



## PROCHARGE® DESKTOP USER GUIDE

ProCharge® Desktop requires Microsoft Windows 10, 64-bit or MACOS12 (Monterey) computer(s); it is not compatible with any other operating systems or devices.

For helpful video instructions, visit: [youtube.com/epidigitalchannel](https://www.youtube.com/epidigitalchannel).

### 1. Download ProCharge Desktop

NOTE: You must be a system administrator in order to successfully download ProCharge Desktop.

- From your computer, visit <https://electronicpayments.com/products/procharge/procharge-desktop/>.
- Scroll down the page and click on the "Download ProCharge® Desktop" button. This will initiate a download of the application to your computer.

### 2. Install ProCharge Desktop

- Run the ProCharge Desktop installation software on your computer.
- Enter the custom credentials provided in your welcome email from Electronic Payments.
- Follow the installation instructions.
- Once the installation is complete, launch the application (see Step 3, *Launch ProCharge Desktop Application*).
- Repeat installation process on all computers that require the software.

### 3. Launching the ProCharge Desktop Application from Windows

- Click on the windows icon in the toolbar of your computer.
- Search for the program: ProCharge
- Click the program to launch the application.

#### Launching the ProCharge Desktop Application from MAC

- Open Finder, Select the Applications Folder, Locate the "ProCharge" application.
- This can also be done alternatively using the MAC spotlight search function.
- User can also use "Launcher" to open the ProCharge application.

## 4. Access ProCharge Desktop Menu

To access the ProCharge Desktop menu, click on the menu icon at the top left of the ProCharge Desktop application. There are three pages:

- **About**  
The **About** page lists the running version of ProCharge Desktop as well as contact information for support.
- **Settings**  
The **Settings** page is where you can modify the following settings:
  - ▶ Workstation ID
  - ▶ Auto Increment Invoice Option
  - ▶ Checkout Fee Option
    - Checkout Fee %/\$ Option, Checkout Fee Note
  - ▶ IP Configuration
    - Device Label Field, IP Entry/Setting
  - ▶ Receipt Configuration
    - Receipt Header, Receipt "Save" Option, Print Receipt Option, Receipt Width Option
- **Exit**  
**Exit** enables you to close the application.

The screenshot shows the 'PROCHARGE CONFIG' screen. At the top, there is a menu icon and the 'PROCHARGE' logo. Below the logo, the title 'CONFIG' is displayed. The settings are as follows: 'Print Receipt' is checked; 'Receipt Width' is set to 50; 'Print Header' is a text area containing 'My Business', '7800 Congress Ave', 'Boca Raton', and 'FL 3348'; 'CF Note' is a text area containing 'We have applied a Cash Discount Fee to your order'. At the bottom, there are 'Update' and 'Cancel' buttons.

## 5. Connect a ProCharge Desktop Payment Device

NOTE: Only PAX devices purchased from Electronic Payments will work with ProCharge Desktop.

The payment device may be connected by an Ethernet cable running from the red connector (on the single port connector) to the router or modem to which your computer is connected (via WiFi or hardwired). Please refer to the **ProCharge Desktop Wiring Guide** for detailed setup illustrations.

## 6. Assign a ProCharge Desktop Payment Device

To pair a computer with a ProCharge Desktop payment device:

- Open the ProCharge Desktop application.
- Under **Menu**, click **Settings**.
- In the IP Config area:
  - ▶ In the first row, enter a payment device name, e.g., Reception, Front Desk, etc. This is a required field.
  - ▶ In the IP line, enter the IP address of the connected payment device. This is a required field.
  - ▶ Press Set.
- If the line around the label turns green, the device is connected and ready for use.
- If the line around the label turns red, the device is not connected. Refer to the *Troubleshooting Steps* at the end of this document.
- Repeat with the remaining payment devices.

The screenshot shows the 'PROCHARGE CONFIG' screen. At the top, there is a menu icon and the 'PROCHARGE' logo. Below the logo, the title 'CONFIG' is displayed. The settings are as follows: 'Workstation Id' is 111; 'Auto Increment Invoice' is unchecked; 'Checkout Fee ON/OFF' is checked; 'Checkout Fee %' is 10 or \$; 'IP Config' is a table with four rows, each with 'Name' and '192.168.0.' and a 'SET' button; 'Save Receipt' is checked; 'Print Receipt' is checked; 'Receipt Width' is 50. At the bottom, there are 'Update' and 'Cancel' buttons.

