

Tech Tip Tuesday— February 24, 2015

by David Hirsch

Credit Card Processing

Sometimes our customers change their credit card credentials—sometimes just the password, but sometimes they change the processor. Even if you're not making any changes, you might want to think about adding an additional user to your PayPal PayFlow Pro account, so that Livery Coach has its own dedicated user (which can make it easier to identify transactions processed from Livery Coach and transactions processed outside the system).

Here are a few tips to handle this change yourself, along with what to be careful about when making the change.

If you navigate to Maintain...System Default Config, and select the Credit Card tab, you will see all your settings. Pay particular attention to the Partner, Vendor, User, and Password fields.

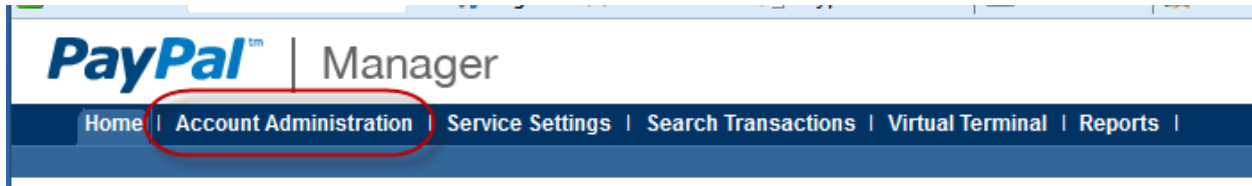
The screenshot shows the 'System Default Configuration' window with the 'Credit Card' tab selected. The 'PayPal' dropdown is set to 'PayPal'. The 'Credit Card Setup' section includes fields for Host (payflowpro.paypal.com), Port (443), and Time Out (Sec) (20). A red circle highlights the 'Partner' (cbs), 'Vendor' (LongCar11), 'User' (LiveryCoach), and 'Password' (*****) fields. Below these are checkboxes for 'View full credit card number without reauthentication', 'Clear All Pre-Authorizations', 'Bind Street/Zip', 'Bind Card Verification Value', and 'Display Message If Street/Zip or/and CVV2 is not matching on manual pre-auth.'. The 'Level 3 - Processor' is set to 'Paymentech'. There are input fields for 'Creditcard Pre-Authorization will be activated' (2) and 'or more Day(s) Advance Booking' (2). Checkboxes for 'In-House', 'Farm In', and 'Farm Out' are present. The 'Clear PNRRef if trip total < \$' field is set to 0000. The 'Payment Method Restriction' section lists various methods with checkboxes, including 'Payment Needed' which is checked. The 'Credit Card Save As (Separate By "I" not L)' field is set to 'Personal|Corporate|Corp Purchase|'. The 'Level2 Credit Card Setup' section has 'Enable Credit Card Validation' checked and 'Preauths last for' set to 5 days. The window title is 'Long Car Limousine' and the bottom bar shows 'Livery Network Office Hours Setup', 'Cancel', and 'OK' buttons.

These are the settings used to process credit cards through your system. Your processing partner (i.e. Century Business, Chosen Payments, or another partner of your choice) has already set up your initial credentials and provided them to you. If you are using the credentials that they provided, then the Vendor and User fields will be identical.

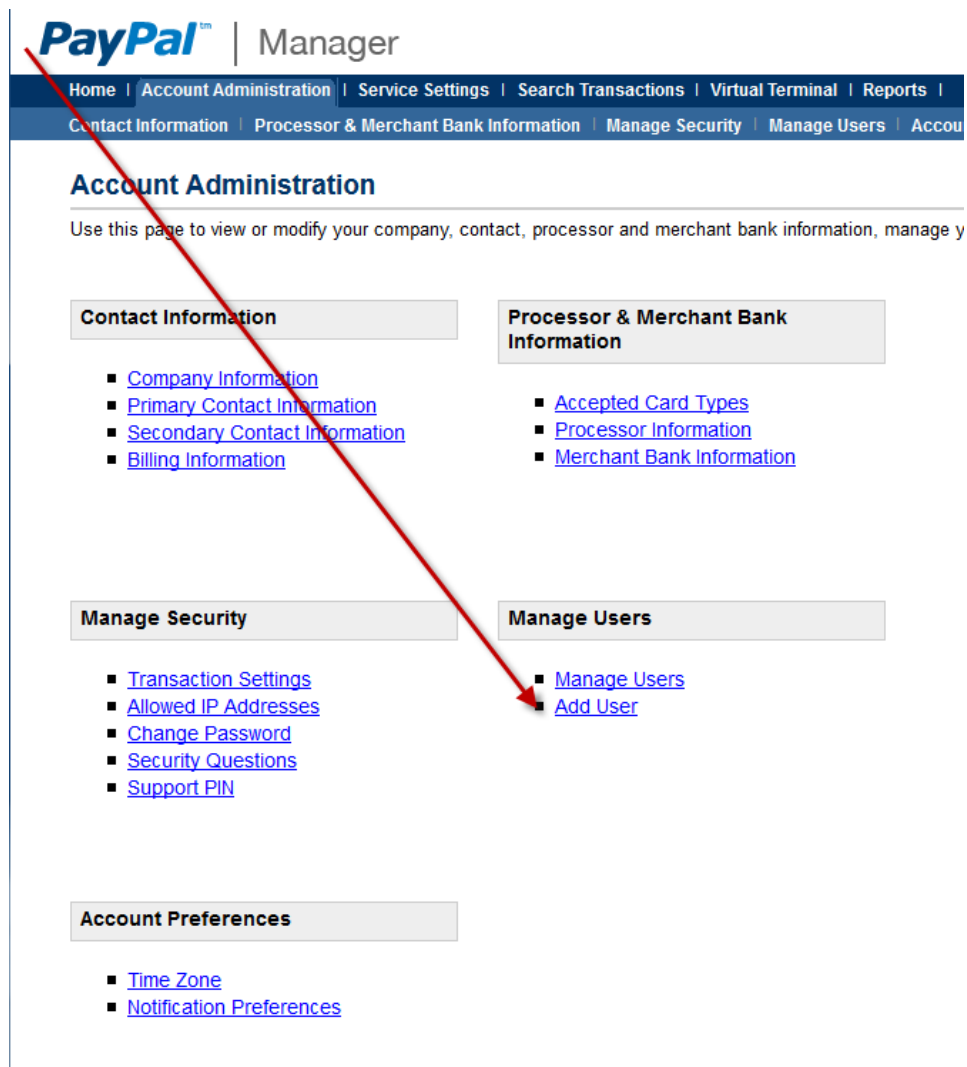
However, we suggest that rather than using the main administrative user that your processor set up for you, you set up a separate user just to process transactions from Livery Coach.

