

Setting Up Payment Innovators

Last Modified on 07/25/2024 6:18 pm EDT

This guide explains how to set up your integration with Payment Innovators.

Contact Payment Innovators

The first step for integrating your aACE system with Payment Innovators is to [contact a Payment Innovators support representative](https://www.cognitoforms.com/PaymentInnovators/aACEStartToday) for a quote. This can be done by visiting the [Payment Innovators website](https://pipayapp.com/partners/aace/) and filling in the [form](https://www.cognitoforms.com/PaymentInnovators/aACEStartToday).

Alternatively, you can reach out directly by phone at 800-310-3880, or email at integration@paymentinnovators.com.

The representative will ask for a recent Merchant Statement, so have that ready.

Once the quote is approved, you will need to set up your account.

Your Payments Innovators rep will send you instructions, a reference number, and a schedule for an installation appointment with a member of the Payment Innovators team.

ACH Option

If you wish to receive payments via ACH, let the representative at PI and aACE Software know so your account will be configured appropriately.

Contact aACE Support

Once you have an installation appointment scheduled, your Payment Processing Integration file will need to be configured for the new installation.

Email us at support@aACEsoft.com for assistance in preparing for the new installation. You can also click “**Contact Us**” in the knowledge base header above to send us a support ticket. [Note: The email address you use to open a ticket will be the email address used within our help system to send you updates and responses.]

After [the aACE integration file](http://aace5.knowledgeowl.com/help/installing-integration-files) is installed or reconfigured, you will need to set a few other aACE preferences. For more details,

read [Overview of Other Preferences for Payment Processing](https://aace5.knowledgeowl.com/help/overview-of-other-preferences-for-payment-processing#PayProcessorTestMode) (<https://aace5.knowledgeowl.com/help/overview-of-other-preferences-for-payment-processing#PayProcessorTestMode>).

Then we recommend that you run a test to ensure the integration is working correctly.

Credit Card Fee Recovery

If you are planning to use the 'Pay Now' link and wish to add a Credit Card fee recovery, let the representative at PI and aACE Software know so your account will be configured appropriately. You will need to have a GL Account assigned for recording these items on your Invoices and Receipts.

[Read More about Managing your Credit Card Processor Fees.](https://aace6.knowledgeowl.com/help/managing-your-credit-card-processor-fees)

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[Read More about Charging Fees for Customer Payments.](https://aace6.knowledgeowl.com/help/charging-a-fee-for-customer-payments-made-with-a-credit-card) (<https://aace6.knowledgeowl.com/help/charging-a-fee-for-customer-payments-made-with-a-credit-card>)

Test Mode

aACE provides a Test feature so that prior to taking your Payment Innovators integration live, you can verify your credit card integration.

Prior to setting up your Payment Innovators integration, we can [set up aACE to run test transactions](https://aace6.knowledgeowl.com/help/working-with-test-mode-to-learn-about-credit-card-processing) (<https://aace6.knowledgeowl.com/help/working-with-test-mode-to-learn-about-credit-card-processing>) so you can explore how the integration works. Contact us to configure Test Mode.

Note: All testing should be done during the Discovery process, prior to your Go-Live date.

Live transactions will typically be ignored while a test mode is active, meaning that transactions could be lost. In addition, enabling test mode with *production* credentials will generate an error. And finally, if you have already set up an account and entered production credentials, entering test credentials will overwrite them; you would need to re-enter the production credentials.

Do *not* work with test mode after you have gone live unless you are specifically working in a test system with aACEsoft support.

Payment Innovators Tokens and Multiple Accounts

Payment Innovators creates account tokens for each terminal your organization requires. The number of account tokens you receive from Payment Innovators and the placement of those tokens will vary depending on how your business is set up.

Note: aACE enables you to have multiple accounts associated with different offices so that you can keep data siloed. Payment Innovators can also provide separate merchant identification numbers (MIDs) for each office/entity. However, you should only configure your Payment Innovators accounts this way if you're doing purely multi-office segregation and each office is a completely separate accounting entity.

If multiple accounts are a consideration for you, make sure to notify us so your settings will be appropriately configured.

Migrate Saved Cards from Global Payments to Payment Innovators

You may want to migrate your saved cards from you existing payment processor to Payment Innovators.

While this can not be done for all payment processors, some allow it. Global Payments is one that does, but at a cost. Our experience is that Global Payments charges around \$500 to export tokens and send them to Payment Innovators. This investment is, in our experience, rather quickly offset by Payment Innovator's competitive rates and enhanced features (e.g. unlocking the speed of payment in the 'Pay Now' feature set.)

The process takes around 24-48 hours, so that needs to be considered in scheduling the switch-over. During this time, new credit cards entered into Global Payments will not be included in the transfer and will need thereafter to be re-entered.

On the day you switch we'll turn off Global Payments and turn on Payment Innovators in the aACE Payment Processing integration file.