



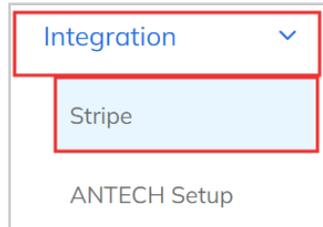
Stripe Payments

Setup Guide

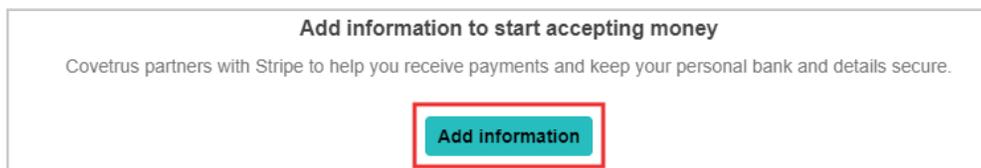
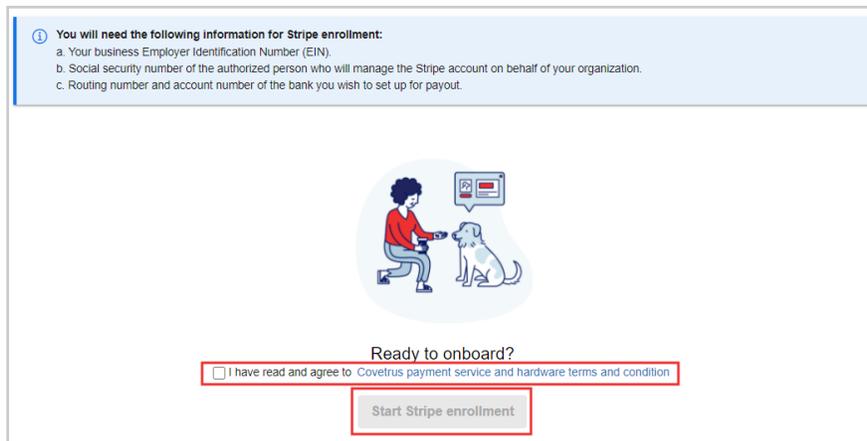


Stripe Enrollment & Activation

- To enroll with Stripe and order devices, go to **Settings > Integrations > Stripe**.



- To complete enrollment, you will need:
 - Your business **Employer Identification Number (EIN)**
 - Social security number** of the authorized person who will manage the Stripe account on behalf of your organization.
 - Routing number** and **account number** of the bank you wish to set up for payout.
- On the right side of the screen review and agree to the terms and conditions by checking the box.
- Then, click the **Start Stripe Enrollment** box.



- This will open a dialog box that will lead you through the account creation process.

STRIPE PAYMENTS SETUP GUIDE

Test mode

Let's start with some basics

Choose your business type to get started.

Type of business

Individual

If you have not filed paperwork to register as a business entity, then your business type is likely to be Individual. Not sure which option to select? Refer to this [support article](#).

Continue

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- After the application is submitted, the **Account Management** link will appear where merchants can view and edit information about their business.

Great News! Your application was submitted.
You can order and set up your devices.

[Go to Account Management](#)

Device Ordering

You can order as many devices as you need.

[Go to Device Ordering](#)

Device Set Up

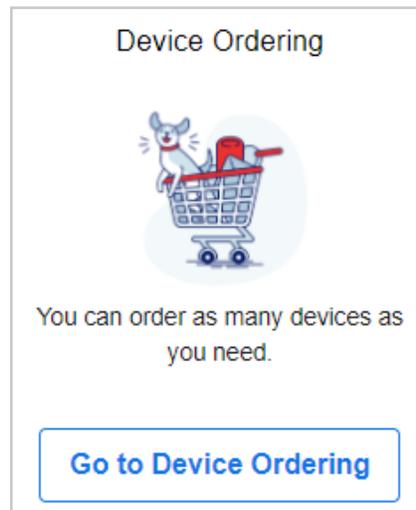
Register and set up devices to start accepting payments.

