Global Cash Card Integration

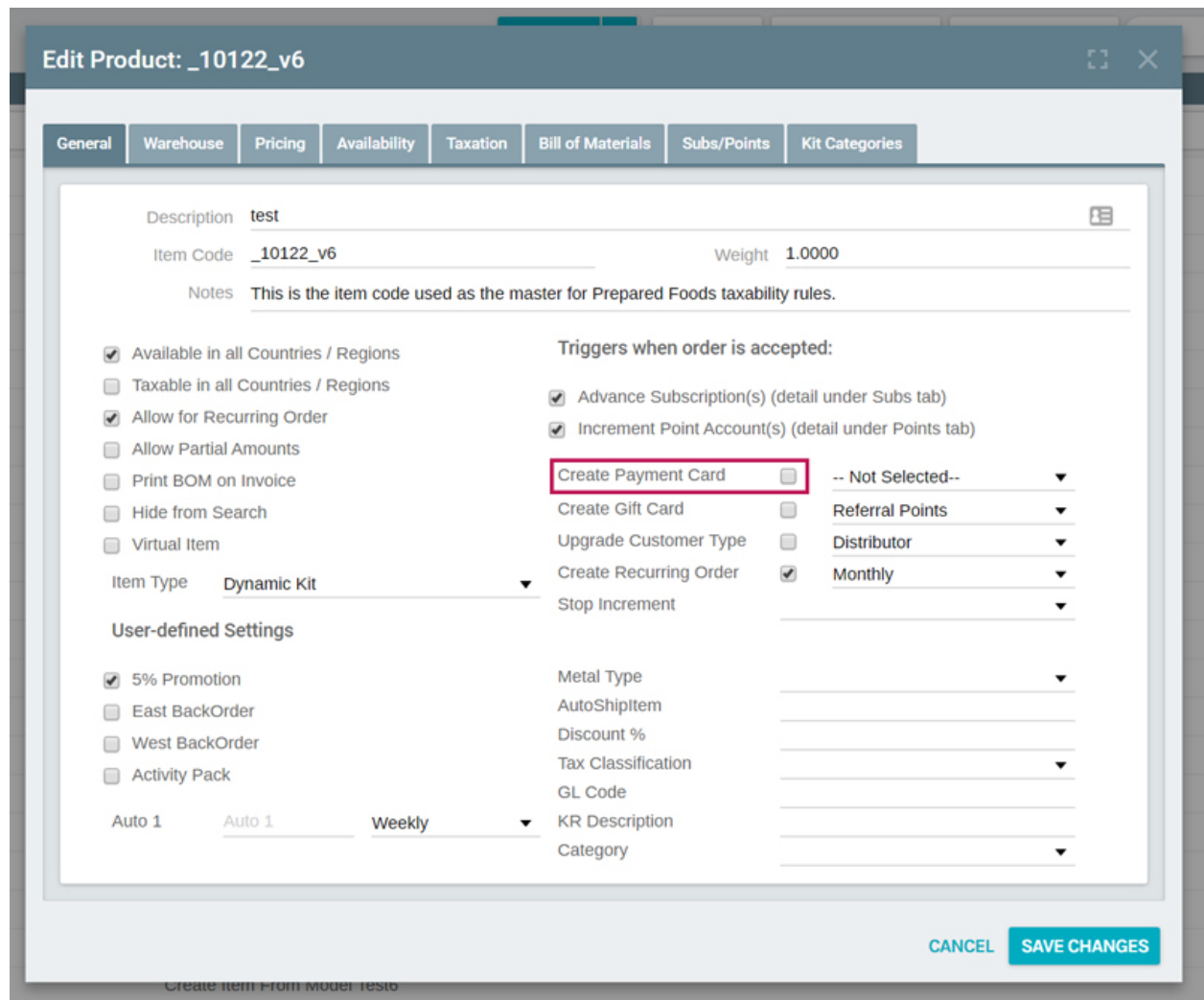v1.0

Global Cash Card Integration

HOW TO ISSUE A CARD TO A REPRESENTATIVE

This is an automated process that is triggered when an order is placed for an item that has been configured for the payment card.
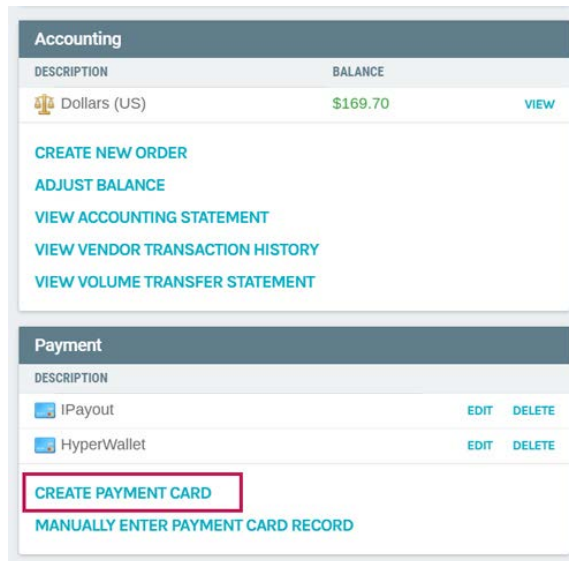
If you go to **Accounting>>Items** and then **edit a signup kit**, you will see a setting at the bottom of the **General tab** called **Create Payment Card**.

