

CC/eCheck Tab

Last Modified on 04/29/2022 10:22 am EDT

The CC/eCheck tab is comprised of three tabs: Transactions, Credit Card, and eChecks.

Transactions Tab

The Transactions tab will display all credit card and echeck transactions for the customer.

New Transaction Button

Clicking on the New Transaction button will open a form for entering a new credit card or echeck transaction for the customer.

Receipt Button

Clicking the Receipt button will open a dialog box where the user may enter an email address to email a receipt for the payment to the customer. There is an option on this dialog box to print the receipt. Selecting the print option will create a .pdf file of the customer receipt. Users can open the file and send the document to a local printer.

Void Button

If a transaction has not yet been submitted for funding (Submitted Date column is blank), clicking on the Void button will stop the transaction from being submitted.

Transaction Hyperlink

In the Transaction Date column, clicking on the hyperlink of a Transaction will open the record for viewing.

Emily Wood
Customer #3719 Active Normal Residential-Owner • Since 3/4/22

Edit Tasks History

Total Balance Due **\$ 822.71** Total RMR **\$ 120.00**

Customer Aging

— Current — 1-30 Days — 31-60 Days — 61-90 Days — 91+

Address 45722 Chandler
Plymouth, MI 48170

Phone (734) 258-4646

Cell (734) 258-3311

Email emilylwood@gmail.com

Salesperson Dan Brown

Last Statement

Default Term

Delivery Method Print

Delivery RMR Inv YES

Comments

Invoices 7 **Credits** 2 **Sites/Systems** 2/3 **RMR** 5 **Work Orders** 2 **Proposals** 0 **Payments** 8 **CC/eCheck** **Notes** 0 **Contacts** 2 **Documents** **Archive** **Custom Fields** **eForms** **Emails**

Transactions **Credit Card** **eChecks**

+ New Transaction

Transaction Date	Submitted Date	Description	Funding Type	Amount	
Jan 1, 2018		Recurring Invoice: 20448	Voided	\$4813	<a>Receipt <a>Void
Feb 1, 2018		Recurring Invoice: 20450	Voided	\$53.28	<a>Receipt <a>Void
Mar 1, 2018		Recurring Invoice: 20453	Voided	\$21.31	<a>Receipt <a>Void
Sep 27, 2021	Sep 27, 2021, 2:43:22 PM		Denied	\$2313	<a>Receipt <a>Void

1 - 4 of 4 items Refresh

Credit Card Tab

The Credit Card tab will display all credit cards on file for the customer.

Add Credit Card Button

Clicking on the Add Credit Card button will open a form for entering a new credit card for the customer.

Edit Button

Clicking on the Edit button will open the credit card information form. The only information that may not be changed is the credit card number, which is not displayed for security purposes.

Delete Button

Clicking on the Delete button will permanently delete the credit card.

Emily Wood
Customer #3719 Active Normal Residential-Owner • Since 3/4/22

Total Balance Due \$822.71 **Total RMR** \$120.00

Customer Aging

Category	Amount
Current	~1600
1-30 Days	~1200
31-60 Days	~800
61-90 Days	~400
91+	~200

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Last Statement
Default Term
Delivery Method Print
Delivery RMR Inv YES

Comments

Navigation: Invoices (7), Credits (2), Sites/Systems (2/3), RMR (5), Work Orders (2), Proposals (0), Payments (8), **CC/eCheck**, Notes (0), Contacts (2), Documents, Archive, Custom Fields, eForms, Emails

Transactions | **Credit Card** | eChecks

+ Add Credit Card

Account Name	Card Type	Expiration Date	Last 4	Auto Recurring	
Emily Wood	Visa	1/2020	1111	<input type="checkbox"/> NO	Edit Delete

1 - 1 of 1 items [Refresh](#)

eChecks Tab

The eChecks tab will display all eCheck bank accounts on file for the customer.

Add eCheck Button

Clicking on the Add eCheck button will open a form for entering a new eCheck bank for the customer.

Edit Button

Clicking on the Edit button will open the eCheck information form. The only information that may not be changed is the bank account number and routing number, which are not displayed for security purposes.

Delete Button

Clicking on the Delete button will permanently delete the eCheck bank.



Emily Wood

Customer #3719 Active Normal Residential-Owner • Since 3/4/22

Edit

Tasks

History

Total Balance Due **\$ 822.71**
Total RMR **\$ 120.00**



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Plymouth, MI 48170
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Salesperson Dan Brown
Last Statement
Default Term
Delivery Method Print
Delivery RMR Inv

Comments

Invoices 7	Credits 2	Sites/Systems 2/3	RMR 5	Work Orders 2	Proposals 0	Payments 8	CC/eCheck	Notes 0	Contacts 2	Documents	Archive	Custom Fields	eForms	Emails
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Transactions

Credit Card

eChecks

+ Add eCheck

Account Name	Bank Name	Last 4	Auto Recurring	
Emily Wood	Chase	1234	<input checked="" type="checkbox"/>	<p>Edit Delete</p>

1

1 - 1 of 1 items

Refresh