Podium Payments

Overview

Exclusive for Edge versions **23.2.8 or higher,** The **Podium Payments** integration allows you to process payments with **Podium** directly within Edge POS. This integration includes an all-in-one **Process Credit Transactions** screen with the ability to **swipe credit cards** for quick processing, **split payments** between **multiple cards** or **multiple tender options**, process cards **manually**, and more.



You must be a **Podium** customer to use this feature. Existing **Podium** customers must also sign up for this feature directly with Podium. Please see the section below on **Getting Started** for more information on signing up for Podium and signing up for the **Podium Payments** feature.

Getting Started

Podium Payments is a licensed-based Edge integration requiring an initial sign-up through **Podium**. They will alert our **Administrative** team about your subscription who will then issue you a new **Edge license** via email. The newly issued license must be installed prior to using this feature in Edge. Installation steps are **included** with your license.

To have Podium activate this feature fill out the form: Integrate Payments with The Edge + Podium

Setup

After you have successfully installed your new license, you must **Configure** and set the **System Option** for **Podium** which will activate the POS buttons.

Configuration

This is an important first step for using this feature and must be done on **each workstation** with a credit card reader attached.

To set the Podium DLL:

- 1. Navigate to Administrative > Configuration.
- 2. Scroll down to the **Plug-Ins** section and click on **Credit Card Processor Plug-Ins**, then click the button with the **3 dots** to the right.

	Edge Configuration	- 🗆 X
•	₽↓	
	StonesFolderPath	F:\DATA\Shopify_SQL\Photos\Photos\photos\Stones\
	Timed Automation Run Mode Only	False
_	Timed Automation Station	Тпре
~	Plug-Ins	
	Credit Card Processor Plug-Ins	
\sim	Postcards	N
	Name or IP Address of the Postcard Server	5
~	RFID	
	RFID Config File	
	RFID Maintains Connection	True
	RFID Server Type	None

3. The **Open File** window will open. Navigate to the folder **C:\program files (x86)\ajsllc\Edge** and select the file **Edge_CC_Podium.dll**, then click **Open**.

$()$ New \checkmark $()$ $($	
$\leftarrow \rightarrow \checkmark \uparrow$ This PC \rightarrow OS (C:) \rightarrow Program Files (x86) \rightarrow ajsllc \rightarrow Edge \lor C Search Edge	Q
OneDrive - Persc Name Date modified Type Size Stage_CC_IMS_1.dll 8/15/2023 2:22 PM Application extension 20 KB	
Besktop	
Documents	
✓ Downloads	
Image: Section of the section of	
Videos Videos CC TRAINING PAX.dll 8/15/2023 2:22 PM Application extension 20 KB C Edge CC TRAINING PAX.dll 8/15/2023 2:22 PM Application extension 65 KB	

4. Click OK to save your configuration change.

Connecting with Podium Device ID

Once you have set the **Podium DLL** and **restarted Edge**, the next step is entering your **Podium credentials** to complete the integration and begin using **Podium Payments at POS**.

To enter your **Podium** credentials:

- 1. Navigate to Administrative > Credit Cards > Podium Credit Card Processing. The Podium Credit Card Processing window will appear.
- 2. Enter your **device's ID** into the **Device ID** box.

Setup Podium Merci	hant Services
Workstation Settings	
Device ID	Test Device
Timeout	30 seconds
Default Notification	Store Email
Notification Email	storeemail@storenamel.com
	OK Cancel

Select a notification type (phone, email, or store's email) from the Default Notification drop-down. This box helps control where receipts are sent after a sale is processed in relation to the Send Payment Confirmation checkbox on the Process Credit Transactions window. Please see the Send Payment Confirmation section below for information on how your selection controls notifications in relation to the checkbox.

Process Credit Transactions Window

The **Process Credit Transactions** window can be accessed at **any** point during a sale once a sale line has been added by clicking the **Credit Card** button, even if the window has been closed by either clicking the **Finish** or **Close** buttons.

			Purchase 1 transaction 206.70 Awaiting Processing	
				0
Cash	Gift Cert	Credit Memo		
Check	lender/ Reward Card	House Account	Send Payment Confirmation	
Credit Card	Layaway	Del Line	Click Here for Merchant Services Information	Podium Credit Card Processing

Custom Amount:

Customize the amount being charged to one credit card to **split payment** between **multiple** different tender options beyond just credit cards. **For example**, if a customer has both cash and credit card as payment and would like to pay \$500.00 with the credit card and the remainder in cash, you can put \$500 as the amount using the **Custom Amount** button:

	Enter an amount	to split from this	transaction.		
	Enter the amou	nt to charge to	credit card		
	Amount		\$500		
			ОК	Cancel	

• Manual:

The Manual option is NOT available for Podium Payments.