If this setting is checked, then any time this item is ordered and paid for (Order status=Accepted), then the card request will automatically be issued to Global Cash Card via a "secure data push."
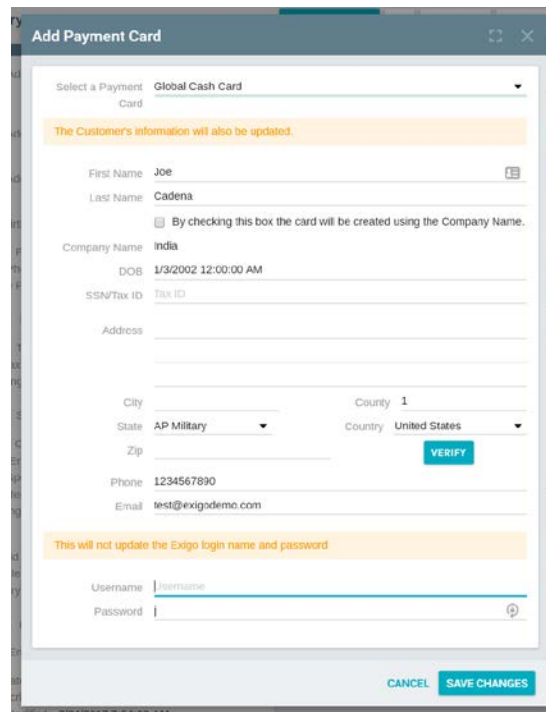

Each card request is logged into a table to monitor these requests and the response we receive back from GCC. This table is called **Payment Card Requests** and can be found in the **Report Builder**.

If you have a need to manually push a card request to GCC, then you can go to the **Customer screen of the Representative**. On the **customer portal** in the **Payment section** at the bottom of the middle column, you will see a link called **"Create a Payment Card"**.

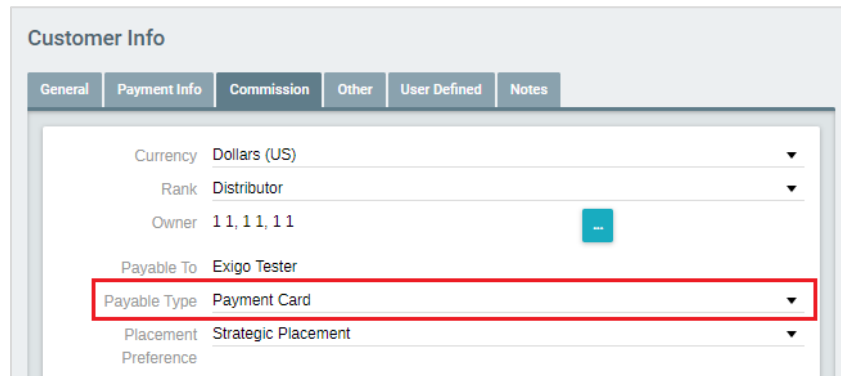If you click on this, then the **Create Payment Card** screen will appear.

You can verify the data or make any changes.

NOTE: Please make sure that the Username and Password fields are not blank. Also, these values cannot be the same as the Representative's first or last name.

Once you have verified the data, click on the **OK button** to submit to GCC.

It will then send the request to GCC and log the information into the Payment Card Requests table.

Once a successful response is received back from GCC, the "Create a Payment Card" link will no longer appear on the Customer Portal. The Payable To field on the Comission tab of the Edit Customer screen will be changed from the default value of "Check" to "Payment Card".

HOW TO LOAD COMMISSION FUNDS TO A REPRESENTATIVE'S CARD

This process is also automated. When you use the **Pay Vendor feature**, the unpaid commission vendor bills can be loaded to a **"secure data push"** that is submitted to GCC.

