

Setting up Cloud 9 Pay

How to set up and add
accounts for Cloud 9 Pay

ENABLE THE APP PREFERENCE

Go to Edit > Setup > App Preferences and ensure the “EnableCloud9Pay” application preference is set to “True.” If it does not exist or is set to False, check with your system administrator and/or Cloud 9 Support to have it verified and/or added.



The screenshot shows a web interface for managing app preferences. At the top, the title "Setup" is centered, and a "Close" button is in the top right corner. Below the title, there are three action buttons: "+ Add" (blue), "Edit" (blue with a pencil icon), and "Delete" (red with an 'x' icon). To the right of these buttons, there is a "Preference Type" dropdown menu set to "(All)", a search input field containing "cloud9pay", and a "Show Deleted" button. Below this is a table with the following structure:

<input type="checkbox"/>	Key	Value	Employee	Location
<input type="checkbox"/>	EnableCloud9Pay	True		

At the bottom left of the table area, it says "Showing 1 to 1 of 1 rows".

SETTING UP CLOUD 9 PAY

Select the Payment Account for Cloud 9 Pay as pictured here.

Note: This is only visible to admin accounts

Patient Statuses
Patient Types
Payer Codes
Payment Account - Cloud 9 ...
Payment Account - FIS
Payment Account - XWebs

From here, click the "+ Add" button.

[+ Add](#) [Edit](#) [Delete](#) [Restore](#)

Description



SETTING UP A PAYMENT ACCOUNT (1)

Column	Data
Description	What the office will see and whatever they want to name. IE: Marietta
User Name	Provided by BridgePay
Password	Provided by BridgePay
Merchant Code	Provided by BridgePay
Merchant Account Code	Provided by BridgePay
Base API URL	https://www.bridgepaynetsecuretest.com/
ACH URL	https://ws.eps.profitstars.com/PV/TransactionReporting.aspx
EMV URL	https://pgc.bridgepaynetsecuretest.com
TokenPay Public Key	Provided by BridgePay

The screenshot shows a web form titled "Edit Cloud 9 Pay" with the following fields and values:

- Description: Cloud 9 Pay Test
- User Name: cin063test
- Password: [Redacted]
- Merchant Code: 14002000
- Merchant Account Code: 14002001
- Base API URL: <https://www.bridgepaynetsecuretest.com/>
- ACH URL: <https://ws.eps.profitstars.com/PV/TransactionReporting.aspx>
- EMV URL: <https://pgc.bridgepaynetsecuretest.com>
- TokenPay Public Key: tokenpay56041api20234618024615266
- TokenPay Private Key: [Redacted]
- Entity ID: 699785
- Store ID: 2428201
- Store Key: [Redacted]
- Location ID: 4996013
- POS Device: KEYED

