

# Helper 9.5 Credit Card Set Up

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**Netsmart**  
Helper

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## Get your CardConnect Credentials

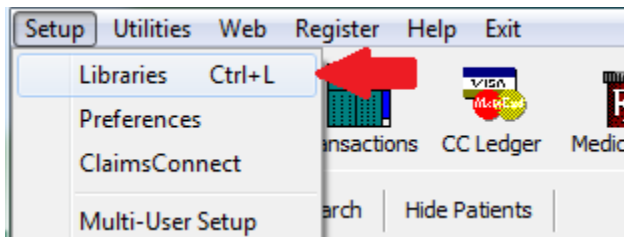
If you have not already sent this information to Helper or CardConnect, please send an email to CardConnect at [signup@cardconnect.com](mailto:signup@cardconnect.com) with the following:

- Name (of person who owns the business)
- Name of the Business (DBA)
- Primary email address
- Primary phone number
- Indicate New Expedite Customer or Existing Expedite Customer

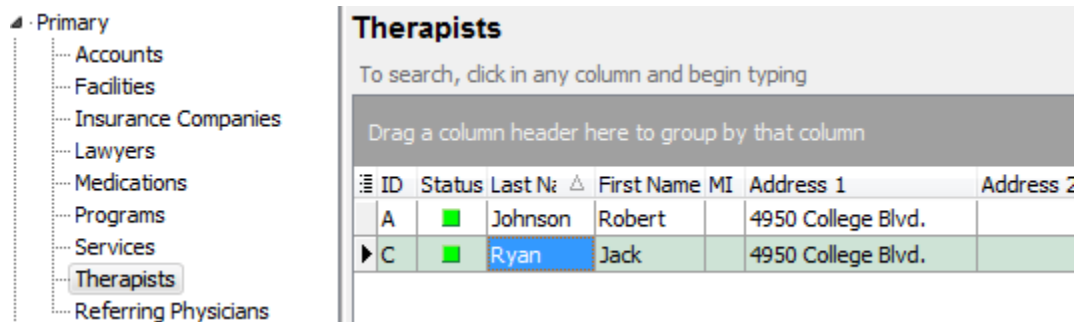
You will receive a call within 1 business day to create your account. Upon successful creation of your CardConnect account, the representative will give you a Merchant ID and API credentials (Username and Password) that you can enter into Helper as indicated below.

## Setting up the credit card for a therapist

In Helper, go to Setup/Libraries



Next, select and edit the therapist name.

A screenshot of the Helper application's 'Therapists' screen. On the left is a navigation tree with 'Therapists' selected. The main area shows a table of therapists with columns for ID, Status, Last Name, First Name, MI, Address 1, and Address 2. The therapist 'Ryan' is selected.

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

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

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="*****"/>