Podium Payments

Overview

Exclusive for Edge versions **23.2.8 or higher,** The **Podium Payments** integration allows you to process payments with **Podium** directly within Edge POS. This integration includes an all-in-one **Process Credit Transactions** screen with the ability to **swipe credit cards** for quick processing, **split payments** between **multiple cards** or **multiple tender options**, process cards **manually**, and more.

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

Getting Started

Podium Payments is a licensed-based Edge integration requiring an initial sign-up through **Podium**. 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 Podium activate this feature fill out the form:
Integrate Payments with The Edge + Podium

Setup

After you have successfully installed your new license, you must **Configure** and set the **System Option** for **Podium** which will activate the POS buttons.
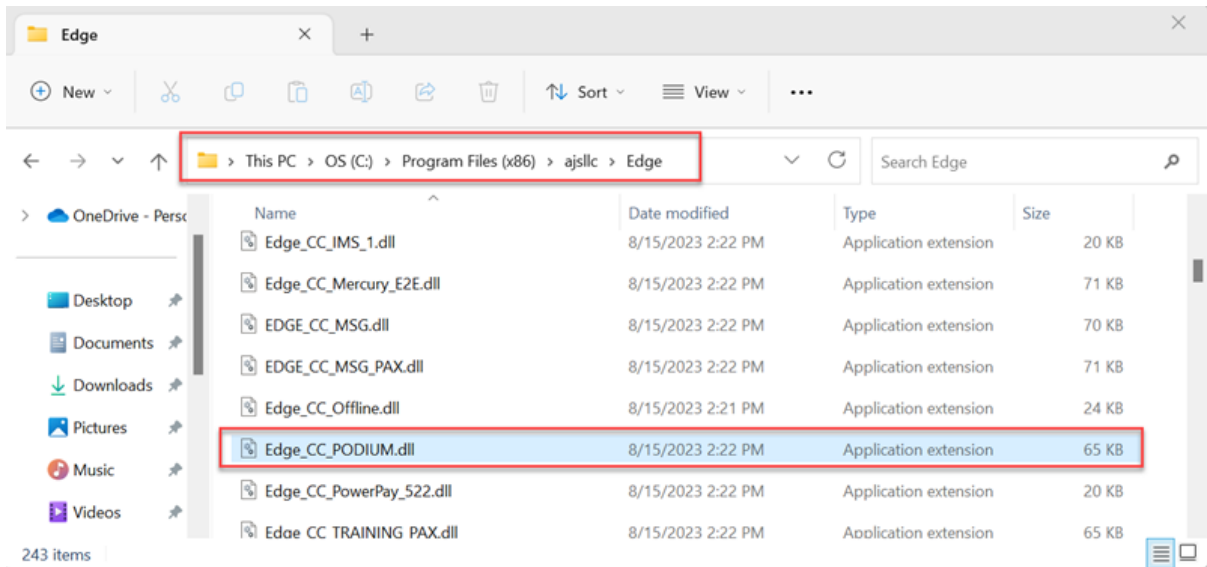
Configuration

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 Podium 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.
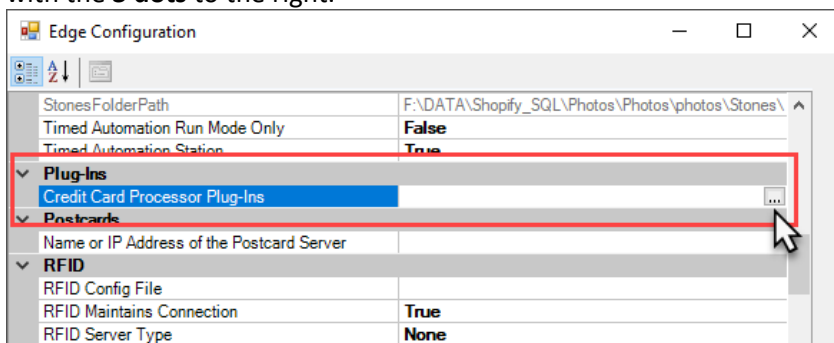
3. The **Open File** window will open. Navigate to the folder **C:\program files (x86)\ajsllc\Edge** and select the file **Edge_CC_Podium.dll**, then click **Open**.

