

## How To Set Up Your Check Scanner with PaySimple 2.0 Solution

*Software Requirements:* Microsoft Windows XP or higher and Internet Explorer 6.0 or later. This product does not work with a Macintosh.

*Important Note:* Authorizations are very important when processing ACH transactions, and it is very important that you set the ACH Payment Type for the authorization you have—this protects you by law in the event a customer disputes a transaction you initiate. The system supports two types of scanned check transactions—ARC transactions (checks you receive in the mail) and BOC transactions (checks you receive in person and process later). See the [PaySimple Transaction Authorization Guide](#) for more information on this.

### Setting up your PaySimple Check Scanner

1. Visit <http://www.paysimple.com/support/quick-guide/Release.zip> to extract the files that need to be installed on your computer.
2. Before starting the installation process close your Internet Explorer application.
3. Unzip the files in the folder provided. Click the 'Extract Files' link at the top left of the folder window. Then double-click the "PaySimple Check Scanner.msi" icon to install.
4. Plug the USB Scanner into your computer.
5. After Windows detects the check scanner, make note of the COM port that it has been assigned. You'll find this inside the device manager.
  1. Right-click on **My Computer** and choose **Properties**
  2. Click over to the **Hardware** tab
  3. Click on **Device Manager**
  4. Expand 'Ports' (COM & LPT), which appears halfway down the Device Manager tree. Find the Mini MICR (COM##). Record the number that follows 'COM' (It is a single digit number)
  5. Close the **Device Manager**
6. Log into your PaySimple Account.
7. On the main navigation bar, click **Process Payments**. Select an existing customer or add a new one.
8. Select **ACH Payment** as your transaction type
9. Select **ARC** or **BOC** as the ACH payment type
10. You'll be prompted to enter the port number (see step 5.5 above). Note that you must plug the scanner into the same USB port each time you use it. If you need to change the port to which your scanner is attached, you will need to clear your browser's cookies, close the browser, return to step 4 and repeat the instructions above.

## Using your PaySimple Check Scanner

1. Log into your PaySimple Account
2. On the main navigation bar, click **Process Payments**, select an existing customer or add a new one
3. Select **ACH Payment** as your transaction type.
4. The Scanner option is only available with ARC(mailed check) or BOC(in person check) as the ACH Type. Be sure to select the correct ACH Type so your transaction is properly authorized.
5. Select the customer account from the drop-down list for whom you are scanning a check, or click the **New Account** link if the check is for a new account not previously attached to an existing customer.
6. Click **Scan** next to the **Account Type Info** field. If a pop-up box appears warning about an unsigned Active X control, click **Yes** to continue using the Active X. PaySimple has completely tested its safety.
7. Check the top of the page giving permission to run windows scripts. This will allow the information to be entered via the check scanner
8. Scan the check. A green light will appear on the check scanner indicating the check was successfully scanned. A red light indicates it was not scanned (ensure you have the check inserted in the correct direction and try again)
9. The account, routing, and check number populate into the form pending a successful scan
10. Enter the remaining information for the sale
11. Click **Process**. You will see a pop up window with the transaction details. If there is an error, the screen will indicate what needs to be modified to process the transaction correctly

**PaySimple Support:** 800.466.0992