

# Using Merchant Services in Point of Sale: Security Update **Required**

Point of Sale is introducing changes to the security of your merchant services that will require authentication of your payments account periodically.

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# What's New?

This increase in security is the current industry standard, updates in technology have allowed us to increase the security around your payments account to protect your business.

- Confirmation of your login to your payments account
  - This will let us know that your login is still up to date
  - You may also make changes at this time if you need to
- Friendly reminders to confirm your login will appear as you open your company file or do your End of Day

**qb** intuit quickbooks. QuickBooks Desktop Point of Sale

## Verify your QuickBooks Point of Sale Payments account email address

We're adding an extra layer of security to your account so your info stays safe. [Find out more](#)

Can we reach you at **User@intuit.com**? If you're unsure, ask your QuickBooks Point of Sale admin

Yes, use this email

I can access it, but I want to use a different email

No, I can't access this email – help me update it

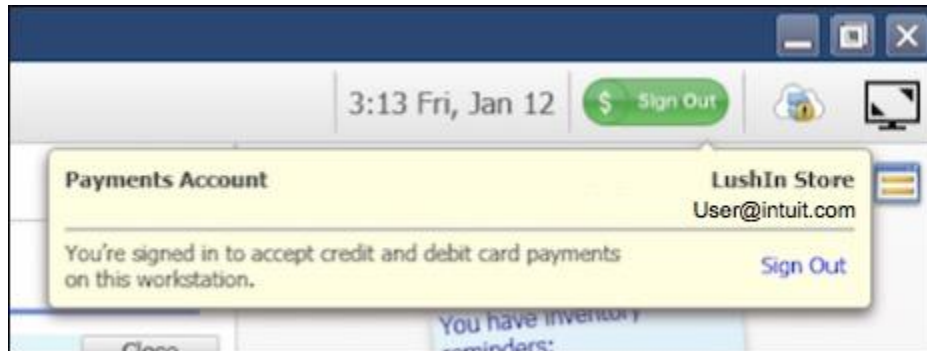
Continue

- You'll have the option to dismiss these reminders for a period of time
- Eventually, you will be required to log into your payments account to continue to process payments in Point of Sale.

***Each Point of Sale workstation will now require you to log into your payments account***

# What Do I Need to Do?

You may sign in and confirm your account at any time by accessing the Login option in the upper right-hand corner.



- You will be prompted to enter your payments login and password.
- If you do not remember your password you may choose the option to reset your password.
- If you no longer have access to the email you used to open your payments account you will need to complete an Email Change Request.
  - For more information please see our [article](#) on how to change your email.
  - To complete an Email Change Request complete this [form](#)

## Best Practices

Point of Sale will now require you to sign into your payments account for verification on each workstation every six months.

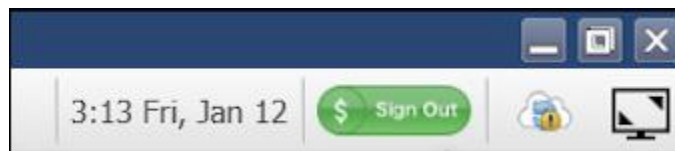
- To prevent this messaging from appearing while processing a payment, as well as having each workstation requesting verification on different dates, you may pro-actively schedule when you sign into your payments account
- To verify your payments login select the login option in the upper right-hand corner of Point of Sale
  - You will be required to do this on each workstation
- Once you have completed this sign in the first time, you will be prompted to do so again every six months.
  - You can schedule a reminder to complete this again in six months to prevent messaging from appearing while processing credit and debit cards.

# FAQs

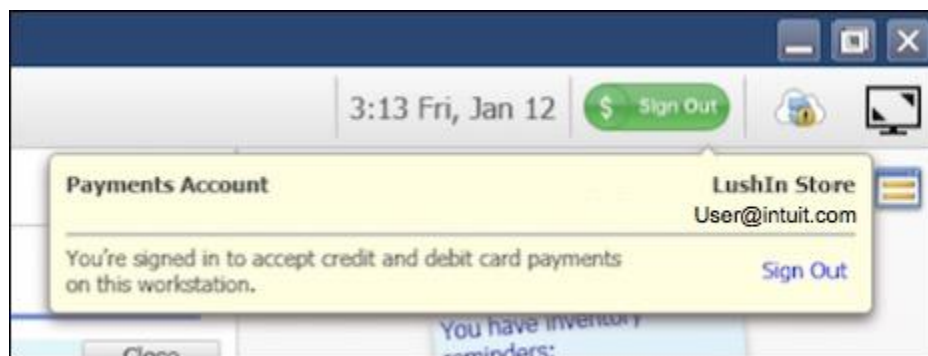
Due to security changes around your merchant services account in Point of Sale, there is a new merchant service icon and some new messaging that may appear periodically to prompt you to verify your merchant service credentials. Each message is explained in more detail below.