[Go to Device Set Up](#)

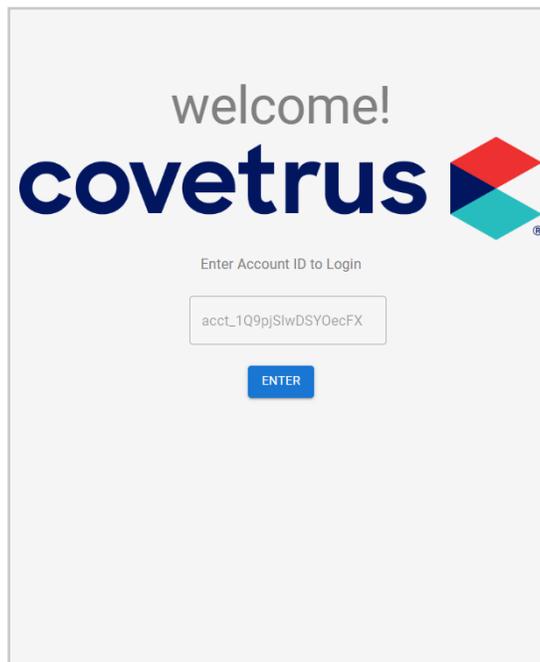
Ordering Devices

Once your account is set up, it's time to order your card readers.

- On the Stripe page, click on **Go to Device Ordering** from the Payment Processing page.



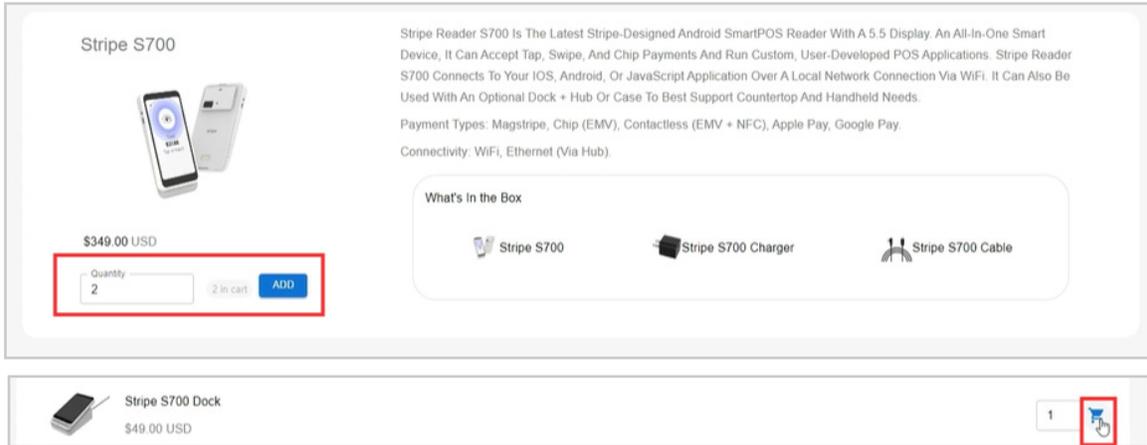
- This will open a new window and prefill your Account ID. Hit Enter.
- Next, complete the SMS verification by entering a valid phone number.



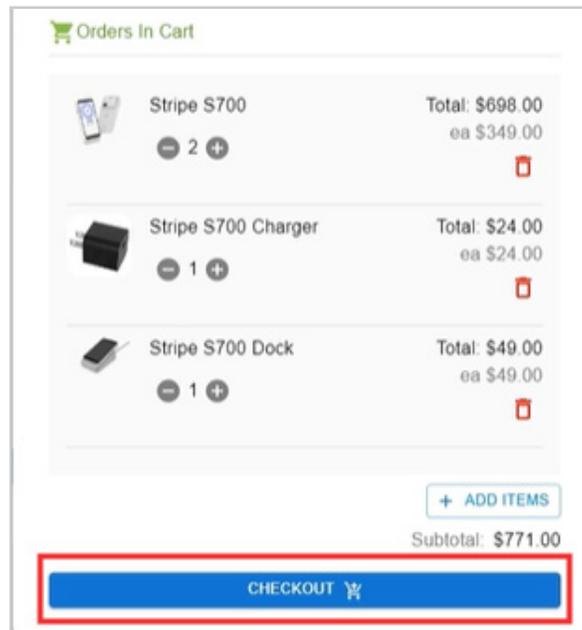
- Once the verification is complete, the hardware catalog will open.

