

CC/eCheck Tab

Last Modified on 11/07/2016 2:31 pm EST

This tab shows all the customer's Credit card and eCheck information.

Transaction Date	Submitted Date	Description	Status	Amount	Action
07/12/2016	07/12/2016	Refund for Payment #27...	D	(\$50.00)	
06/29/2016	06/29/2016	nbnbn - INVALID CREDIT ...	D	\$3,618.19	
11/30/2015	11/30/2015	pmt - TEST APPROVAL - ...	V	\$583.29	
11/16/2015	11/16/2015	pmt - TEST APPROVAL	A	\$551.25	Receipt

Transactions

The "Transactions" tab shows a list of this customer's past credit card and eCheck transactions. The status of these transactions will be color coded according to the legend.

Transaction Date	Submitted Date	Description	Status	Amount	Action
07/12/2016	07/12/2016	Refund for Payment #27...	D	(\$50.00)	
06/29/2016	06/29/2016	nbnbn - INVALID CREDIT ...	D	\$3,618.19	
11/30/2015	11/30/2015	pmt - TEST APPROVAL - ...	V	\$583.29	
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New Transaction

To add a new transaction click "+ New Transaction" on the right side of the screen. a Payment Page will appear. Fill out fields ([hyperlink to payments](#)) and click "Submit Payment" in the upper right corner to submit the transaction to Forte.

Invoices	Credits	Sites/Sys	RMR	Work Orders	Proposals	Payments	CC/eCheck	Notes	Contacts	Docs	Archive
27	4	7	20	29	4	115	89	6	7	5	0

Transactions		Credit Card	eChecks		
Approved (A) Funded (F) Voided (V) Refunded Denied (D), Rejected (R), Previously Funded (PF)					
+ New Transaction					
Transaction Date	Submitted Date	Description	Status	Amount	Action
07/12/2016	07/12/2016	Refund for Payment #27...	D	(\$50.00)	
06/29/2016	06/29/2016	nhbnu - INVALID CREDIT ...	D	\$3,618.19	
11/30/2015	11/30/2015	pmt - TEST APPROVAL - ...	V	\$583.29	
11/16/2015	11/16/2015	pmt - TEST APPROVAL	A	\$551.25	Receipt -

Receipt

Click "Receipt" to the right of approved transactions to send a receipt to the customer's email. Enter the customer's email address in the box that appears and click "Email" to send.


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Void

To void an approved transaction click the "-" icon to the right of the transaction you wish to void. This cannot be undone.


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Transaction Details

To view detailed information about a transaction by clicking the blue "Transaction Date" hyperlink on the left side of the page.

Invoices	Credits	Sites/Sys	RMR	Work Orders	Proposals	Payments	CC/eCheck	Notes	Contacts	Docs	Archive
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Transactions		Credit Card	eChecks		
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If a transaction is approved or void you can view the payment and deposit linked to the transaction by clicking the corresponding buttons on the upper right side of the page.

Transaction Details

[View Payment](#)[Customer](#)[View Deposit](#)

Transaction #: 1084

Amount: \$583.29

Payment Method: Credit Card: 0655 - Test

Email Receipt: brads@PERENNIALSOFTWAF

Transaction Date: 11/30/2015

Description: pmt - TEST APPROVAL - APPROVED

Response Code: V

Authorization: 123456

Trace Number: 2180C520-B61B-46A5-908A-8241A3E189C4

Alt Trace Number: 09A7339F-A808-4F80-87EF-7C444CD52B7D

Voided Date: 7/20/2016 12:00:00 AM

Submitted Date: 11/30/2015 10:09:17 AM

Settlement Date: 7/20/2016 12:00:00 AM

Transaction Status: Voided

Payment #: 257

Credit Card

The "Credit Card" tab shows you a list of this customer's credit cards

Invoices 27 Credits 4 Sites/Sys 7 RMR 20 Work Orders 29 Proposals 4 Payments 115 CC/eCheck 89 Notes 6 Contacts 7 Docs 5 Archive 0

Transactions **Credit Card** eChecks

Credit Cards

1. [+ New Credit Card](#)

Account Name	Card Type	Expiration Date	Last 4	Auto Recurring	
Matt Grossman - test	Visa	1/2015	1111	No	2.
Matt Grossman - Test	Visa	12/2017	0655	Yes	

1. New Credit Card

To add a new credit card, click new credit card on the right side of the page. Fill out fields (hyperlink new cc) and click "Save" in the upper right corner.

2. Edit

To edit credit card information, click the pencil icon to the right of the credit card you wish to edit.

eChecks

The "eCheck" tab shows you a list of this customer's eChecks.

2. New eCheck

To add a new eCheck, click "New eCheck" on the right side of the page. Fill out fields ([hyperlink new eCheck](#)) and click

"Save" in the upper right corner.

2. Edit

To edit eCheck information, click the pencil icon to the right of the credit card you wish to edit.

(I need better screenshots)