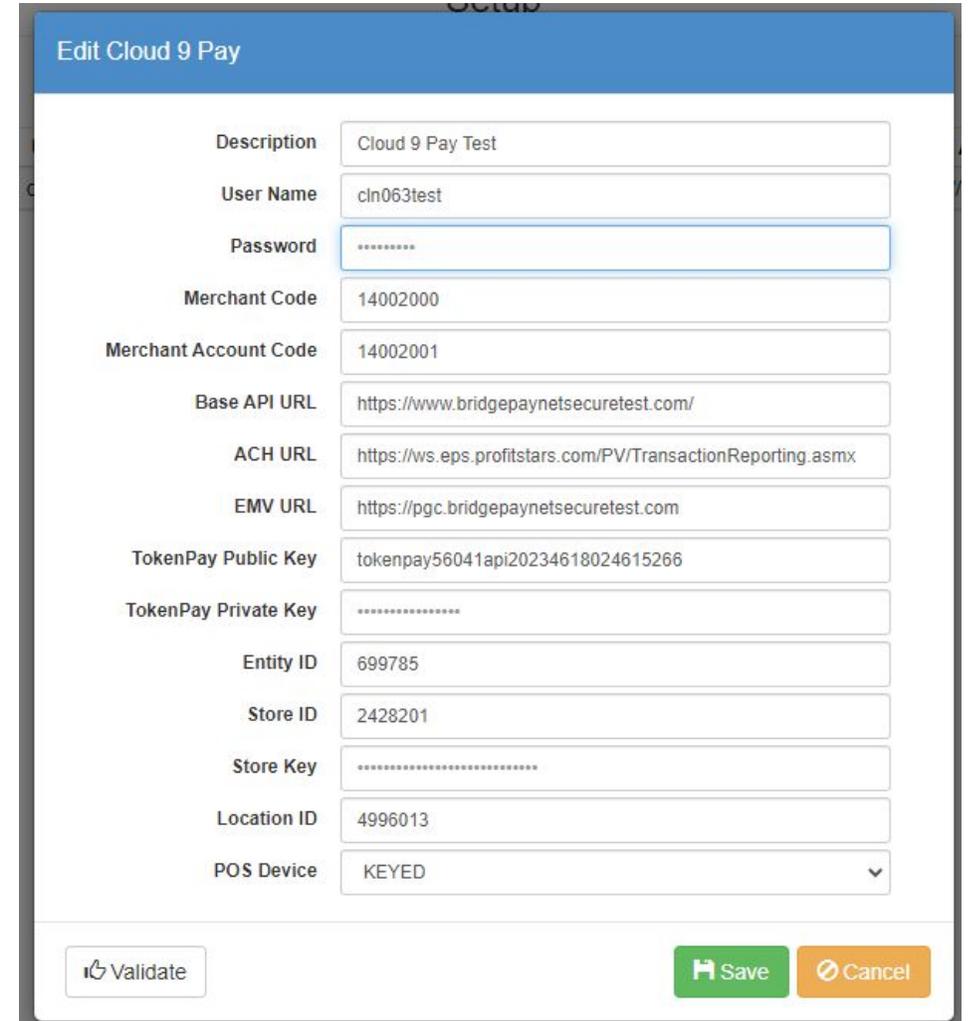
At the bottom of the form, there are three buttons: "Validate" (with a refresh icon), "Save" (green), and "Cancel" (orange).

SETTING UP A PAYMENT ACCOUNT (2)

TokenPay Private Key	Provided by BridgePay
Entity ID	Provided by Jack Henry
Store ID	Provided by Jack Henry
Store Key	Provided by Jack Henry
Location ID	Provided by Jack Henry

The above tables illustrate where to get the information to fill out this window.

- Description field is whatever the practice wants it to be.
- URL fields are universal and always the same.
- All other fields are provided by the listed sources.



The screenshot shows a web form titled "Edit Cloud 9 Pay". The form contains the following fields:

- Description: Cloud 9 Pay Test
- User Name: cln063test
- Password: [Redacted]
- Merchant Code: 14002000
- Merchant Account Code: 14002001
- Base API URL: https://www.bridgepaynetsecuretest.com/
- ACH URL: https://ws.eps.profitstars.com/PV/TransactionReporting.asmx
- EMV URL: https://pgc.bridgepaynetsecuretest.com
- TokenPay Public Key: tokenpay56041api20234618024615266
- TokenPay Private Key: [Redacted]
- Entity ID: 699785
- Store ID: 2428201
- Store Key: [Redacted]
- Location ID: 4996013
- POS Device: KEYED (dropdown menu)

At the bottom of the form, there are three buttons: "Validate" (with a refresh icon), "Save" (green), and "Cancel" (orange).

VALIDATING

Clicking the "Validate" button will allow you to ensure the account is set up correctly.