## 7. Run a Sale

- Open the ProCharge Desktop application.
- Enter the **Invoice #**. The Invoice # will pre-populate if the Auto-Increment option is enabled. The Auto-Increment option is useful if you're not using an accounting or practice management software that generates invoice numbers.
- Enter the **Amount**.
- Ensure the **Sale** is highlighted green.
- A green **CF** indicates that the Checkout Fee is enabled. A red **CF** indicates that the Checkout Fee is disabled.
- Select the desired PIN pad from the drop down menu.
- Click **Process**.
- The total sale amount will be transmitted to the payment device for the customer to insert/tap/swipe/manually enter their payment card.
- If the sale is successful, the window print driver will open automatically. This will enable you to print a transaction receipt to the desired printer.

The screenshot shows the ProCharge Desktop application interface. At the top, it says "PROCHARGE DESKTOP". Below that, there is a field for "Invoice# 10011" and a field for "\$ Amount" which is highlighted with a yellow border. There are three buttons: "REFUND", "SALE" (highlighted in green), and "VOID". Below these are numeric buttons for 1, 2, 3, 4, 5, 6, 7, 8, 9, a decimal point, 0, and a back arrow. At the bottom, there are "Clear", "CF" (highlighted in green), and "Process" buttons. A dropdown menu at the very bottom shows "My PinPad" with a left arrow.

## 8. Process a Refund

- Open the ProCharge Desktop application.
- Enter the **Invoice #**.
- Enter the **Amount**.
- Ensure the **Refund** is highlighted red.
- A green **CF** indicates that the Checkout Fee is enabled. A red **CF** indicates that the Checkout Fee is disabled.
- Select the desired PIN pad from the drop down menu.
- Click **Process**.
- The total refund amount will be transmitted to the payment device for the customer to insert/tap/swipe/manually enter their payment card.
- If the refund is successful, the window print driver will open automatically. This will enable you to print a transaction receipt to the desired printer.

## 9. Process a Void

- Open the ProCharge Desktop application.
- Enter the **Auth #** from the payment receipt or payment log.
- Enter the last 4 digits of the card used to make the original payment. This can be found on the payment receipt or payment log.
- Ensure **Void** is highlighted blue.
- A green **CF** indicates that the Checkout Fee is enabled. A red **CF** indicates that the Checkout Fee is disabled.
- Click **Process**.
  - ▶ ProCharge Desktop will route the void to the original PIN pad where the sale was completed.
- The void request will be transmitted to the payment device. There is no need to enter in the card information.
- If the void is successful, the window print driver will open automatically. This will enable you to print a transaction receipt to the desired printer.

**NOTE:** A void can only be processed for a transaction prior to batch closing.

## 10. Assign a Workstation ID

- Open the ProCharge Desktop application.
- Under **Menu**, click **Settings**.
- In the **Workstation ID** field, enter the Workstation ID.
- Click **Update** at the bottom to save the setting.

## 11. Invoice Number Options

- Open the ProCharge Desktop application.
- Under **Menu**, click **Settings**.
- The “Auto Increment Invoice” option can be turned on or off with a checkmark.
  - ▶ Auto Increment – ON  
If selected, you’ll have the option to enter an initial invoice number. ProCharge Desktop will auto-increment by 1 for every transaction processed.
  - ▶ Auto Increment – OFF  
If selected, you’ll have the option to manually enter or exclude invoice numbers.
- Click on **Update** at the bottom to save the setting.

