

Verifying Your Payment Processor Setup

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This guide explains how to verify that your integration with your payment processor is connected correctly. It is intended for system administrators.

After setting up your account with your payment processor, you should conduct the following three tests to verify the connection. From a user's perspective, some of the tests might look identical; however, each one submits a different request to the payment processor.


The tests require an *active* credit card; however, the card does *not* need to be from one of your actual customers. We recommend that you use one of your own credit cards, then delete the CC alias that will be stored in your aACE system.


Preparing to Test

Before running the tests, double-check your integration settings to make sure the flag to 'Save card for future use' is *marked*. If you do not need to securely store aliases for customer cards, you can clear this flag after the tests.

Test 1: Create a Credit Card Alias from the Companies Module



This test involves creating a payment alias, then deleting it.

1. At the **Companies** module, select a company for the test.
Note: This does not have to be a customer. It can be your organization's company record.
2. At the detail view, navigate to the **Finance & Accounting** tab.
3. In the **Payment Accounts** section, click the **Add** icon ().
4. At the dialog, click **Credit**.
5. At the Process Payment dialog, enter the required payment details:
 - Total Amount — Entered automatically and cannot be edited
The amount depends on which payment processor your system is configured for:
 - Global Payments Integrated — \$0.00
 - Payment Innovators — \$0.00
 - Card Number
 - Expiry Date

- CVV
 - Any additional information needed for your payment processor
6. Click **Make Payment**.
The Transaction Result shows that the alias was created successfully.
 7. At the Customer Details tab again, click **Edit**.
 8. For the alias that was created, click **Actions** () > **Delete** > **Delete**.
 9. Click **Save**.

Test 2: Create a Credit Card Alias from the Order Module


This test involves completing a payment, then voiding the receipt. If you are using a [CC payment peripheral device](https://aace6.knowledgeowl.com/help/considerations-and-peripherals-for-mobile-apps) (e.g. your chip reader, magnetic swiper, or manual entry station), make sure it is connected before starting.

1. At the **Orders** module, create a test order for one of your customers with a \$1.00 amount and no additional charges, then click **Save** and **Open**.
2. Next to Payment Due, click the **Add** icon ().
3. At the Enter Payment dialog, mark the payment method flag for **Credit Card**.
4. At the Credit Card field, click the **Add** icon (), then enter the required payment details:
 - Total Amount – Entered automatically from the order and cannot be edited
 - Card Number
 - Expiry Date
 - CVV
 - Any additional information needed for your payment processor
5. Click **Make Payment**.

After you complete this test, go to the Receipts module and locate the receipt generated by the CC payment. At the detail view of that receipt, click **Actions** > **Void Receipt**. This restores the balance on the test order so you can use it again.

Test 3: Use a Stored Credit Card Alias


Before you begin this test, make sure that the receipt from the previous test has been voided.

1. At the **Orders** module, locate the \$1.00 test order you created.
2. Next to Payment Due, click the **Add** icon () again.

3. At the Enter Payment dialog, mark the payment method flag for **Credit Card**.
4. Click in the Credit Card field, then select *the alias* that was saved for the card you used before.
5. Click **Apply Payment**.

Completing the Test Process

To finish testing, remove the test alias from the company record:

1. At the **Companies** module, select the company you used for the test.
2. At the detail view, navigate to the **Finance & Accounting** tab.
3. Click **Edit**, then at the new Account Number alias, click **Actions** () > **Delete**.
This removes the card from the payment processor's servers; however, because the card has been used, a voided and unusable record will persist in aACE. In other words, part of the alias will remain, but users will *not* be able to use it on any transactions.

Note: If needed for your system, also clear the integration settings flag to 'Save card for future use'.