• Offline:

See the <u>Podium Payments: Processing Offline Transactions</u> article for steps on processing offline transactions with Podium.

• Split CC:

If a customer requests splitting payment between multiple credit cards.

Purchase (0 pri	nsaction ocessed)	500.00	Awaiting Process	ling	
	Enter a Enter a Amour	n emount to split fra an amount to split nt:	on this transaction. I from this transaction \$15	0.00	
			ОК	Cancel	
				1	

• Process:

Process the credit card(s). Processing a credit card using **Process** requires a card to be **swiped**. You will see a **green dot** if the charge was completed **successfully**, or you will see a **red dot** with **error message** indicating that the process **could not** be completed.

urchase (2	transaction 2658.75 processed)	2658.75	Approved:		(
			1			
otal: \$2,658	3.75 Custom Ar	nount Manua	al Split CC	Process	Finish	Close
k H <mark>ere</mark> for Mer	chant Services Information		-		Podium	Payments
Purchase	1 transaction (0 processed)	150.00	Error: (401) Uni See https://toc	authorized Is.ietf.org/html/rfc7	235#section-3.1	for further detai
a	1 transaction (0 processed)	350.00	Error: (401) Uni See https://toc	authorized ls.ietf.org/html/rfc7	235#section-3.1	for further detai
Purchase						
Purchase						
Purchase						
Purchase						
Purchase					7	

• Finish:

Closes the **Process Credit Card Transactions** window. This allows you to enter other tender options if a customer choice the **Customize** option, or allows you to **complete the sale** as normal by clicking **Done** if credit cards processed successfully.

NOTE: The **Finish** button is **only** enabled if credit cards have been **processed** by using either the **Process** or **Manual** buttons. If a transaction line says **Awaiting Processing**, you can **only close** out of the screen using the **Close** button.

• Close:

Closes the **Process Credit Card Transactions** window when transaction lines are still listed as **Awaiting Processing**. This allows you to choose an alternative tender option first, then putting the remaining balance on a credit card.

Processing Offline Transactions

The **Offline** button can be accessed from the **Process Credit Transactions** screen. Visit the **Process Credit Transactions** section above to learn more about how to process credit card transactions using the **Process Credit Transactions** screen. Processing a sale offline with Podium Payments:

- 1. Find the customer and select the associate, as normal, then find/scan the item to be sold.
- 2. Click the Credit Card button. The Process Credit Transactions screen will appear.
- 3. Highlight the **Purchase** row and click the **Offline** button at the bottom.

Process Credit Tra	ansactions							
Purchase	1 transaction (0 processed)	31.55		Awaiting Proce	ssing			
L								
8 H E								
Total: \$31.5	5 C	ustom Amount	Manual	Offline	Split CC	Process	Finish	Close
Click Here for Mer	rchant Services Informa	ition					Podium	Payments

4. Enter the credit card information into the fields on Offline Credit Card Entry screen then click OK.

ct St	Offli	ne Credit Card Ent	ry	
_	0	Cardholder Name		
	Ca (La	rd Number st 4)		
		Card Type		•
	armit O	Expiration (MM-YY)	01-01	
		Auth Code		
l		The OFFLINE b	tton will NEVER send anything to merchan	t services.
			ОК	Cancel

5. The **Process Credit Transactions** screen will now show the **Purchase** line with a note indicating **offline processing** was selected, as shown below:

Process Credit	Transactions			
Purchase	1 transaction (31.55 processed)	31.55	Approved:	
	Offline Card Processing Selected	+		
Total: \$31	.55 Custom	Amount Manual	Offline Split CC Pro	cess Finish Close
lick Here for M	Verchant Services Information			Podium Payments

6. Click the **Finish** button to close the **Process Credit Transactions** screen, then **Done** to complete the sale as normal.

Send Payment Confirmation to Customer

A **Send Payment Confirmation to Customer** checkbox has been added to the **Process Credit Transactions** window that acts as a record of payment made by the customer through Podium.