## Payments Icon is Green:

- When your company file is enabled for payments and you are signed into your merchant account to process the icon will be green and gives the option to Sign Out



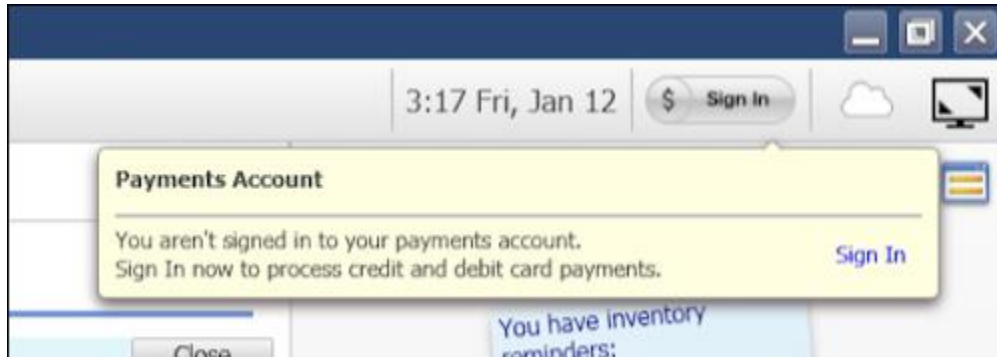
- If you select the option to sign out, the following message will appear



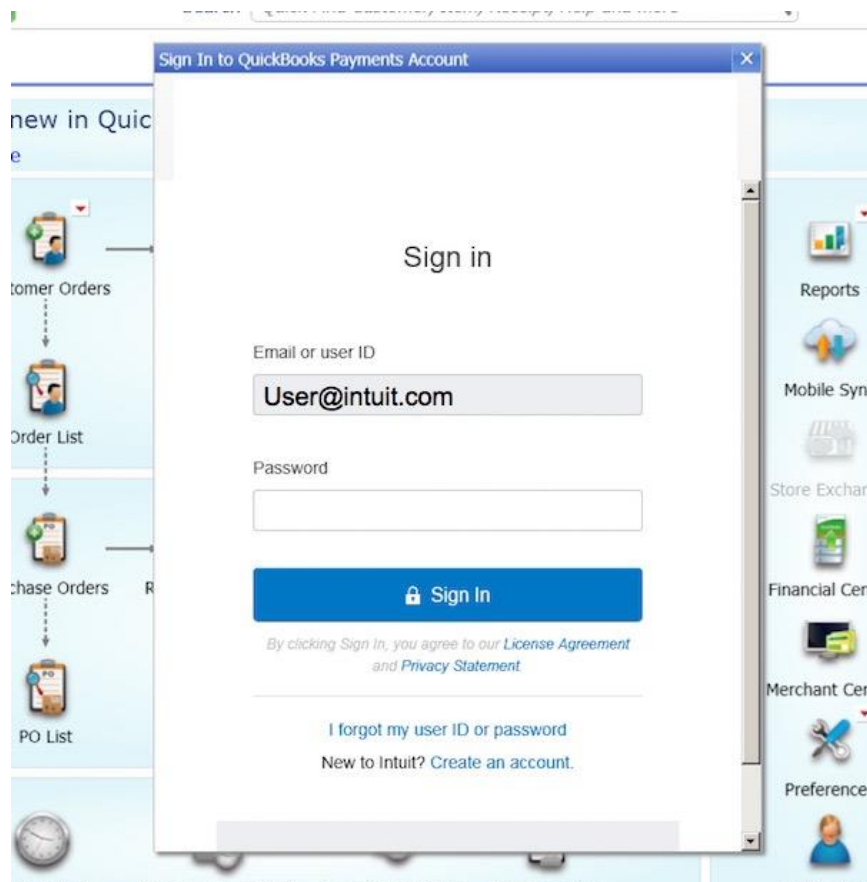
- Selecting the option to Sign Out will sign you out of your merchant account and you will not be able to process credit and debit cards *on that workstation only*.