STRIPE PAYMENTS SETUP GUIDE

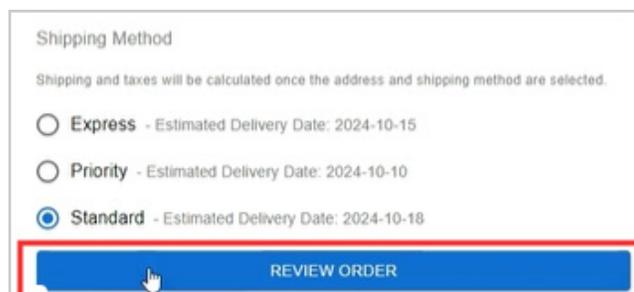
- Users can then add desired hardware to their cart by using the **quantity field** and **add button** or the **shopping cart button**.



- When complete, view the cart and click **Checkout**.



- Enter the shipping address and shipping method, then click **Review Order**.



STRIPE PAYMENTS SETUP GUIDE

- At this point you'll review the order and click the **Confirm and Pay** button.

Review Order

Stripe S700	x2	\$349.00	\$698.00
Stripe S700 Charger	x1	\$24.00	\$24.00
Stripe S700 Dock	x1	\$49.00	\$49.00

Review Address

Company Name: **Farm Vet**

Recipient's Name: **Farm Vet**

Phone: **(800) 555-0175**

Email: **farmvet@covetrus.com**

Address: **1000 Redwood Ct., #1000, Silver Spring, MD**

Shipping Method: **standard**

Coupon: **THANKYOU** **APPLY**

Subtotal: **\$771.00**
Shipping: **\$22.00**
Taxes: **\$46.26**
Total: **\$839.26**

By confirming and paying you are agreeing to the [Terms of Service](#)

CONFIRM AND PAY

- Enter the payment information and click **Pay Now**.

Address: **1000 Redwood Ct., #1000, Silver Spring, MD**

Shipping Method: **standard**

Subtotal: **\$771.00**
Shipping: **\$22.00**
Taxes: **\$46.26**
Coupon (\$698.00 off): **-\$698.00**
Total: **\$141.26**

Secure, 1-click checkout with Link **▼**

Card number **VISA**

Expiration date **MM/YY** Security code **###** **MasterCard**

Country **United States** Zip code **20910**

Save your info for secure 1-click checkout with Link **Optional**

Email

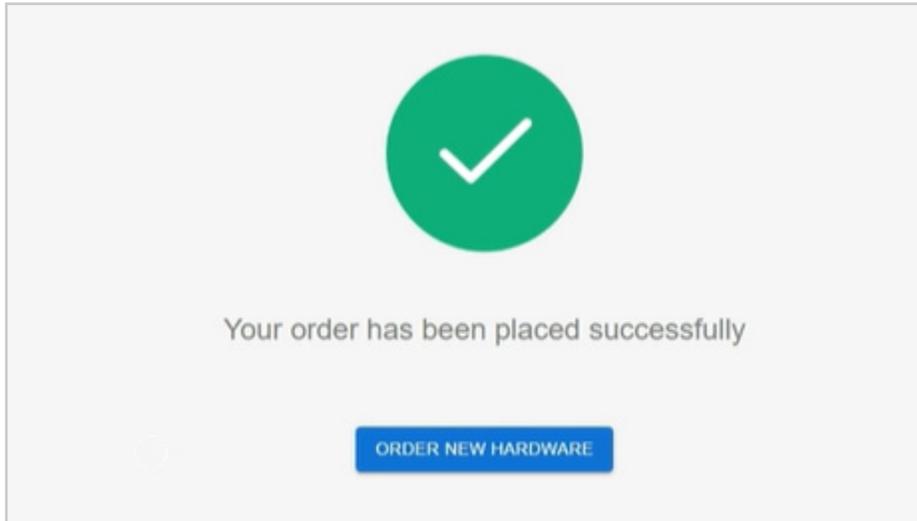
(800) 555-0175

link • By providing your info, you agree to create an account subject to Link's [Terms](#) and [Privacy Policy](#). [Learn more](#)