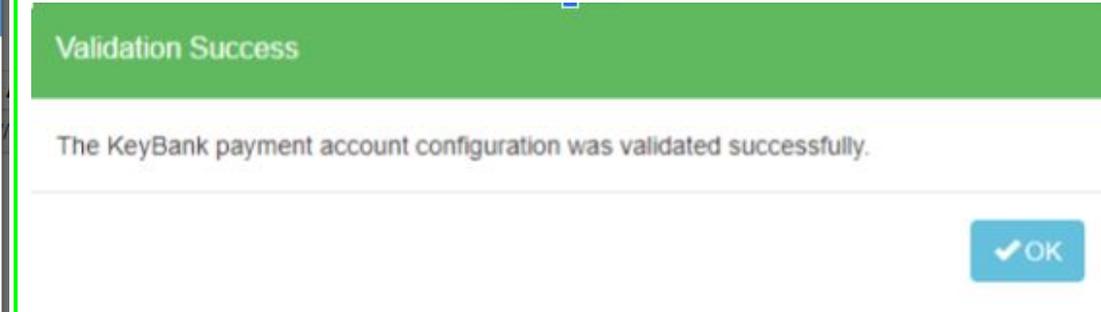
The screenshot shows a form titled "Edit Cloud 9 Pay" with the following fields:

Description	Cloud 9 Pay Test
User Name	cln063test
Password	*****
Merchant Code	14002000
Merchant Account Code	14002001
Base API URL	https://www.bridgepaynetsecuretest.com/
ACH URL	https://ws.eps.profitstars.com/PV/TransactionReporting.asmx
EMV URL	https://pgc.bridgepaynetsecuretest.com
TokenPay Public Key	tokenpay56041api20234618024615266
TokenPay Private Key	*****
Entity ID	699785
Store ID	2428201
Store Key	*****
Location ID	4996013
POS Device	KEYED

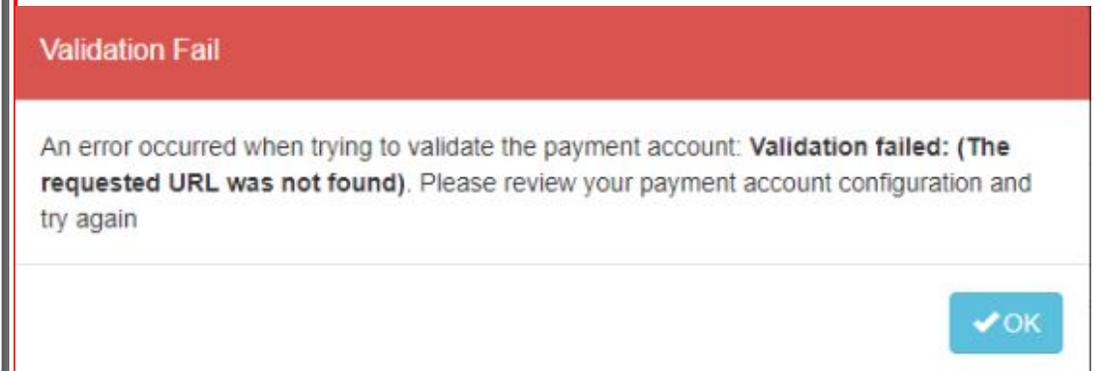
At the bottom of the form, there are three buttons: "Validate" (with a checkmark icon), "Save" (green), and "Cancel" (orange). A red arrow points from the text on the left to the "Validate" button.

When finished, click "Save."

You should see this popup if the account is properly configured:



If you receive the window pictured below, check the information entered:



NOTE: The error message may vary depending on the issue; make note of what it says—that may be a clue of what to fix.

PRACTICE INFORMATION SETUP

Next, navigate to Edit > Practice Information, and select the Payment Processor tab.

Processor should be "Cloud 9 Pay." POS will be the account you set up in "Payment Accounts – Cloud 9 Pay." Check the "Required CVV" and "Show Address" boxes as desired/required by your account.