## Payments Icon is Grayed Out:

- When your company file has been enabled for payments, but you are signed out of your payments account the payments icon in the upper right-hand side of Point of Sale will appear grayed out and will give you the option to **Sign In**



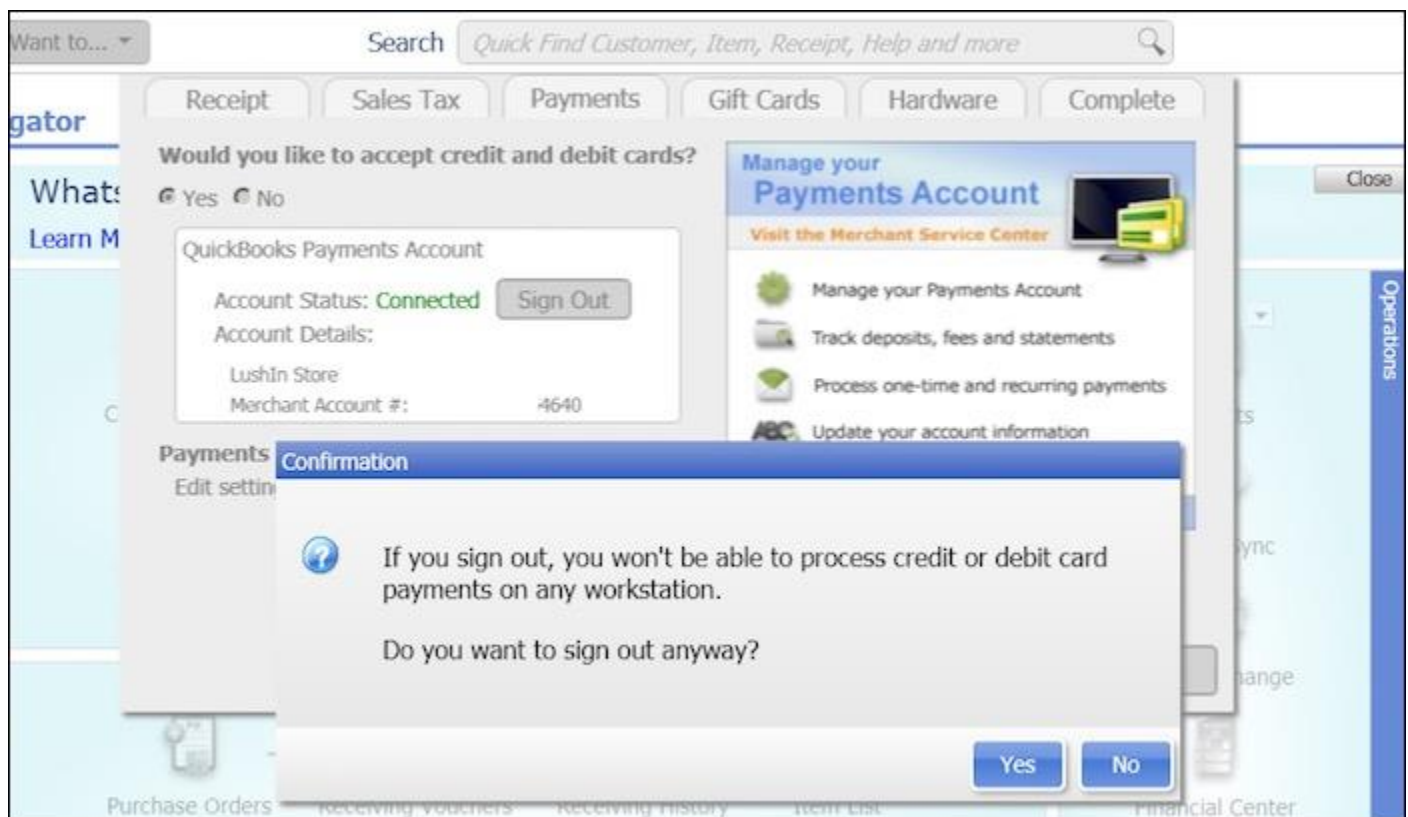
- When you select **Sign In**, the following window will appear



- The Email or user ID will already have your information pre-filled, you will only need to enter your password to sign into your merchant services account.

