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LOGIN

The login page allows you to log into the software using either your Client ID or Username.

Username: either your numeric client ID or a clerk name given by an administrator can be used here

Password: the password must correspond to your username

Remember Me: check this box if you would like us to pre-populate the username field whenever the program is launched

Login: log in with the entered credentials
TRANSACTIONS

This is the main screen. From here you can process payments of various types.

The left-most series of buttons determines the transaction types you can process. Your menus may vary depending on what you have access to through your account.

- Credit Cards: process branded credit and debit cards
- Checks: process ACH payments using banking account information
- Gift Cards: process a transaction on a store-branded gift card (not a Visa or MasterCard gift card)
- Loyalty: process a loyalty card transaction

The next series will determine the transaction type you wish to process.

- Sale: most common transaction. Sale debits your customer’s card and adds the funds to your next batch
- Auth: the first part of a sale. This will determine that the funds are available from the issuer and hold them, but not add them to your batch
- Force: the second part of a sale. Force will complete an Auth by adding the transaction to the batch.
- Void: cancels a transaction and removes it from the batch. A Void must be done before the batch has closed.
- Credit: refund a customer. Issuing a credit will send money back to the cardholder’s bank. By default you must begin a credit from a previous sale (under search) and the amount must be less than or equal to the original sale amount.

**SWIPE/CHIP vs. KEYED**

If your account is set to retail, the software will default to Swipe/Chip. If your account is set to card-not-present the software will default to Keyed. If are on the Swipe/Chip screen and start typing in a card number you will be automatically switched to the Keyed screen. The Swipe/Chip screen only displays the fields required for card present, while the Keyed screen displays all optional fields.

If you are using Slim CD for PC in conjunction with a PIN pad, you can submit the transaction to the pad by pressing the submit button after entering an amount (and optionally an invoice number)

**TRANSACTION FIELDS**

- Amount (Required): the total amount to charge.
- Invoice #: optional field that can take up to 20 alphanumeric characters. Anything you put in this field will show up as the invoice number on all reports.
- Card Number (Required): the 15- or 16-digit card number. You can key the number in using a keyboard, or swipe/dip a card while the cursor is on this field.
- Expire Date (Required): the expiration date on the card.
- CVV2: the verification value on the back of most cards (Visa, MC, or Discover) or on the front of an AMEX.
- Name: the cardholder’s first and last name. These fields are not required nor verified by the issuer, but do show up on receipts and should be used if possible.
- Billing Street: the street address of the cardholder. This is verified by the issuer if entered and is recommended for keyed transactions.
- City: the billing city.
- State: the billing state.
- Billing Zipcode: the zip code of the cardholder. This is verified by the issuer if entered and is recommended for keyed transactions.
- Billing Country: the country the card was issued in.
- Phone Number: customer’s phone number. Informational only.
- Email Address: customer’s email address. This is used to send receipts via email.
- Ticket #: the unique ID of a previous transaction. Used for Void, Credit, and repeat customer Sales
- Allow Duplicates: overrides duplicate checking. By default Slim CD will deny a second transaction that has the same card number, amount, and invoice number. Select “yes” to pass through each transaction as new.
- Card Present: flag indicating that the card is present. Defaults to “yes” for retail merchants, “no” for card-not-present merchants.
SEARCH

THIS SCREEN IS USED TO SEARCH FOR PAST TRANSACTIONS. FROM HERE YOU CAN RE-PRINT A RECEIPT, OR SEND THE TRANSACTION INFORMATION BACK TO THE TRANSACTIONS SCREEN FOR VARIOUS USES. THE FILTERS AT THE TOP OF THE SCREEN ALLOW YOU TO NARROW DOWN YOUR SEARCH IN VARIOUS WAYS.

SEARCH FIELDS

- Start Date: earliest date to search for transactions.
- End Date: latest date to search for transactions.
- Ticket: search for a specific transaction by ticket number (will return only 1 result).
- Invoice: search for transactions with a specific invoice number.
- First Name: search for transactions with a specific first name.
- Last Name: search for transactions with a specific last name.
- Amount: search for transactions matching a specific amount.
- Last Four Digits: search for all transactions where the last four digits of the card number match your entry (use last 3 for AMEX).
SEARCH FILTERS

- Payment Type: show all transactions, or only a specific type (credit card, check, gift, or loyalty).
- Trans Type: show all transactions, or only a specific type (SALEs, VOIDs, CREDITs, etc.).
- Result: show all transactions, or only a specific status (approved, declined, error).
- Hide Voids: check to not show voids or voided transactions.