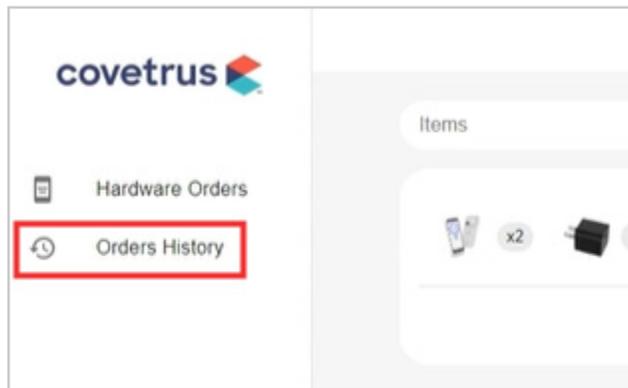
CANCEL **PAY NOW**

STRIPE PAYMENTS SETUP GUIDE

- When the order is placed a confirmation message will display verifying the order was placed.



- To view the details of the order use the **Orders History** menu option.



- At this point the order can be canceled if needed by utilizing the the Cancel Order option. This option will not be available once the order is shipped.

Items	Status	Amount	Order Placed	Address
 x2  x1  x1	Placed	\$141.26	October 8, 2024 3:43 PM	           
				

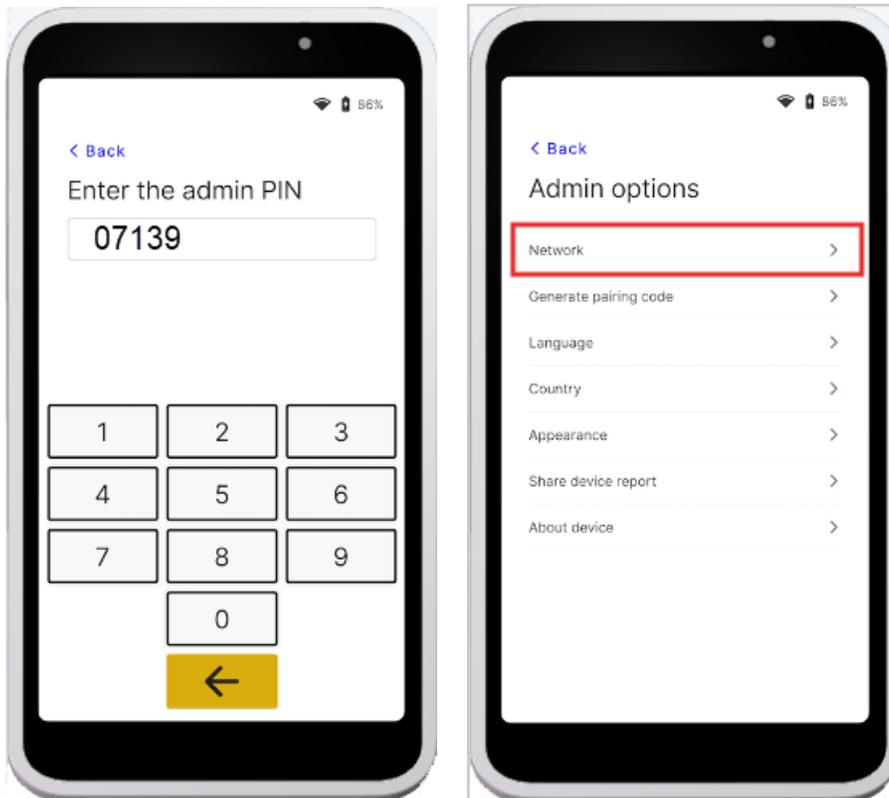
Reader Set Up

Before the registration of the card readers can be performed please make sure they are fully charged.