HOW TO SET UP A DEDICATED PAYPAL USER JUST FOR YOUR LIVERY COACH SYSTEM:

Log into your PayPal control panel (at <https://manager.paypal.com>). Once logged in, click on Account Administration.



Once there, click on "Add User". (If you want to see what users already exist, you can click on "Manage Users".)

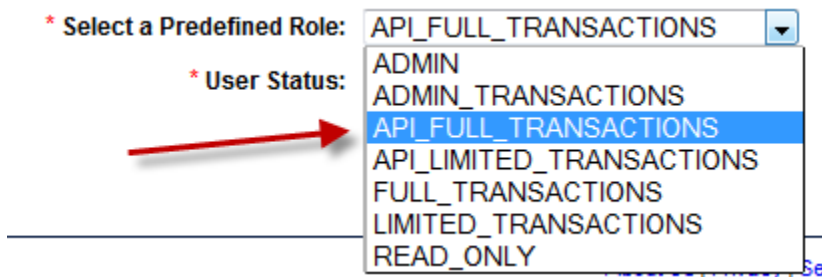


Once here, you will need to enter your Admin User Password again, and a Contact Name and Email for the new user (which can be your own, even if you have used it for your main user).

The screenshot shows the 'Add User' form in the PayPal Manager interface. The form is divided into several sections: 'Admin Confirmation', 'User Information', 'User Login Information', and 'Assign privilege to User'. The 'Admin Confirmation' section includes fields for 'Admin User' and '* Admin User Password'. The 'User Information' section includes fields for '* Contact Name', 'Phone', and '* Email'. The 'User Login Information' section includes fields for 'Partner', 'Merchant Login', '* User Login Name' (with the value 'LiveryCoach'), '* User Password', and '* Confirm User Password'. The 'Assign privilege to User' section includes a dropdown for '* Select a Predefined Role' (with 'API_FULL_TRANSACTIONS' selected) and a dropdown for '* User Status' (with 'Active' selected). There are 'Cancel' and 'Update' buttons at the bottom right.

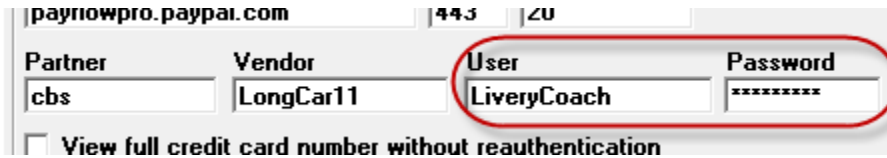
Create a new User Login Name and Password under User Login Information.

For the "Assign privilege to User" section, we recommend selecting "API_FULL_TRANSACTIONS" from the dropdown.



This setting means that Livery Coach would be able to do transactions and refunds, but if somehow someone got that userid and password, would NOT be able to actually log in to your PayPal control panel.

Once this is complete, double-check to make sure everything worked ok by navigating to “Manage Users”—and then go back to Livery Coach Maintenance—System Default Config and enter this new user and password into the proper fields as shown below:



Partner	Vendor	User	Password
cbs	LongCar11	LiveryCoach	*****

View full credit card number without reauthentication

Note that the Vendor field must stay the same (must match your main admin logon).

Also, if you are running multiple transportation companies in Livery Coach (multiple “Owners”), you need to do this for each Owner, since each of the companies has its own credit card integration fields.

IF YOU ARE CHANGING CREDIT CARD PARTNERS

If you are changing partners, your new partner will give you the master credentials for PayPal. You can set up a dedicated user as outlined above, and the put in the new Partner, Vendor, User, and Password.

CAUTION-- IF YOU DO PRE-AUTHORIZATIONS: any existing preauthorizations are tied to your (old) processor, and can not carry over. So if you do preauths, you will need to clear out the preauth fields on all the existing trips (note that this will not actually clear the preauths themselves—so potentially until the old ones expire your clients could see double preauths, meaning you are tying up twice as much of their money.)

To clear out all the preauth codes at once, simply click on the “Clear All Pre-Authorizations” button.



View full credit card number without reauthentication

Bind Street/Zip

Bind Card Verification Value

Display Message If Street/Zip or/and CVV2 is not matching on manual pre-auth.

If you contact Livery Coach support in advance of the switch-over, our support team will be happy to help walk you through the process, including turning off the automatic preauth function in your LCComm for a few days so you don’t have a lot of old preauths in the system just before the switch.