IF YOU DOUBLE-CLICK ON A TRANSACTIONAL RECORD, YOU WILL BRING UP THE DETAILS SCREEN FOR THAT TRANSACTION. FROM THIS SCREEN YOU CAN PERFORM CERTAIN ACTIONS

- VPOS: send this transaction’s information back to the transactions screen. From there you will be able to void this transaction (if the batch hasn’t closed) issue a credit based on this transaction, or perform a new sale for any amount.
- Receipt: print or email a receipt for this transaction.
- Recur: set up a new recurring payment based on this cardholder’s information.
- Cancel: return to previous screen.
RECURRING

THIS SCREEN ALLOWS YOU TO MANAGE YOUR RECURRING PAYMENTS. YOU CAN ACTIVATE, DEACTIVATE, VOID, AND PERFORM OTHER TASKS FROM HERE. SELECT A RECORD IN THE MAIN SCREEN AND CHOOSE “EDIT/VIEW HISTORY” FOR INFORMATION AND CONTROLS ON THAT RECORD.

RECURRING BILLING FIELDS

- Status: show just active recurring records, just inactive records, or both.
- Data Type: filter by successful or failed records.
- From and To: set a date range to search through.
- First Name: search for recurring records with that information in the First Name field.
- Last Name: search for recurring records with that information in the Last Name field.
- Invoice: search for recurring records with that invoice number.
- Balance >: search for recurring customers with an outstanding balance greater than the amount entered.
- Recur ID: search for a specific recurring customer by their record number.
- ReBill Day: search for recurring transactions scheduled to bill on a specified day.
- Ticket #: search for a recurring record based on a specific original transaction.
- Last 4 Digits: search for any recurring records whose card number end with a specific last 4 digits (last 3 for AMEX).

**EDIT/VIEW HISTORY**

- Active Check Box: indicates the record is active.
- Email: email address a receipt will be sent to upon a recurring transaction being approved (if set to do so in recurring settings on slimcd.com).
- Expire Date: expiration date of the card.
- Rebill Cycle: how often the system will recharge the card.
- Payments Left: place a number and the system will count down with each payment and automatically deactivate when it reaches 0. Leave at 0 and the system will not deactivate.
- Day of Week/Month/Quarter: determines when the system will bill the customer.
- Rebill Invoice #: information placed here will be used as the invoice number with each recurring payment.
- Start Date: when the system will start billing the customer (MM/YY).
- Rebill Amount: the amount to bill the customer each iteration.
REPORTS

CLICK THE REPORTS BUTTON TO BE TAKEN TO SLIMCD.COM AND LOGGED INTO YOUR ACCOUNT
OPTIONS MENU

GENERAL SETTINGS

- Device ID: the unique ID you send with each transaction, used in the Device report on slimcd.com. This is generated automatically upon installation, and can be changed if desired.
- Transaction URL: determines which server to send transactions through.
- Statistics URL: determines which server to pull reports from.
- File Processing AutoSubmit: if Slim CD for PC is being launched by another program, this will automatically submit the transaction to a PIN pad when launched.
- File Processing Delete XMLLogon.XML: if Slim CD for PC is being launched by another program this will delete the logon file once it’s been loaded.
- Diagnostic Logging: increase the amount of logging data captured and saved to the log file.
- Draw Strike Through on VOIDS: will make voided transactions easier to spot on the Search screen.
**TRANSACTION ENTRY OPTIONS**

- **Processing Status Mode**: determines how the status of an EMV transaction is presented to the user (PIN Pad only).
- **Swipe Signature Threshold**: will not prompt for signature on a swiped transaction when total is below the amount entered here.
- **Default for Allow Duplicates**: sets a default setting for the “allow duplicates” flag on Transactions.
- **Default for Card Present**: sets a default for the “card present” flag on Transactions.
- **Allow Partial Approvals**: if set to yes, we will pass through a partial approval. If set to no we will void a partial approval and display a decline to the user.
- **Require Street in Keyed Transactions**: require user to enter street address when transaction is keyed.
- **Require Zip code in Keyed Transactions**: require user to enter a zip code when transaction is keyed.
- **Display Popup on Declined Transactions**: pop up decline message that must be dismissed when a transaction is declined.
MAGSWIPE MICR READER