The screenshot shows the "Practice Information" setup interface. At the top right, there are three buttons: "Save" (green), "Save and Close" (green), and "Cancel" (orange). Below these is a horizontal menu with tabs: "Options", "Insurance", "Check-In", "Forms", "Images", "Electronic Claims", "License", "EDI", "eStatements", "Payment Processor" (highlighted in blue), "E-Mail Server", "Patient Portal", "Security", "Third Party", and "Modules". The "Payment Processor" tab is active, displaying the following settings:

- Processor: Cloud 9 Pay (dropdown menu)
- POS: Cloud 9 Pay Test (dropdown menu)
- Required CVV:
- Show Address:

NOTE: If you have Location-specific settings, they will take precedence over these Practice Info settings

LOCATION SETUP

Navigate to Edit > Setup > Locations.

Check the box next to the Location you wish to set up and click the "Edit" button.

Setup

<input type="checkbox"/>	Name	Code	Payment Processor	POS	Auto Payment
<input type="checkbox"/>	Anniston	123	KeyBank	Cloud 9 Pay	
<input type="checkbox"/>	Atlanta	111	XWeb	NEW - Open Edge KEYED	NEW - Open Edge KEYED
<input type="checkbox"/>	Atlanta Pediatrics	app	None		
<input type="checkbox"/>	Cami Test	0102	None		
<input type="checkbox"/>	Cami's Place	451	None		
<input type="checkbox"/>	Canton	CAN	XWeb	EMV	EMV
<input type="checkbox"/>	Central TZ	12	XWeb	Practice	Practice
<input type="checkbox"/>	Elijay	ELJY	XWeb	EMV	EMV
<input type="checkbox"/>	Fantasia	006	XWeb		
<input type="checkbox"/>	Hans Loc	HAN	XWeb	Hans	Hans
<input type="checkbox"/>	Jasper	JAS	XWeb	Practice	Practice
<input type="checkbox"/>	Jimena's Location	8888	FIS	FIS Test Account	
<input type="checkbox"/>	JLocation	4353	XWeb	Practice	Practice
<input type="checkbox"/>	Kennesaw	KEN	XWeb	Practice	Practice
<input type="checkbox"/>	mergeloc	mloc	FIS	FIS Account 2	
<input type="checkbox"/>	Neverwhere	5010	None		
<input type="checkbox"/>	Pacific TZ	TZ	XWeb	Practice	Practice
<input type="checkbox"/>	qalocation	qa	None		
<input type="checkbox"/>	Sandy Lake	Sand	XWeb	NEW - Open Edge KEYED	NEW - Open Edge KEYED
<input type="checkbox"/>	test	tes1	XWeb	OLD - Open Edge	OLD - Open Edge

LOCATION SETUP

Select the "Payment Processor" tab.

Select "Cloud 9 Pay" as the Processor, and the payment account you set up in "Payment Accounts - Cloud 9 Pay" as the POS. Check "Required CVV" and/or "Show Address" as desired/required by account.

Edit Location

Name: Atlanta

Printed Name: Atlanta

Parent Code: Cen

Code: 111

Contact Info

Type	Contact Info	Description
Work	(404) 474-2653	Work

Showing 1 to 1 of 1 rows

Street: 123 Central Road

Postal Code: 20016

City: Washington

State: DC

Time Zone: (UTC-05:00) Eastern Time (US & Canada)

Insurance Check-In **Payment Processor** Patient Portal Images

E-Mail Server Other

Processor: Cloud 9 Pay

POS: Cloud 9 Pay

Required CVV

Show Address

[Save](#) [Cancel](#)

EMV DEVICE SETUP

Once Cloud 9 Pay has been configured, a new setup item called “EMV Devices - Cloud 9 Pay” will be available.

From this screen, you can view the Devices and Locations they are attached to at a glance. To configure them, check the box next to the specific EMV device you wish to work with, and select the “Edit” button.

