

USING MULTIPLE PAYMENT FUNCTIONS

- To add a transaction for a client with multiple payment methods go to the Clients tab from the left hand navigation pane then click Search.
- Use the Selection drop down box to pick the criteria you wish to search for this client by.
- Enter a value for your search criteria
- Click Search
- Then click the first name of the client you wish to run a transaction for.

The screenshot displays the 'Client Search' interface. The left navigation pane is active on the 'Clients' tab, showing options for Add, Search, Export, and Import. The main content area shows the search form with the following details:

- Merchant Name: 2163 DEMO
- Selection: Consumer Id (dropdown menu open showing options: First Name, Last Name, Company Name, Consumer Id)
- Value: 100234
- Status: Active
- Schedule: All
- Records: 50

A 'Search' button is located below the search criteria. Below the search form is a table with the following data:

First Name	Last Name	Consumer ID	Merchant ID	Next Trans	Amount	Status	Schdl	Edit	Delete
Sam	Smith	100234	2163	2010-05-17	125.00	●	🔄	👤	🗑️

The table footer indicates 'MERCHANTBANKCARD'.

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- Select the Payment Methods tab from the top of the customer database.
- A list of the available payment methods for this client will be shown to the right.
- Click the New Trans icon next to the payment method you run a transaction with.

Payment Methods

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

Smith Sam

[Add eCheck](#) | [Add Credit Card](#)

Default	CC/eCheck	Last 4	Edit	Delete	New Trans
Yes	Checking	7664			
No	MAST	4444			
No	DISC	6611			
No	VISA	9260			
No	AMER	1111			

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

MERCHANTBANKCARD

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- The clients Payment and Bill To information will be automatically populated on to the sale page of your Virtual Terminal.
- Simply add the sub total, then tax separately if appropriate in your office. The total will automatically populate.
- Enter an Invoice number in the Order info section if your office uses this to reconcile or reference with.
- Then click Add Transaction

The screenshot displays a payment processing interface with the following sections:

- Transactions** (top left menu)
- Reporting** (top left menu)
- Clients** (top left menu)
- Client Quick Search** (right side panel) with fields for First Name, Last Name, Company Name, and Consumer ID, and a Search button.
- Payment Info** (main form):
 - Merchant: 2163 DEMO
 - Radio buttons for Credit Card Trans (selected) and eCheck Trans
 - Trans Type: Sale (dropdown), Swipe button
 - Card #: *****1111 *
 - Cardholder: Sam Smith *
 - Exp Date: 03 / 2012
 - Card Type: American Express (dropdown)
 - Account Code: (text field), Proc Card checkbox
 - Sub total: 0.00 *
 - Sales tax: 0.00, Tax Exempt checkbox
 - Total: 0.00
- Order Info** (collapseable section):
 - Invoice #: (text field)
- Schedule Info** (collapseable section)
- Bill to Info** (collapseable section)
- Comments** (collapseable section)
- * = Required Field (note)
- Add Transaction button
- MERCHANTBANKCARD (bottom right)

Bottom left navigation menu:

- Knowledge Center
- User Options
- Merchant Options
- Gateway Settings

USING MULTIPLE PAYMENT FUNCTIONS


- You will receive an instant response as to whether this transaction was approved or declined.
- And That's It!

Transactions

Reporting

Clients

 [Add](#)

 [Search](#)

 [Export](#)

 [Import](#)

Knowledge Center

User Options

Merchant Options

Gateway Settings

Transaction Response

 [Authorization Form](#)

Response Description : **TEST APPROVAL**

Date Time : 4/19/2010 6:48:58 AM PDT

Merchant ID: 2163

Transaction Type: CC Sale

Total Amount \$: 75.00

Name: Sam Smith

Response Type: A APPROVED

Response Code: APPROVED A01

Authorization Code: 123456

Last 4 digits of CC#: 1111


Exp Date: 03/2012

Entered by: Demo

Trace Number: 2F78E9FD-EDD1-4782-A910-688904ADE1B5


AVS Results

 AVS Postal Code: Not Checked or No Issuer Response

 AVS Street: Not Checked or No Issuer Response

Verification Results

None

 [Add another transaction for this merchant](#)

MERCHANTBANKCARD