## Signing Out of Payments from the Setup Interview:

- If you go to **File > Setup Interview** and select the **Payments** tab and choose the option to **Sign Out**, *this will sign out all workstations from your merchant services account.*
  - Doing so will prevent all workstations from being able to process credit and debit transactions.
  - The following messaging will be displayed when choosing the option to sign out



## After Signing Out from the Setup Interview:

- After signing out of your payments account from the Setup Interview on the server, all workstations will be signed out of merchant services and will not be able to process credit or debit card payments.
  - However, there can be a delay after the initial sign out.
  - If your workstations attempt to process a credit or debit card payment after you have signed out, the following message will be displayed.

Credit Card

### Accept a Credit Card

QuickBooks Desktop Point of Sale

Amount: **\$1.00**

Card Number: [REDACTED]

Expiration Date: 12/18

Card Type: Visa

Status

**You're signed out of your payments account and can't accept payments. Ask your admin to go to File > Setup Interview and select the Payments tab to sign back in on the server workstation.**

Help Authorize Cancel

- You must sign back into your payments account from the Setup Interview on your Point of Sale server by going to **File > Setup Interview** and selecting the **Payments** tab to continue to process credit cards on all workstations.

## Completing an Email Change Request:

- If you do not have access to the email that is linked to your Intuit account, you may find more information on how to change this [here](#).

## Reminders to Refresh Your Payments Token:

- Point of sale will now prompt you to log into your merchant services account to refresh your payments token and verify your account credentials every six months.
- When you are one month away from your required refresh and verification the following message will begin to appear as a reminder



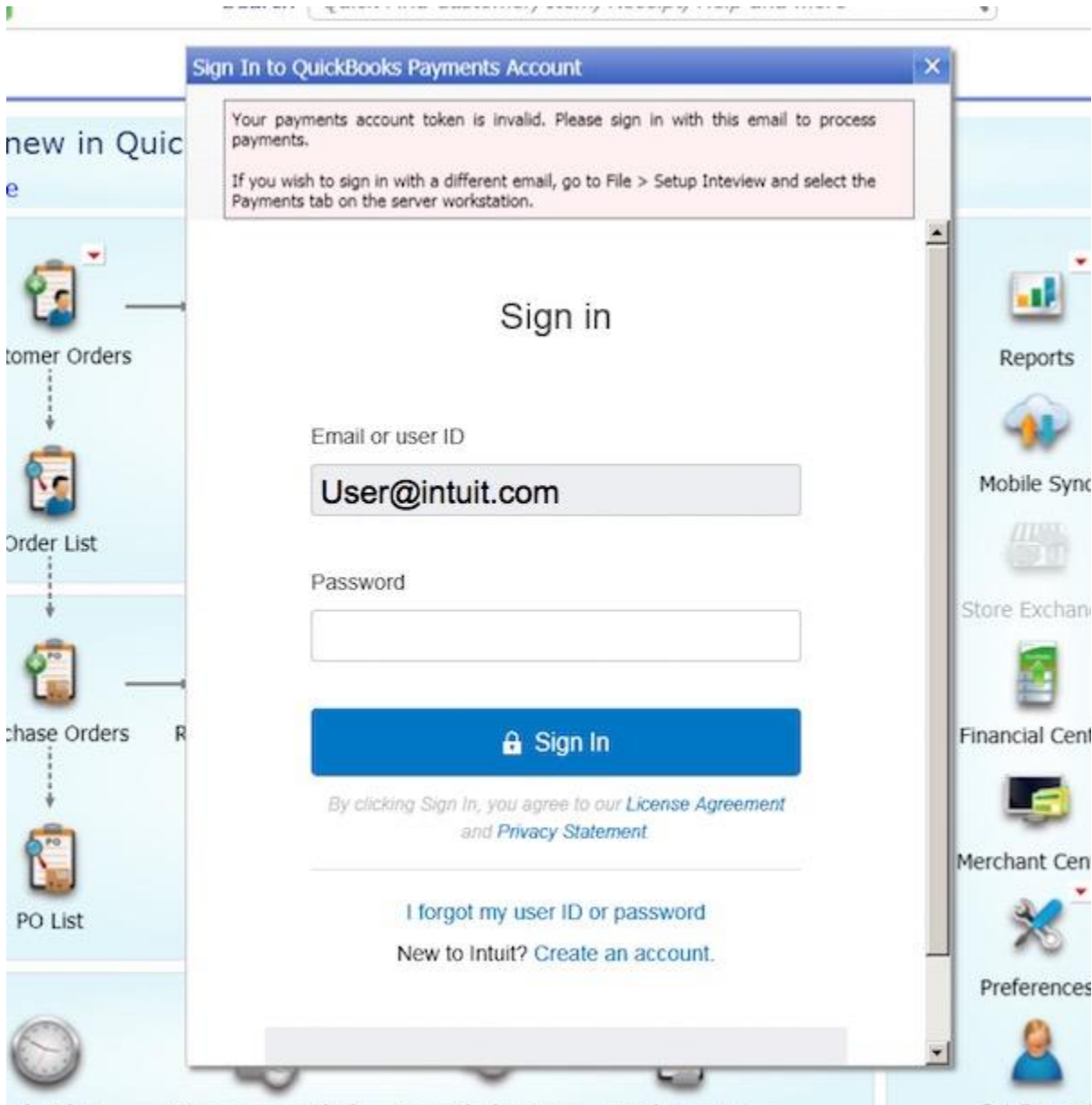
- You may click Refresh on this message to sign into your merchant account, once you have completed this task the message will not appear again until it is time to refresh your payments token again.