Configuring the Network

To configure the Wi-Fi, swipe the reader screen left to right and select **Settings**.

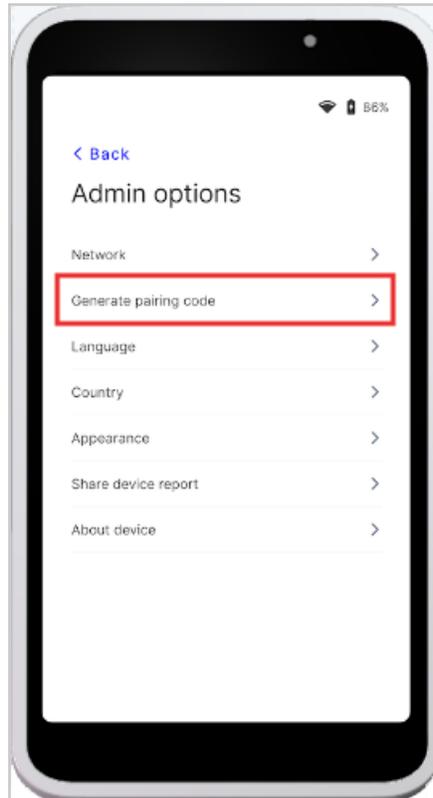
- Enter **07139** for the admin PIN, then go to **Network** and choose the correct Wi-Fi network.



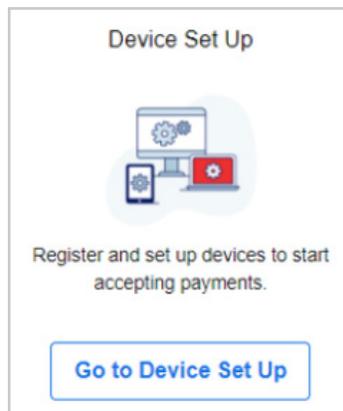
Registering the Reader

- Once the reader has been registered on the Wi-Fi network, if the pairing code doesn't appear on the reader, return to the Admin options and select **Generate pairing code**.
- A registration code will appear on the reader, and will need to be entered within Pulse.

STRIPE PAYMENTS SETUP GUIDE



- This is done by going to **Settings > Integrations > Stripe > Device Setup**.



- Scroll down to the **Stripe Payment Readers** section.



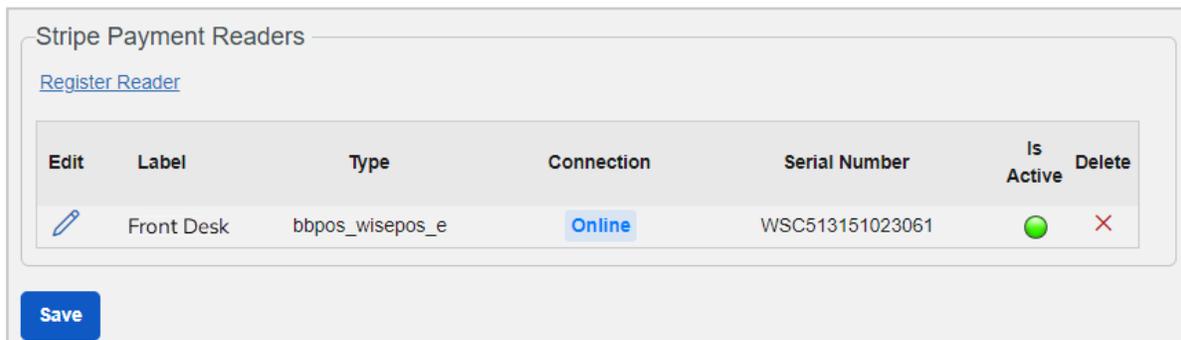
STRIPE PAYMENTS SETUP GUIDE

- This will display a Register Reader dialog box where you'll enter the Reader Label and the Registration Code.



The dialog box is titled "Register Reader" and has a close button (X) in the top right corner. It contains two input fields: "Reader Label *:" and "Registration Code *:". Below the input fields are two buttons: "Save" and "Cancel".