4. Click OK to save your configuration change.

Connecting with Podium Device ID

Once you have set the **Podium DLL** and **restarted Edge**, the next step is entering your **Podium credentials** to complete the integration and begin using **Podium Payments at POS**.

To enter your **Podium** credentials:

1. Navigate to **Administrative > Credit Cards > Podium Credit Card Processing.** The **Podium Credit Card Processing** window will appear.
2. Enter your **device's ID** into the **Device ID** box.


3. Select a **notification type** (phone, email, or store's email) from the **Default Notification** drop-down. This box helps control where receipts are sent after a sale is processed in relation to the **Send Payment Confirmation** checkbox on the **Process Credit Transactions** window. Please see the **Send Payment Confirmation** section below for information on how your selection controls notifications in relation to the checkbox.

Process Credit Transactions Window

The **Process Credit Transactions** window can be accessed at **any** point during a sale once a sale line has been added by clicking the **Credit Card** button, even if the window has been closed by either clicking the **Finish** or **Close** buttons.
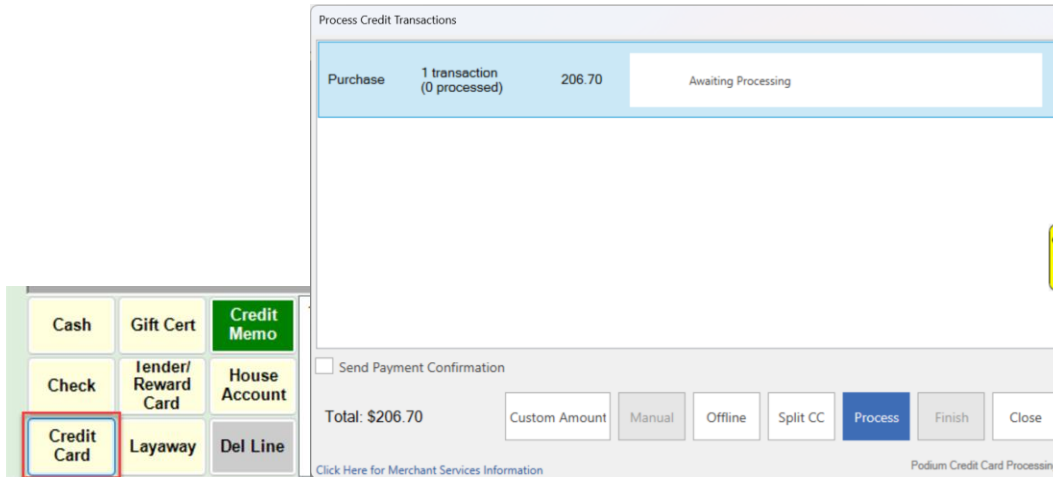
- **Custom Amount:**
  Customize the amount being charged to one credit card to **split payment** between **multiple** different tender options beyond just credit cards. **For example**, if a customer has both cash and credit card as payment and would like to pay $500.00 with the credit card and the remainder in cash, you can put $500 as the amount using the **Custom Amount** button:
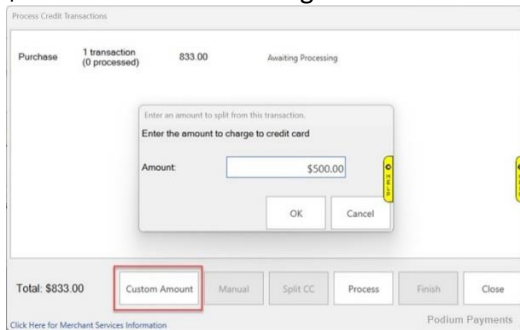

- **Manual:**
  The **Manual** option is **NOT available** for Podium Payments.

- **Offline:**
  See the **Podium Payments: Processing Offline Transactions** article for steps on processing offline transactions with Podium.