***REMEMBER: You must refresh your token every six months on each workstation.***



## Logging in After Your Payments Token Has Expired:

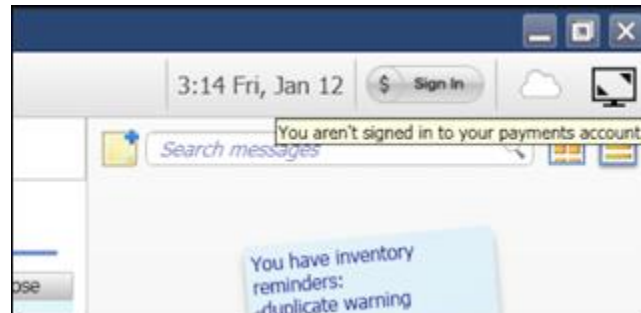
- If you do not refresh your payments token before the six months are up, you will be prompted to do so before continuing to process credit or debit cards.
- The following message will be returned



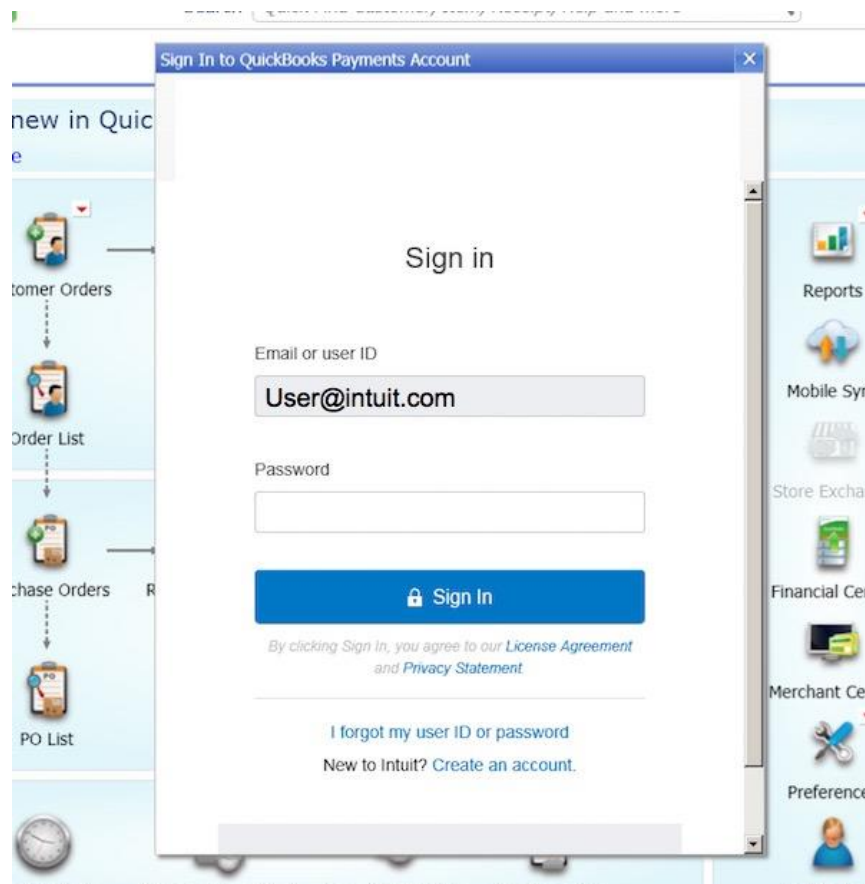
- Once you have entered your password for your merchant services account you will be able to continue processing
- If you need to change the email or user name and password to sign into a new or different merchant account, you will need to do so on the Server by going to **File > Setup Interview** and selecting the **Payments** tab.

