 Approved : : Receipt : TEST:::398102872:::