- **Split CC:**
  If a customer requests splitting payment between multiple credit cards.
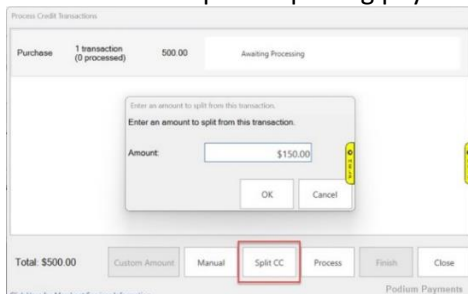
- **Process:**
Process the credit card(s). Processing a credit card using **Process** requires a card to be **swiped**. You will see a **green dot** if the charge was completed **successfully**, or you will see a **red dot** with **error message** indicating that the process **could not** be completed.
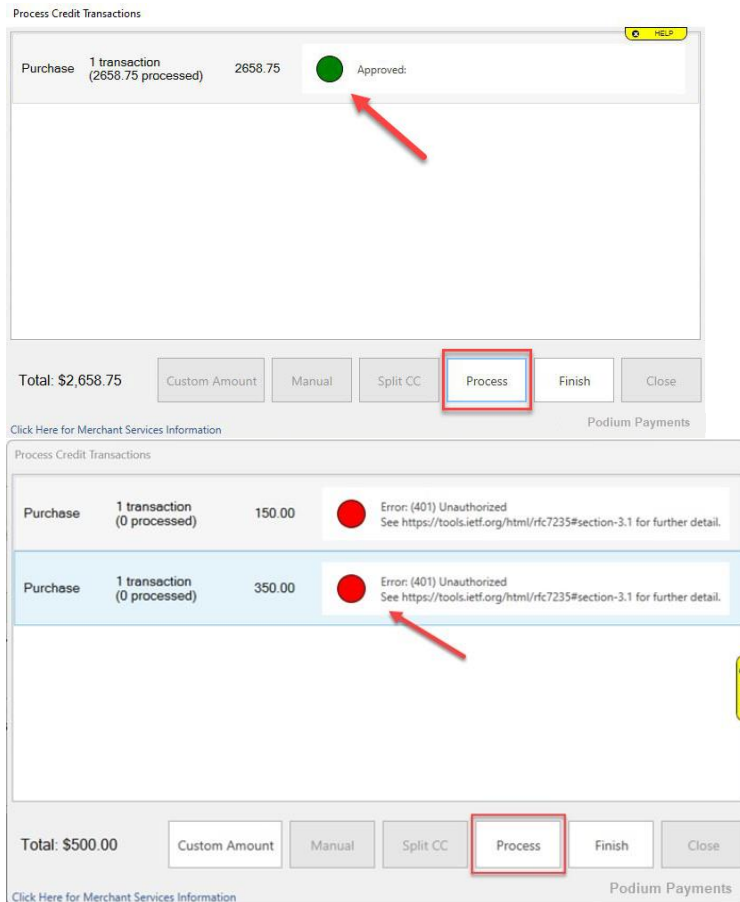
- **Finish:**
Closes the **Process Credit Card Transactions** window. This allows you to enter other tender options if a customer choice the **Customize** option, or allows you to **complete the sale** as normal by clicking **Done** if credit cards processed successfully.
NOTE: The **Finish** button is **only** enabled if credit cards have been **processed** by using either the **Process** or **Manual** buttons. If a transaction line says **Awaiting Processing**, you can **only close** out of the screen using the **Close** button.

- **Close:**
Closes the **Process Credit Card Transactions** window when transaction lines are still listed as **Awaiting Processing**. This allows you to choose an alternative tender option first, then putting the remaining balance on a credit card.

Processing Offline Transactions

The **Offline** button can be accessed from the **Process Credit Transactions** screen. Visit the **Process Credit Transactions** section above to learn more about how to process credit card transactions using the **Process Credit Transactions** screen.

Processing a sale **offline** with **Podium Payments**:

1. **Find the customer** and select the **associate**, as normal, then **find/scan** the item to be sold.
2. Click the **Credit Card** button. The **Process Credit Transactions** screen will appear.
3. Highlight the **Purchase** row and click the **Offline** button at the bottom.

4. Enter the credit card information into the fields on **Offline Credit Card Entry** screen then click **OK**.

5. The **Process Credit Transactions** screen will now show the **Purchase** line with a note indicating **offline processing** was selected, as shown below:

6. Click the **Finish** button to close the **Process Credit Transactions** screen, then **Done** to complete the sale as normal.