## Payments Icon Tips:

- If you are signed out of your payments account on your workstation and you hover over the Payments Icon with your mouse the following message will appear

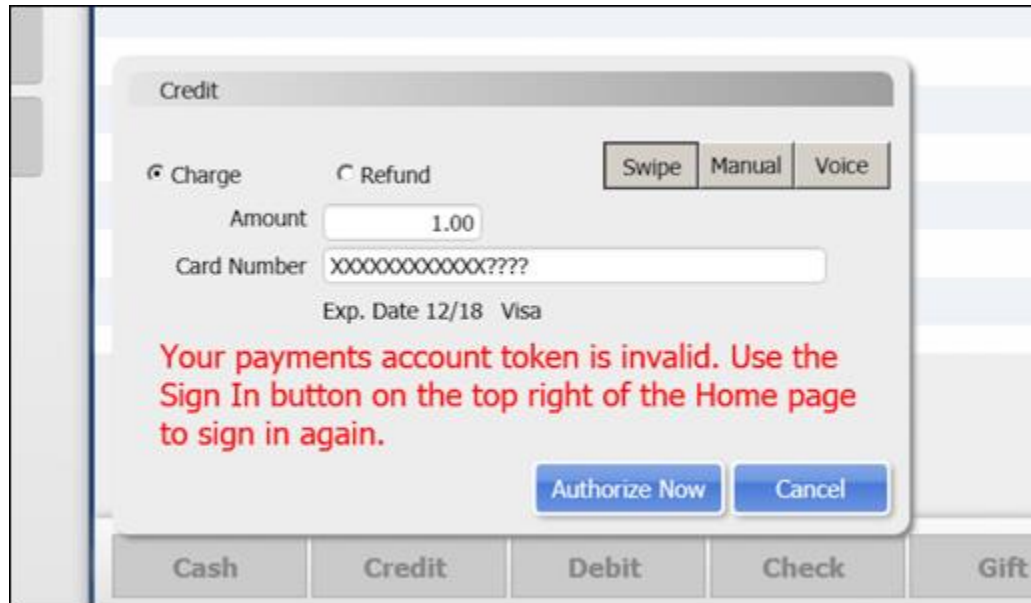


- If you select the Payments Icon it will open the Sign In window to sign into your merchant account.

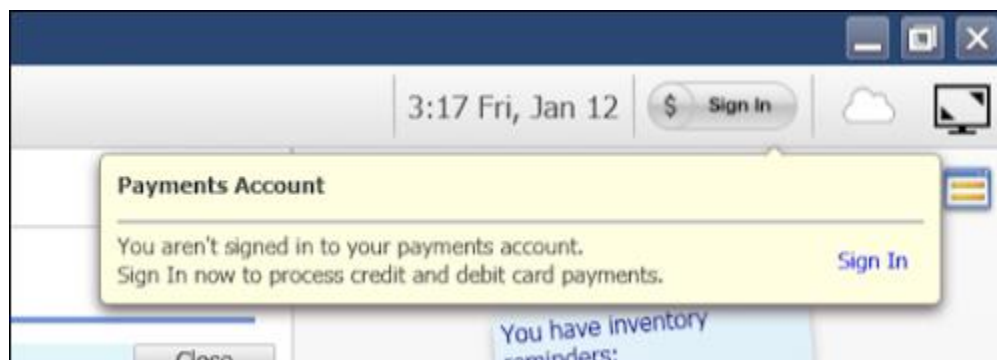


## If your Payments Token Has Expired:

- If your payments token has expired on any of your workstations and you are attempting to process a credit or debit card payment in Point of Sale, the following message will appear



- To refresh your payments token, go to the Home page in Point of Sale and select the Payments Icon in the upper right-hand corner to sign in.



## What Will Happen If I Don't Update Point of Sale?

To continue processing payments in Point of Sale, you must update to the latest release.

- For Point of Sale 18.0 this will be R3
- For Point of Sale 12.0 this will be R13

If the latest update has not been applied by May 31, 2018, the following error message will be returned when logging into your data file:

**"Network error during login. Please try again later."**



To resolve this issue, update to the latest release by going to **Help > Software Updates > Check for software updates**.

### **QUESTIONS? COMMENTS? CONCERNS?**

**Contact us @ 415-785-4095 for assistance.**

If needed, we will transfer you directly to Intuit Merchant Service Support.

Thanks!  
Business Cents