Purchase	1 transaction (0 processed)	5.32		Awaiting Processing				
Send Paym	ent Confirmation	to Customer						
		Custom Amount	Manual	Offline	Split CC	Process	Finish	Close
otal: \$5.32		Contraint Party of the						

This box is checked by default. You must manually uncheck the box as desired for each transaction. NOTE

This box being **checked** or **unchecked** will do one of the following:

- Checked Sends receipt to the customer. The customer will receive either an email or text based on the Default Notification option selected in the Podium Credit Card Processing window.
- Unchecked Sends a copy of the receipt to the store's email. This overrides any Default
 Notification selection made on the Podium Credit Card Processing window and does NOT send a copy
 to the customer. A copy is ONLY sent to the store's email address.

Please note that if you **do NOT** see the **Send Payment Confirmation to Customer** checkbox, that this checkbox is **hidden** if you selected the **Store Email** notification type when setting up your **Default Notifications** on the **Setup Podium Merchant Services** screen.

Process Credit Tr	ansactions					
Purchase	1 transaction (0 processed)	5.32	Awaiting Processing			
		Default Notification Store Email	Store Email ~			
				ок	Cancel	0. N. 0
		/				
		\geq				
Total: \$5.32	. c	Sustom Amount	Manual Offline Split C	Process	Finish	Close
Click Here for Me	rchant Services Inform	ation			Podium Credit (Card Processing

To verify your Default Notification type, or to change your selection, navigate again to Administrative > Credit Cards > Podium Credit Card Processing. Please see the section below on Setting Up Default Notifications for more details on how your selection determines where receipts are sent.

Setting Up Default Notification

Default Notification has three options:

- **Phone** sends to the customer's **preferred phone number**.
- Email sends to the customer's preferred email address.
- Store Email sends to the store's email address and hides the Send Payment Confirmation to Customer checkbox. Selecting this option eliminates the ability to send payment confirmations to customers via email or phone.

Setup Podium Merch	nant Services
Workstation Settings	
Device ID	Test Device
Timeout	30 seconds
Default Notification	Store Email V
Notification Email	storeemail@storenamelcom
	OK Cancel

NOTE

If the customer has a preferred phone number but **NO** preferred email address but email is selected, the customer will receive the notification to their **preferred phone number**. The same is true if a customer has no preferred phone number selected.

Special Considerations for Processing Returns with Podium Payments

If a customer come back into your store to make an **exchange** on an item, meaning an **item return** with a **new purchase** in **one transaction**, you now have the ability to charge only the **cost difference** between the two items as opposed to doing a full return followed by a new sale. This method gives customers the opportunity to purchase the new item right away **without** having to wait for **pending funds** to be returned to their card.

Michael Weimar 3 Corporate Dr Suite 215 Shelton, CT 05484				Find Cust New Cust	Notes / Edit Wish List	Contacts Appts	s Oppo (2) Quotes								(9) Pick U Finish
14	20844 33	29105	882 07/2023	No Name	Ship										Canc Orde
ine	Item #	QTY								Description					
1	Mixed Goods		(RETURNING) M	ixed Good	: .5 Carat l	Diamon ,	vocess Credit 1	unaction							
							Purchase	1 transaction (0 processed)	1063.50		Awaiting Proc	ming			
2	Mixed Goods		1.00 Carat Diamo	nd											
															O THIN
							Send Paym	vent Confirmation							
							Total: \$1,06	33.50	ustom Amount	Manual	Offline	Split CC	Process	Finish	Close



If the newest purchase from the exchange is then returned, you **MUST** do **two separate returns** in order for the returns to be reflected in Edge correctly. The **original purchase** does need to be returned, as does the **difference** that was charged for the **second purchase**.

Michael Weimar 3 Corporate Dr Suite 215 Shelton, CT 06484					Find Cust New Cust	Notes / Edit Wish List	Contacts Appts	Oppo (2) Quotes								
14	20844 34	30169	887	07/2023	No Name	Ship										
ne	Iteen #	QTY									Description					
	Mixed Goods		(RETUR	NING) MI	xed Good	s: 1.00 Car	at Diam(_p	vocess Credit Tr	mations							
								Return	1 transaction (0 processed)	-2127.00		Awaiting Pro	essing			
								Return	1 transaction (0 processed)	-1063 50		Awaiting Pro	essing			
								7.4 .4								
								Total: (\$3,1	30.50)	Custom Amount	Manual	Offline	Split CC	Process	Finish	Clo