- Magnetic Swiper: set the type of magstripe card reader you have plugged in.
  - Regular swiper is for unencrypted units
  - IDTech MiniMag is for encrypted magstripe only reader.
  - IDTech Augusta is for encrypted EMV/magstripe combo reader.
  - 3DES is the most common encryption type.
- Check Reader Type: set the type of check reader you are using (image readers not supported at this time).
**PINPAD SETTINGS**

- PinPad Connection: select how the PIN pad is connected to the PC.
- PinPad Type: select the type of PIN pad being used.
- Connection Settings: specify the COM port or IP address of the device.
- Connection Lifespan: sets connection to the PIN pad; when Slim CD for PC is connected to a PIN pad, no other device can connect.
  - Execution: connect when user logs in, stays connected until user logs out.
  - Transactional: connect with each transaction, disconnect after transaction complete.
  - Shared PIN Pad: connect with each transaction, disconnect before receipt prints.
- EMV Enabled: sets whether the PIN pad accepts a chip insert or not.
- EMV on Refund: turn off to allow a user to swipe for a credit. Recommended because processing a credit via EMV can lead to a declined refund.
- Swipe Enabled: turns magstripe reader on or off.
- Credit Cards: flag to accept credit cards.
- PIN Debit Cards: flag to accept PIN debit cards.
- Gift Cards: flag to accept gift cards.
- Surcharge: automatically calculate surcharge (must be configured by ad administrator on slimcd.com).
- Receipt: print receipt from device (not currently supported).
- Contactless: determines if contactless goes through as swipe or EMV transaction.
- Cashback: turns prompt for cash back on or off.
- Tip Prompt: turns prompt for tip on or off.
- Confirm Totals: determines if pad will display a confirmation of the total amount.
- Get Signature: determines if the pad will capture a signature (if supported).
- Address: has pad prompt for address when keying a transaction into the PIN pad.
- CVV2 Prompt: has pad prompt for CVV2 when keying a transaction into the PIN pad.
- Require: determines if the pad must support encrypted communication before processing a transaction (avoids processing data in an unencrypted manor).
**RECEIPT PRINTER**

- Receipt Printer: select which printer to send receipts to.
- Font Face: select a specific font to print receipts in.
- Font Size: adjust the size of the font that appears on receipts.
- # Copies: select the number of copies of a receipt that will print each time.
- Between Delay: delay between multiple receipts (useful when using a receipt printer with a tear bar).
- Auto Print: Yes will automatically print receipt(s) after any approved transaction.
- Return Delay: determine how long Slim CD for PC retains control when called by another program.
CHECK FOR UPDATES

SLIM CD FOR PC WILL INFORM YOU WHEN NEW UPDATES ARE AVAILABLE. THE SCREENSHOT BELOW SHOWS WHERE THE SYSTEM WILL INDICATE WHEN AN UPDATE IS RELEASED. YOU WILL SEE A LIST OF ALL AVAILABLE UPDATES, AND CAN CHOOSE ONE TO INSTALL. PRESS PERFORM UPDATE TO INITIALIZE THE UPDATE PROCESS.
CONFIRM YOUR DESIRE TO UPDATE, AND SLIM CD FOR PC WILL UPDATE AND RE-LAUNCH.

YOU CAN ALSO DOWNGRADE TO OLDER VERSIONS OF THE SOFTWARE, BUT THAT IS NOT RECOMMENDED UNLESS YOU ARE TOLD TO DO SO BY A SLIM CD REPRESENTATIVE.
**VIEW LOG FOLDER**

This will bring you to the folder where the Slim CD for PC logs are stored. There will normally be one log per day. No sensitive login or credit card information is stored in these logs.
ABOUT SLIM CD FOR PC

CURRENT VERSION INFORMATION AS WELL AS CONTACT INFORMATION FOR SLIM CD.
LOGOUT

LOG OUT OF SLIM CD FOR PC AND RETURN TO THE LOGIN SCREEN.