## 12. Checkout Fee (CF)

- Open the ProCharge Desktop application.
- Under **Menu**, click **Settings**.
- There are three (3) Checkout Fee options:
  - ▶ Enable/Disable the Checkout Fee (feature can be turned on and off)
    - **On:** Indicates that every transaction will automatically apply a Checkout Fee
    - **Off:** Indicates that every transaction will NOT apply a Checkout Fee
  - ▶ Define the Checkout Fee
    - Pick Checkout Fee percentage or dollar amount: % OR \$ (you can only pick one option)
    - Enter the desired percentage or dollar amount in the appropriate field
  - ▶ Checkout Fee Receipt Message
    - You can update the default receipt message to clearly disclose the Checkout Fee. The default message is: “We have applied a Cash Discount Fee to your order.”
- Click on **Update** at the bottom to save the setting.
- On the payment keypad screen, there is a **Checkout Fee (CF)** indicator at the bottom to indicate whether the Checkout Fee setting is enabled or disabled:
  - ▶ If the CF indicator is green, the Checkout Fee is enabled.
  - ▶ If the CF indicator is red, the Checkout Fee is disabled.

## 13. Customize Receipt Header Details

- Open the ProCharge Desktop application.
- Under **Menu**, click **Settings**.
- In the **Print Header** area, update the information as desired. This information will be displayed on the receipt header.
- Click on **Update** at the bottom to save the setting.
- A copy of all receipts will be saved automatically in the Documents folder, under “ProChargeReceipts.”

## 14. Close the Application

- Open the ProCharge Desktop application.
- Under **Menu**, click **Exit** to close the application.

## 15. Access Transaction Logs

A copy of each transaction will be saved in your Documents folder as "payments.csv". The file will automatically update with every new transaction. Please ensure this file is closed when running transactions.

## Troubleshooting Steps

If your PAX device will not connect to your computer, please follow these steps:

1. Open the "Command Prompt" program on your computer. Where the cursor is blinking, type **ipconfig** and press **enter**.
2. Note down the IPv4 Address: e.g., 192.168.0.101
3. Now go to the PAX terminal and power cycle the device. Upon reboot, it will display several startup screens and flash the device's IP address. Ensure the PAX IP and computer's subnet match. For example, if your computer's IP is **192.168.0.101**, then your PAX device's IP should be **192.168.0.XXX**.
  - a. If the subnet does not match, then refer to the wiring diagram to ensure the devices are wired correctly.
4. If the subnet matches, then try to ping the PAX device from your computer.
  - a. Open "Command Prompt". Where the cursor is blinking, type **ping 192.168.0.XXX** (IP of the PAX) and press enter.
  - b. It will take a few minutes to either ping the device or time out. If you're able to ping the device successfully, then move on to step 5. If not, then double check the wiring and verify that the IP was entered correctly.
5. Lastly, confirm that the ProCharge services are running.

### i. Windows

Open a windows program called "Services". Scroll down to "ProChargeLRC" and "ProChargeLRS" and verify that their status is set as "Running." If not, then restart the service(s).

### ii. MAC

MACOS is not a service-based operating system like windows. The closest thing that exists is the MAC Activity Monitor where processes can be killed. The Activity Monitor is accessed via the Applications Folder, Utilities, Activity Monitor.

6. Try to configure the PAX IP in ProCharge Desktop again and click on "Set."
7. Firewalls

### i. Windows

If you have a firewall, you may need to allow the program through the Windows Firewall. To do so, please follow these steps after installing the ProCharge Desktop application:

- a. From the Windows start menu, search for "Windows Defender Firewall."
- b. From the left menu, click on "Allow an app or feature through Windows Defender Firewall."
- c. At the bottom, click on "Allow another app..."
- d. Click "Browse" and go to C:\Program Files (x86)\Procharge\services\LRC\LRC-win.exe, then click "Add."
- e. Follow the same steps as in step #4 and add C:\Program Files (x86)\Procharge\services\LRS\LRS-win.exe.
- f. Click "OK" to save these two exceptions and try to associate the IP address again

## **ii. MAC**

To allow the program through a MAC firewall, please follow these steps after installing the ProCharge Desktop application:

- a. Launch Settings
- b. Select Security and Privacy
- c. Select Firewall
- d. If needed toggle the lock to make changes (depends on user's settings)
- e. Select Firewall Options
- f. Select the + button to add an exception for the Procharge application
- g. Select Add, and set to "Allow incoming connections"
- h. Click OK
- i. Click the lock to prevent any other changes

**If you require assistance, contact Technical Support at 800-966-5520 – Option 3 or [techsupport@electronicpayments.com](mailto:techsupport@electronicpayments.com).**