

Cardknox - Text to Invoice

Overview

Exclusive for Edge versions **23.1.0.215 or higher**, the **Text to Invoice** feature allows you to send invoices to your customers via **text** or **email** as an alternative to processing a payment immediately to complete a sale in POS. The customer will receive an invoice with a link to **pay directly** through the **Cardknox** website. This integration allows you to then load the paid invoice back into POS to complete the sale through Edge.



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

Getting Started

Cardknox Text to Invoice is a licensed-based Edge integration requiring an initial sign-up through **Cardknox**. 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 Cardknox activate this feature fill out the form:

[Text to Invoice Sign Up](#)

Setup

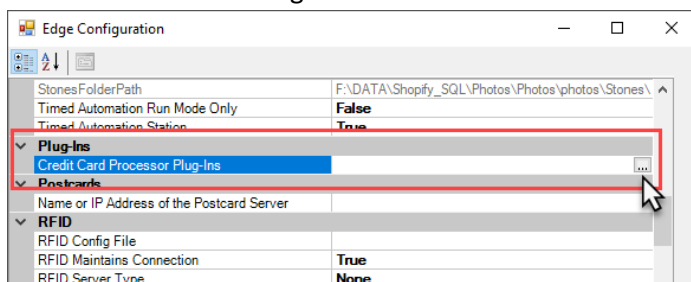
After you have successfully installed your new license, you must **Configure** and set the **System Option** for **Cardknox** which will activate the POS buttons and then create your **invoice notification templates**.

Configuration

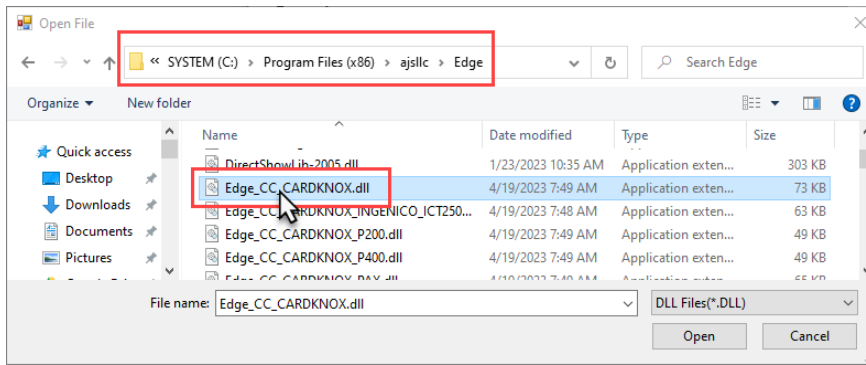
This is an important first step for using this feature and must be done on **each workstation** with a credit card reader attached.

To set the Cardknox 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.



- The **Open File** window will open. Navigate to the folder **C:\program files (x86)\ajslc\Edge** and select the file **Edge_CC_CARDKNOX.DLL**, then click **Open**.

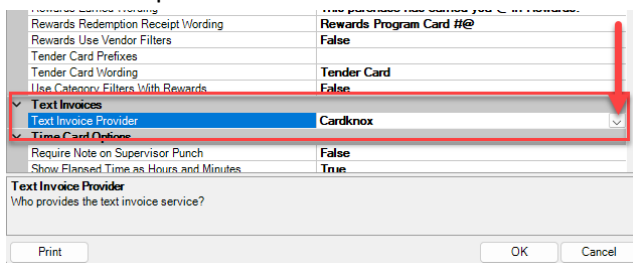


- Click **OK** to save your configuration change.

System Option

To set the System Option:

- Navigate to **Administrative > System Options**.
- Search** or **scroll** down to the **Text Invoices** section and locate the option named **Text Invoice Provider**.
- Click the drop-down arrow and select **Cardknox**.



- Click **OK** to save your changes.

Notification Templates

The **Text to Invoice** feature allows you to customize notification templates for invoices sent by text, email, or both. The Edge will **automatically** apply the system **default templates** included with Edge if you choose not to create your own, those of which you can choose to **edit** to create a more customized message or create **customized templates from scratch** right within the body using **HMTL** and available **merge fields**.

See the [Notification Templates](#) documentation for step-by-step instructions on creating templates and instructing Edge to use your templates when sending invoices.