- **Reader Label:** Name to identify the reader used when processing a payment. This name will appear for selection at check out. Example: "Front Desk", "Exam Room", or any nickname you wish.
- **Registration Code:** Enter the code shown on your device.
- Select **Save** and the reader will restart and perform firmware updates. *(This step may take 5 to 10 minutes.)*



The table is titled "Stripe Payment Readers" and has a "Register Reader" link above it. The table has the following columns: Edit, Label, Type, Connection, Serial Number, Is Active, and Delete. There is one row of data with the following values: Edit (pencil icon), Label (Front Desk), Type (bbpos_wisepos_e), Connection (Online), Serial Number (WSC513151023061), Is Active (green dot), and Delete (red X). Below the table is a "Save" button.

Edit	Label	Type	Connection	Serial Number	Is Active	Delete
	Front Desk	bbpos_wisepos_e	Online	WSC513151023061		

- Return to Pulse and register the remaining readers, if needed.

Testing Transactions

Once the readers are registered it's recommended to run a test transaction with each reader to ensure the settings are configured properly.

- Find a test client and click on **Make Payment**.
- Process at least a **\$.50** payment using **credit card** payment type.

STRIPE PAYMENTS SETUP GUIDE

The screenshot shows the Stripe Payments interface. It features a form with the following fields: 'Amount' (0.50), 'Payment Type' (Mastercard), 'Terminal:' (Front Desk), and 'Skip credit card processing?' (Yes/No). There is also a 'Key Card in Manually?' checkbox. A '+ Add Another Payment' link and a 'Process Payment' button are located below the form.



Review the payment receipt and ensure the last 4 digits of the card number and transaction ID are included.

- Repeat test transactions for the remaining readers, if needed.
- Once the readers have been verified with test transactions, the payments will need to be voided.
- Navigate to the test **Client's Payment History**, and locate the test payments.
- For each test payment, select **Void** to void the test payments.

The screenshot shows a payment receipt with the following details: Receipt Number 1647, Payment Entry Date 8/20/2024 7:35 AM, Amount Paid \$0.50, and Payment Integrated Payment \$0.50. A 'Void Payment' button is highlighted with a red box. There are also 'Edit Receipt' and 'i' icons, and a mail/print icon in the top right corner.

Setting Up Text-to-Pay SMS

With Covetrus Comms or Message Media

For practices using Covetrus Comms or Message Media for SMS integration, you will need to confirm 'Enable SMS Integration' is enabled and saved.

- Employees must have business owner or manager role to be able to select this option

STRIPE PAYMENTS SETUP GUIDE

Edit Covetrus Media Animal Hospital - [Expand All](#)

Calendar Settings

Medical Record Settings

Integration Settings

Enable Covetrus North America Integration? *	<input checked="" type="checkbox"/>
Use Dymo Label Printer *	<input checked="" type="checkbox"/>
Enable SMS Integration *	<input checked="" type="checkbox"/>

- To setup Covetrus Comms or Message Media, Go to **Settings > Client Engagement > SMS Setup**.

Without Covetrus Comms or Message Media

If your practice wants to send an invoice using SMS, and does not have an SMS solution, you will need to enable the Covetrus SMS Integration.

- Go to **Settings > Practice Setup > General > Integration Settings**.
- **Enable Covetrus SMS** will need to be checked. If you do not see this option, please contact support.
- **Enable SMS Integration** needs to be disabled (unselected)
- **Save** the settings

Integration Settings

Enable OAuth Login *	<input checked="" type="checkbox"/>
Display Covetrus Prescription Management Online Activity *	<input checked="" type="checkbox"/>
Enable Covetrus North America Integration? *	<input checked="" type="checkbox"/>
Use Dymo Label Printer *	<input checked="" type="checkbox"/>
Enable SMS Integration *	<input type="checkbox"/>
Enable Covetrus SMS Integration *	<input checked="" type="checkbox"/>
Enable Patient Recapture *	<input checked="" type="checkbox"/>