Employee Types
Employees
Employers
EMV Devices - Cloud 9 Pay
EMV Devices - FIS
Fee Schedule
Fee Schedule Types

Setup

Close

[+ Add](#) [Edit](#) [Delete](#)

Location (All)

Search

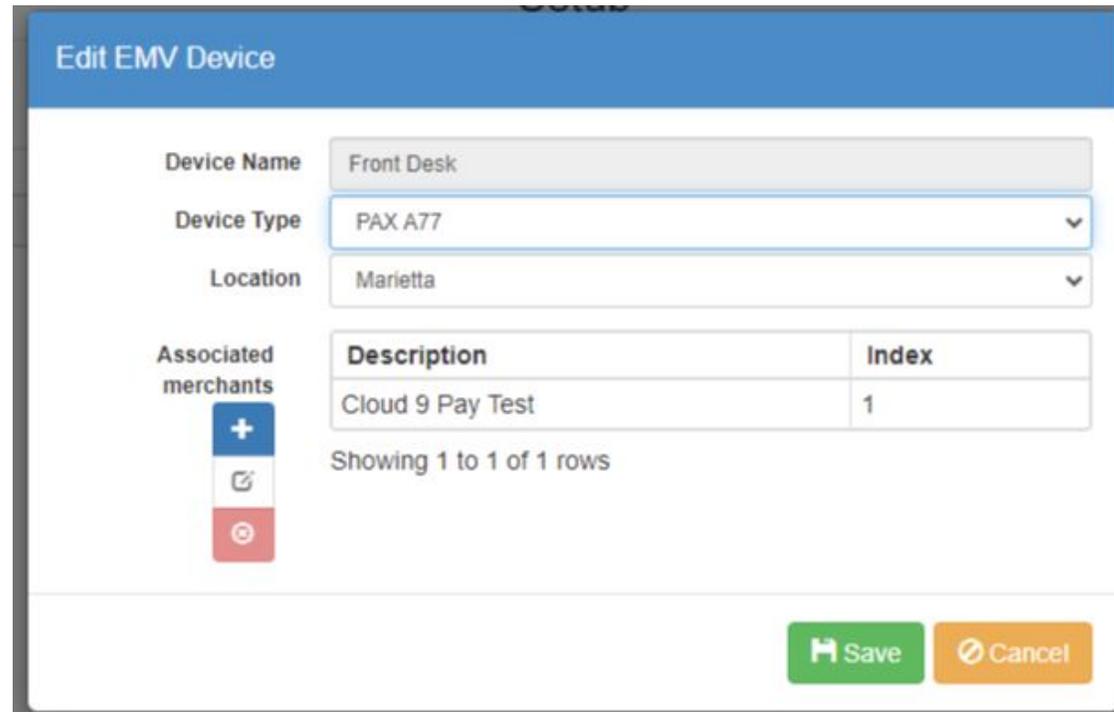
<input type="checkbox"/>	Device Name	Device Type	Location	Terminal ID
<input type="checkbox"/>	Front Desk	PAX A77	Marietta	c6a212cd-5935-4590-afe0-dca41999af66

Showing 1 to 1 of 1 rows

EMV DEVICE SETUP

This feature allows an EMV device to travel between locations, letting a clinic use one device at multiple locations. Simply navigate to this setting and change the location associated with the device if you need to use it at a different location. Be sure to also change the associated merchant if the location uses a different payment account.

NOTE: The “Index” number will determine the order in which accounts are shown if multiple options are available.



The screenshot shows a web form titled "Edit EMV Device". It contains the following fields and elements:

- Device Name:** A text input field containing "Front Desk".
- Device Type:** A dropdown menu with "PAX A77" selected.
- Location:** A dropdown menu with "Marietta" selected.
- Associated merchants:** A table with two columns: "Description" and "Index". It contains one row with "Cloud 9 Pay Test" and "1". Below the table, it says "Showing 1 to 1 of 1 rows".
- Merchant Actions:** A vertical stack of three buttons: a blue "+" button, a white edit icon button, and a red "-" button.
- Footer:** Two buttons at the bottom right: a green "Save" button and an orange "Cancel" button.

YOU'RE ALL SET!

You can now process payments via Cloud 9 Pay at the configured locations.

For any additional questions regarding this process, Cloud 9 Support is happy to assist:

Phone: 1-800-394-6050 OPTION 2*

Email: cloud9support@planetdds.com