Send Payment Confirmation to Customer

A **Send Payment Confirmation to Customer** checkbox has been added to the **Process Credit Transactions** window that acts as a record of payment made by the customer through Podium.
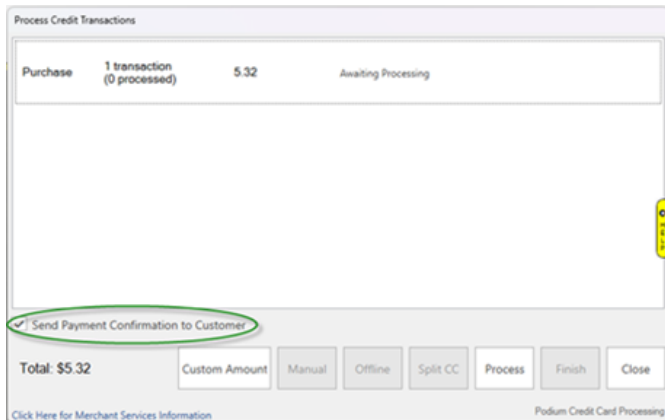

📄 **NOTE**   **This box is checked by default.** You must **manually uncheck** the box as desired for each transaction.

This box being **checked** or **unchecked** will do one of the following:

- **Checked** – Sends receipt to the **customer**. The customer will receive either an **email** or **text** based on the **Default Notification** option selected in the **Podium Credit Card Processing** window.
- **Unchecked** – Sends a copy of the receipt to the **store's email**. This **overrides** any **Default Notification** selection made on the **Podium Credit Card Processing** window and does **NOT** send a copy to the customer. A copy is **ONLY** sent to the **store's email address.**

Please note that if you **do NOT** see the **Send Payment Confirmation to Customer** checkbox, that this checkbox is **hidden** if you selected the **Store Email** notification type when setting up your **Default Notifications** on the **Setup Podium Merchant Services** screen.
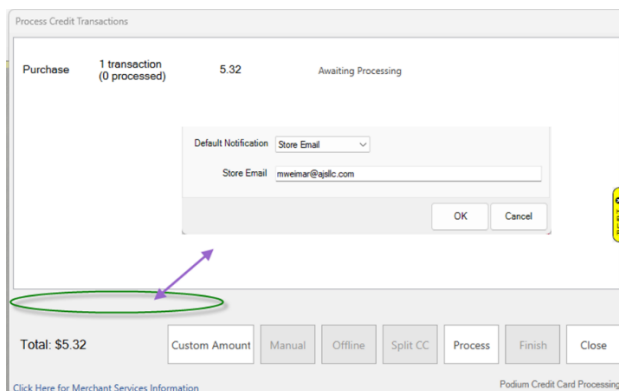
To verify your Default Notification type, or to change your selection, navigate again to **Administrative > Credit Cards > Podium Credit Card Processing.** Please see the section below on **Setting Up Default Notifications** for more details on how your selection determines where receipts are sent.

Setting Up Default Notification

Default Notification has **three** options:

- **Phone** – sends to the customer's **preferred phone number**.
- **Email** – sends to the customer's **preferred email address**.
- **Store Email** – sends to the **store's email address** and hides the **Send Payment Confirmation to Customer** checkbox. Selecting this option **eliminates** the ability to send payment confirmations to customers via email or phone.

NOTE	If the customer has a preferred phone number but **NO** preferred email address but email is selected, the customer will receive the notification to their **preferred phone number**. The same is true if a customer has no preferred phone number selected.

Special Considerations for Processing Returns with Podium Payments

If a customer come back into your store to make an **exchange** on an item, meaning an **item return** with a **new purchase** in **one transaction**, you now have the ability to charge only the **cost difference** between the two items as opposed to doing a full return followed by a new sale. This method gives customers the opportunity to purchase the new item right away **without** having to wait for **pending funds** to be returned to their card.

NOTE	If the newest purchase from the exchange is then returned, you **MUST** do **two separate returns** in order for the returns to be reflected in Edge correctly. The **original purchase** does need to be returned, as does the **difference** that was charged for the **second purchase**.