The **default** notification templates included with Edge will include the **Cardknox** payment link as shown in the example below:

Editing Template

Name* Cardknox SMS

Type* CardknoxInvoice (Customer)

Body* `{{Store.Name}}: Invoice ready for payment {{CardknoxURL}}`

Customer
 FirstName
 LastName
 Store
 Name
 PhoneNumber
 Address
 Street1
 Street2
 State
 City
 Zip
 Merge Fields
[CardknoxURL](#)

Preview Load Default Values Save & Close Cancel

If you are creating **custom** templates from scratch, you must **manually** add the **merge field** into the body of your template for the link to be included:

Editing Template

Name* Cardknox Email

Type* CardknoxInvoice (Customer)

Email Subject* `{{Store.Name}} - Invoice ready for payment`

Body*

```
<tr>
<td align="center" class="wrapper">
<tr>
<td class="headerStoreLine">
Hello {{Customer.FirstName}} {{Customer.LastName}}
</td>
</tr>
<tr>
<td class="headerSecond">
Your invoice from {{Store.Name}} is below:
</td>
</tr>
</table>
<table class="wrapper">
<tr>
<td>
<table>
<tr>
<td class="colOne">Payment Link</td>
<td class="colTwo">{{CardknoxURL}}</td>
</tr>
<tr>
<td class="colOne"></td>
<td class="colTwo">
{{Store.Name}}<br />
{{Store.Street1}} {{Store.Street2}}<br />
{{Store.City}} {{Store.State}} {{Store.Zip}}<br />
{{Store.PhoneNumber}}<br />
</td>
</tr>
</table>
</td>
</tr>
</table>
```

Customer
 FirstName
 LastName
 Store
 Name
 PhoneNumber
 Address
 Street1
 Street2
 State
 City
 Zip
 Merge Fields
[CardknoxURL](#)

Preview Import HTML File Load Default Values Save & Close Cancel

Text to Invoice at POS

The **Text to Invoice** feature is **only** available when the following sale lines are added in POS:

- Item Purchase
- Misc Charge
- Payments for: Appraisal, Layaway, Memo, Repair, Special Order, Custom Job, and Store Charge

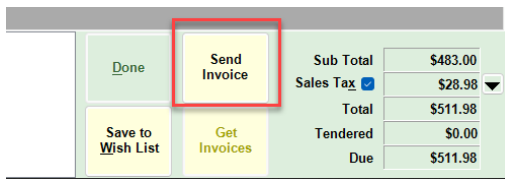
Please note that the **Text to Invoice** feature is **NOT** available for any **job intake** if the intake is the only line added to a sale.

Selling at POS with Text to Invoice

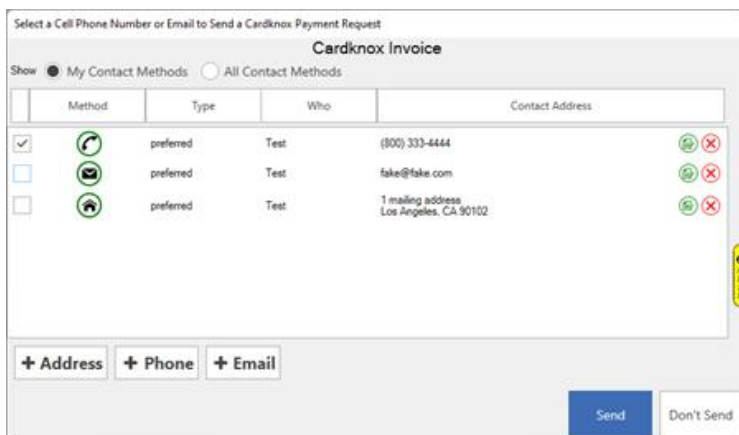
Selling items at POS with **Cardknox Text to Invoice** works just like any regular item sale at POS.

You will **find the customer** and **select the associate**, as normal, then **find/scan the item** to be sold.

Instead of clicking **Done** to complete the sale, you will instead choose **Send Invoice** from the buttons shown below:

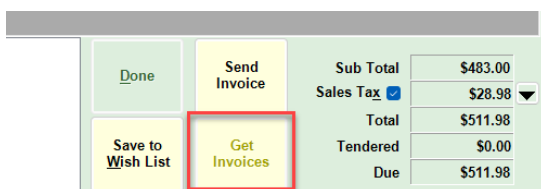


The **Cardknox Invoice** screen will appear asking you to choose where to send the invoice. Choose either a **cell phone** or **email** and click **Send**:



Edge will alert you that the invoice has been **sent**, and the customer will receive their text message or email with the payment link to pay directly through **Cardknox**.

After the customer pays you can process their payment at POS using the **Get Invoices** button.



This will bring up **Cardknox Sales Selection** window with a list of both **Paid** and **Not Paid** invoices. Highlight the **Paid** invoice you'd like to process through POS and click **Select**.

