

EDIT CLIENT INFORMATION

- From the left hand navigation pane select the Clients tab then Search.
- Choose how you wish to search for this client using the Selection drop down box then entering the value of your selection in the Value field.
- Click Search
- Double click the first name of the client you wish to make updates to.

The screenshot shows the 'Client Search' interface. On the left, a navigation pane has 'Clients' selected (1) and 'Search' highlighted (2). The main area has a 'Merchant Name' field with '1163 DEMO' (4). Below it, a 'Selection' dropdown is open, showing options like 'Consumer Id', 'First Name', 'Last Name', 'Company Name', and 'Consumer Id' (3). The 'Value' field contains '123456'. To the right, there are 'Status' (Active), 'Schedule' (All), and 'Records' (50) dropdowns. A 'Search' button is present (5). Below the search fields is a table with columns: First Name, Last Name, Consumer ID, Merchant ID, Next Trans, Amount, Status, Schdl, Edit, Delete. The first row shows 'Minnie Mouse' with Consumer ID 123456 and Merchant ID 2163. A '6' callout points to the 'Minnie' first name. At the bottom, there are links for 'Knowledge Center', 'User Options', 'Merchant Options', and 'Gateway Settings'. The text 'MERCHANTBANKCARD' is visible at the bottom right.

First Name	Last Name	Consumer ID	Merchant ID	Next Trans	Amount	Status	Schdl	Edit	Delete
Minnie	Mouse	123456	2163	2010-06-19	75.00	●	🔄	👤	🗑️

EDIT CLIENT INFORMATION

- Click the Client tab from the top of the customer database.
- Make any updates needed such as a new email address or service address.
- Click Update a Client to save your changes.
- And That's It!

The screenshot shows the 'Update a Client' interface. On the left is a navigation menu with 'Clients' selected. The main area has tabs for 'Client', 'Payment Methods', 'All Trans', 'Scheduled Trans', and 'Single Trans'. The 'Client' tab is active, indicated by arrow 1. The form contains the following fields:

- Merchant: 2163 DEMO
- Status: Active (dropdown)
- First Name: Minnie
- Last Name: Mouse
- Company Name: (empty)
- Address: 123 Disney Land Way
- Address 2: (empty)
- Postal Code: 33444
- City: Orlando
- State: FL (dropdown)
- Phone Number: 258-954-5610
- Fax Number: (empty)
- Email Address: minnie@disney.com
- Consumer ID: 123456
- Client ID: 11406
- Allow duplicate Consumer ID:

Below this is the 'Ship To' section with similar fields. At the bottom, an 'Update a Client' button is highlighted with arrow 3. A large yellow double-headed arrow labeled '2. UPDATE' spans across the form fields.

EDIT PAYMENT INFORMATION

- From the Payment Methods tab within the customer database you can update a client payment information, add another form of payment, or delete a payment method upon your client request.

Default	CC/eCheck	Last 4	Edit	Delete	New Trans
Yes	DISC	6611			

- To update a payment method such as an expiration date click the Edit icon next to the payment method.
- Use the drop down box(s) to update the expiration date then click the Update Payment button.

Exp Date: 02 / 2013

Card #: *****6611

Cardholder: Minnie Mouse

EDIT PAYMENT INFORMATION

- To add a new payment method click either Add eCheck or Add Credit Card.
- If adding an eCheck select the Account Type from the drop down box. Enter the Routing # and Account # then click the Add Payment button.

Payment Methods

Client | Payment Methods | All Trans | Scheduled Trans | Single Trans

Mouse Minnie

Add eCheck | Add Credit Card

Default:

Acct Type:

Routing #:

Account #:

Add Payment Cancel

Default	CC/eCheck	Last 4	Edit	Delete	New Trans
Yes	DISC	6611			

* Default Payment Method is used for the sale page and has no effect on scheduled transactions.

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- If adding a credit card select the card type and expiration date from the drop down boxes provided then enter the Card # and Cardholders First and Last name then click Add Payment.

Payment Methods

Client | Payment Methods | All Trans | Scheduled Trans | Single Trans

Mouse Minnie

Add eCheck | Add Credit Card

Default:

Procurement:

Type:

Exp Date: /

Card #:

Cardholder:

Add Payment Cancel

Default	CC/eCheck	Last 4	Edit	Delete	New Trans
Yes	DISC	6611			
No	Checking	0001			

* Default Payment Method is used for the sale page and has no effect on scheduled transactions.

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EDIT PAYMENT INFORMATION

- To make the new payment method the default payment method click the Default check box before Adding the Payment method.

Payment Methods

Client | Payment Methods | All Trans | Scheduled Trans | Single Trans

Mouse Minnie

Add eCheck | Add Credit Card

Default: **1**

Procurement:

Type: MAST

Exp Date: 04 / 2012

Card #: 5431111111111111

Cardholder: Minnie Mouse

Add Payment Cancel

* Default Payment Method is used for the sale page and has no effect on scheduled transactions.

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- While you can have as many payment methods as your client wishes, only one can be the default payment method. It is the default payment method that will be automatically populated when using the Client Quick Search on the sale page.

Payment Methods

Client | Payment Methods | All Trans | Scheduled Trans | Single Trans

✓ Payment method added successfully.

Mouse Minnie

Add eCheck | Add Credit Card

Default	CC/eCheck	Last 4	Edit	Delete	New Trans
Yes	DISC	6611			
No	Checking	0001			
No	MAST	1111			

* Default Payment Method is used for the sale page and has no effect on scheduled transactions.

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EDIT PAYMENT INFORMATION

- Be sure when changing the payment method that should be the default payment method that you update the payment method on any previously scheduled transactions.
- From the Scheduled Trans tab within the customer database click the edit clock icon.
- Use the Payment Method drop down list to select the payment method that should be used for these scheduled transactions.
- Click the save changes icon.
- And That's It!

Schedule Listings

Client Payment Methods **1** Scheduled Trans Single Trans

Mouse Minnie

Schedule Definitions

Edit Schedule Definition 04/19/2010

Frequency: Bi-Month Payment Method: DISC 6611 **3**

Status: Active

Consumer ID: 123456

Invoice #

Branch #

Creator: Demo

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Date	Consumer ID	Invoice #	Branch #	Frequency	Creator	Status
+ 04/19/2010	123456			Bi-Monthly	Demo	Active 2

Click on the plus (+) to view schedule items

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