

Helper's Credit Card Processing Setup Instructions

Get your Clover Connect Credentials

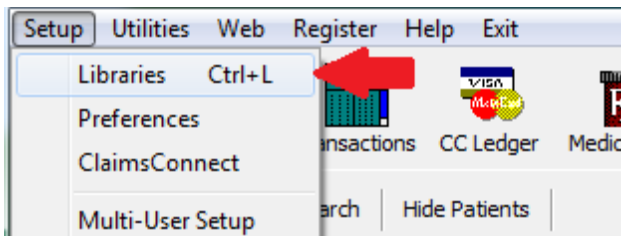
If you have not already signed up with Clover Connect to establish a new account, please contact sales@helper.com or go to <https://integrate.clover.com/partner/netsmart> to get started.

Accounts are typically onboarded within one business day. Upon successful creation of your Clover Connect account, the representative will give you a Merchant ID and API credentials (Username and Password) that you can enter into Helper as indicated below.

Helper version 9.6 or later is required for utilizing this feature.

Updating Credit Card Settings for each Therapist/Provider

1. In Helper, go to Setup/Libraries



2. Next, select and edit the therapist's name.

- Primary
- Accounts
- Facilities
- Insurance Companies
- Lawyers
- Medications
- Programs
- Services
- Therapists**
- Referring Physicians

Therapists

To search, click in any column and begin typing

Drag a column header here to group by that column

ID	Status	Last Name	First Name	MI	Address 1	Address 2
A	■	Johnson	Robert		4950 College Blvd.	
C	■	Ryan	Jack		4950 College Blvd.	

3. On the therapist screen, click on the Credit Card Info. Tab. Enter the Merchant Id, Username and Password provided by Clover Connect. Save the therapist screen.

General | Claim Settings | Supervisor | Schedule | Credit Card Info.

Enter the information assigned to you by the credit card processor.

If this Therapist has the same information as another Therapist, you can [copy this information from another Therapist.](#)

Merchant ID	<input type="text" value="496160873888"/>
Username	<input type="text" value="testing"/>
Password	<input type="password" value="*****"/>

You are now ready to begin processing payments! To watch a video on processing a payment, see <https://helper.com/videos/helper-credit-card-processing/>.