Intuit® Merchant Service for QuickBooks®

Quick Start Card - Step-by-Step Instructions

Make sure you have the most recent update. Go to quickbooks.ca/update to learn more.

STEP 1 Set up QuickBooks to handle payments

Note: Only QuickBooks Administrators can complete the following tasks.

1. Follow the instructions in your approval email to log in and activate your Intuit Merchant Service Account.

   Important: If you haven't received an approval email please contact customer support at **1-877-860-3321.**

2. Turn on additional security features in QuickBooks:

   - Go to the **Company** menu and click **Customer Credit Card Protection**. Click **Enable Protection**.

     (EasyStart Customers) QuickBooks guides you through the process to enable credit card protection when you attempt to complete step 3.

   You are required to use additional security features to satisfy the Payment Card Industry Data Security Standard (PCI DSS). If you haven't already done so, you might have to create separate QuickBooks login accounts and complex passwords. If you are having trouble with your QuickBooks password, please contact customer support at **1-877-860-3321.**

3. Turn on the function to allow you to process debit or credit cards in your company file – link your QuickBooks company file to your Intuit Merchant Service Account:

   - Go to the **Customers** menu, click **Add Credit Card Processing Activities**, then click **Link Merchant Account to Company File.** Follow the onscreen instructions.

     (EasyStart Customers) Go to the **Company menu**, click **Business Services**, then click **Add Credit Card Processing Activities**, and then click **Link Merchant Account to Company File**. Follow the onscreen instructions.

4. Enter your Terminal ID in QuickBooks:

   Locate your **Terminal ID**. You can find it on your approval email.

   - Go to the **Customers** menu, click **Credit Card Processing Activities**, and then click **Set Up Terminal ID.**

     (EasyStart Customers) Go to the **Company** menu, click **Business Services**, then click **Credit Card Processing Activities,** and then click **Set Up Terminal ID**. Follow the onscreen instructions.

   - Enter your Terminal ID. You only have to enter the Terminal ID once; QuickBooks stores this information in your company file.

STEP 2 Connect the K23 PIN pad to QuickBooks

1. Close QuickBooks.
2. Plug your K23 PIN pad into a USB port on your computer.
3. Insert the K23 PIN Pad Driver CD (that you received with the PIN pad) in your CD ROM drive. If the driver installation does not start automatically, go to **My Computer**, choose your disk drive and click **setup.exe**.
4. Restart QuickBooks.

If you chose not to use the K23 PIN pad card-reader, you can jump straight to Step 3 — Accept payments with QuickBooks.

STEP 3 Accept payments with QuickBooks!

1. In the QuickBooks form (for example, Receive Payments, Sales Receipt, etc.), select the **Payment Method** (for example, *Interac* Debit, VISA, or MasterCard).

2. If not already selected, select **Process credit or debit card payment** when saving.

3. (Optional) Click **Swipe Card** (if you have the K23 PIN pad card-reader).

4. Click **Save & New** or **Save & Close** on the form.

5. Follow the onscreen instructions and those in the PIN pad display to process the payment.

6. Click **Print** from the Processed Payment Receipt.
   QuickBooks prints two copies, one for you and one for your customer — remember to have your customer sign the credit card receipt. QuickBooks saves the receipt with the QuickBooks form (for example, Receive Payments, Sales Receipt, etc.), so you can reprint it if necessary.

NOTE: The first time you process a credit card, you may be asked to log in to your Merchant Service account.

Next Steps

Review the PCI DSS security requirements

While QuickBooks supports PCI standards, there are additional activities and rules you must follow to satisfy PCI DSS security requirements. The QuickBooks PCI DSS Implementation Guide describes these requirements.

You can download and print out the QuickBooks PCI DSS Implementation Guide here:
www.merchant.quickbooks.ca/pci-resources

Set up your Free Online Reporting

The ClientLine® Online Reporting tool helps you manage your credit card processing – view activity reports, online statements, and sales and deposit summaries; create and email customized reports; and easily manage charge-back reports.

1. Go to **www.myclientline.net** to get started.

2. Click **Enroll** and then click **Begin Enrollment.**
   Follow the onscreen instructions.

3. For detailed instructions go to **www.merchant.quickbooks.ca/clientline**
   or to get set up call **1-800-699-1024**

We're here to help!

Visit **www.merchant.quickbooks.ca/support** to access our self-service tools, Intuit Merchant Service for QuickBooks FAQs, and get answers to your questions.

System Requirements:

*Requires QuickBooks 2010 R5 (Pro, Premier, or EasyStart for The PC) or higher, or QuickBooks Enterprise Solutions. Application approval, an Internet connection on a Windows PC, Internet Explorer 6.0, 7.0, or 8.0, and a USB 1.1 port required. Transaction fees apply. Additional fees may apply for specific occurrences (including chargeback and/or retrieval fees). Transactions are subject to Association guidelines. Card swiped rate requires K23 PIN pad; sold separately. Terms, conditions, features, pricing, service, and support options are subject to change without notice.