To pay commissions, you go to **Accounting>>Accounting Overview**. In the **Bills To Pay section**, you would click on the **"Pay" link** found to the right of the set of bills you need to pay.
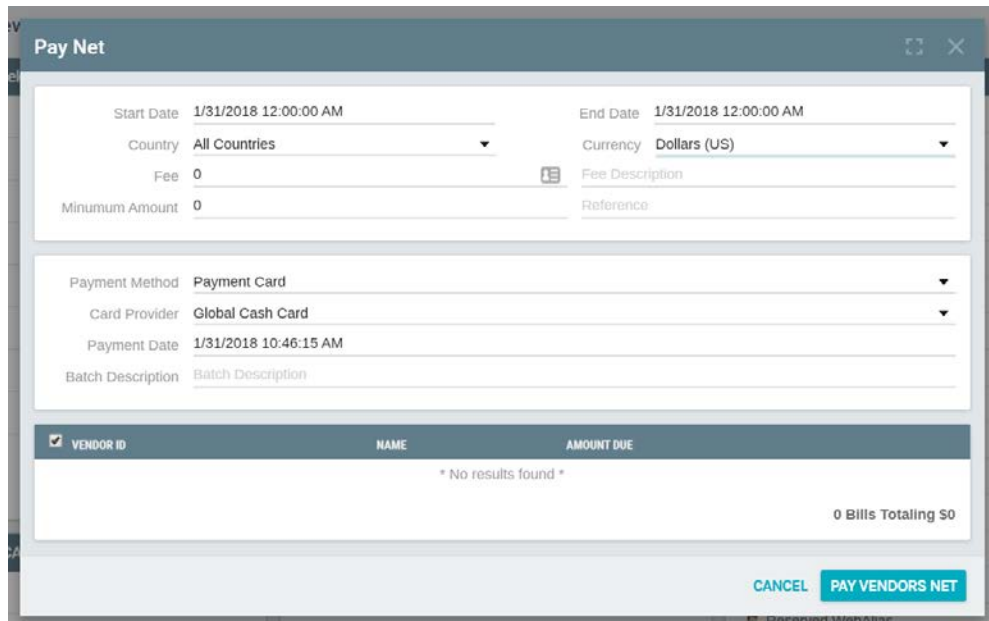
Bills To Pay - Dollars (US)	
Within 10 days:	$0.00
Within 15 days:	$0.00
Within 30 days:	$0.00
Within 15 days overdue:	$150.00
15 days overdue:	$0.00
30 days overdue:	$0.00
60 days overdue:	$0.00
90 days overdue:	$561,790.90
PAY NET	
PAY WITH POINTS	

The **Pay Vendor screen** will appear.

Modify the settings at the top of this screen as follows:

- **Payment Method** – change to Payment Card.
- **Card Provider** – change to Global Cash Card
- **Payment Date** – will default to today's date, but you can click on the box to the right of the date to use the calendar popup to change it.
- **Bank** – will default to your Default Bank Account, but you can click on the box to the right of the account name to change this to a different account.
- **Select All** – this box will be checked so that all bills listed will be paid. You can remove this and then scroll through the records and uncheck any vendors you do not wish to pay at this time.

At the end of each record, there is a box for the Pay column that will default to the amount of the vendor bill. You can modify this value if you wish to load a different amount.

Once your settings are correct, you can click on the **Submit button**, the following screen will appear to show the load progress.

If there are any errors during the load, you can click on the View Errors button to review them:

 Once this process is completed, all vendor bills that were unpaid (status=Bill Received) will be modified to show as paid (status=Paid in Full or Partial Pay).

Payment records to represent the load amounts will also created.

For any bill that could not be loaded due to any errors, the vendor bill will keep the unpaid status.

All data that was sent to GCC for the load will also be recorded in the **Payment Card Transactions table**. This table is also available in the **Report Builder**.

WHAT IF THERE ARE LOAD FEES?

If you need to charge a per transaction load fee each time there are funds loaded to a card, **please contact Exigo** and we will setup this parameter along with your GCC account settings.

The Fee will be deducted each time the load file is prepared for submittal.

WHAT IF I NEED TO RELOAD A PAID BILL TO THE CARD?

Go to the **Vendor record** and **create a new manual bill** for the amount you wish to load and then process the **Pay Vendor steps** from above.

HOW CAN REPRESENTATIVES SEE THEIR TRANSACTIONS FROM THEIR CARDS?

You can **add a link to their back office** that will pull in their GCC account.

Here is the information you will need to put in the header code of the content page that your menu link is tied to:

```
<input type=hidden name='loginname'
value='<%=ExigoUtil.GetCustomerField("LoginName")%>'>

<input type=hidden name='password'
value='<%=ExigoUtil.GetCustomerField("Password")%>'>

<script language=javascript> document.forms[0].action =
'https://cardholder.globalcashcard.com/index.cfm?view=login&cobrand=visalus';

document.forms[0].submit();

</script>
```

Please be sure to notify Exigo if you need support on this setup.

You will also need to make sure that GCC has your **silent login for this link setup** for your account and has provided your **'cobrand' parameter** for the url link.