

Add a Credit Card/eCheck Transaction

Last Modified on 12/20/2024 1:51 pm EST

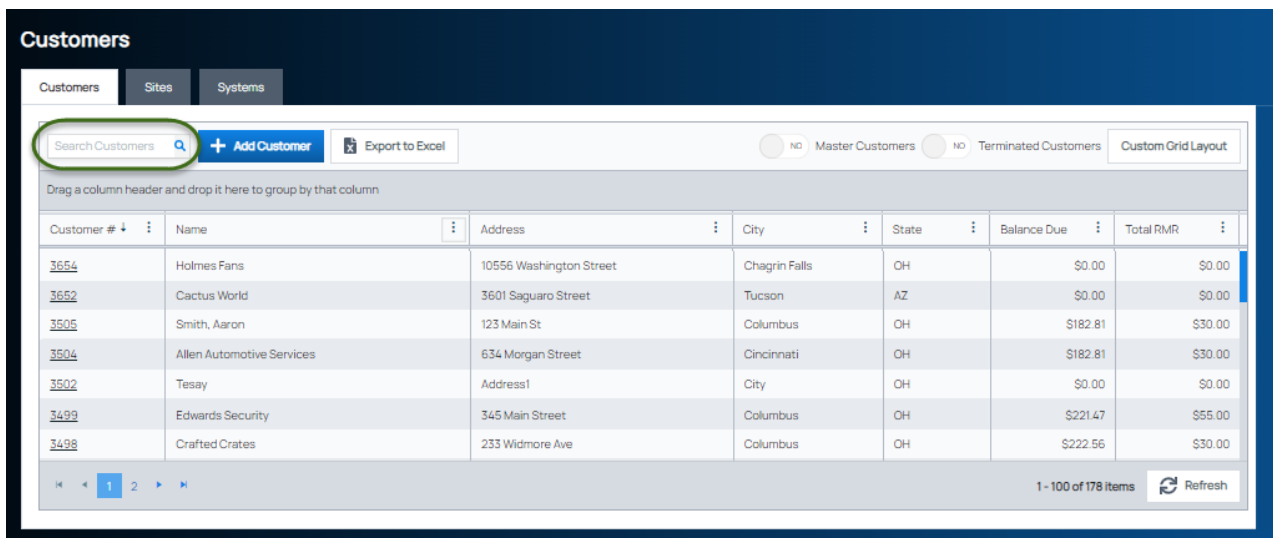
Manual EFT transactions can be submitted to pay an invoice or a non-invoice related purpose, such as a deposit for a work order.

Add an EFT for an Invoice

To add an EFT for an invoice, access the customer record.

From the main menu, arrive at the Customers list with this path: CRM > Customers.

The Customers opens. Locate the customer in the list, and then click the hyperlink in the Customer # column to open the customer record.



The screenshot shows the 'Customers' list interface. At the top, there are tabs for 'Customers', 'Sites', and 'Systems'. Below the tabs is a search bar labeled 'Search Customers' with a magnifying glass icon, a blue '+ Add Customer' button, and an 'Export to Excel' button. To the right of the search bar are two toggle switches for 'Master Customers' and 'Terminated Customers', and a 'Custom Grid Layout' button. Below this is a grid of customer records. The grid has columns for Customer #, Name, Address, City, State, Balance Due, and Total RMR. The first row is highlighted in blue. At the bottom of the grid, there is a pagination bar showing '1' of 2 pages and a 'Refresh' button.

Customer #	Name	Address	City	State	Balance Due	Total RMR
3654	Holmes Fans	10556 Washington Street	Chagrin Falls	OH	\$0.00	\$0.00
3652	Cactus World	3601 Saguaro Street	Tucson	AZ	\$0.00	\$0.00
3505	Smith, Aaron	123 Main St	Columbus	OH	\$182.81	\$30.00
3504	Allen Automotive Services	634 Morgan Street	Cincinnati	OH	\$182.81	\$30.00
3502	Tesay	Address1	City	OH	\$0.00	\$0.00
3499	Edwards Security	345 Main Street	Columbus	OH	\$221.47	\$55.00
3498	Crafted Crates	233 Widmore Ave	Columbus	OH	\$222.56	\$30.00

The Customer record opens. Click the Invoices tab. A list of all invoices for the customer is shown in the grid area. Locate the invoice you want to pay, and then click the **Pay Invoice** button.

If the customer has a credit card or eCheck bank on file, you are prompted to select the payment method. Fill in the form, and then save.

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

Edit Tasks History

Total Balance Due Total RMR
\$0.00 **\$0.00**

Customer Aging

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

Comments

Invoices 0 Credits 0 Sites/Systems 1/0 RMR 0 Work Orders 0 Proposals 0 Payments 0 CC/eCheck 0 Notes 0 Contacts 0 Documents Archive Custom Fields eForms Emails

New Invoice Generate Statement Show all invoices

Invoice #	Invoice Date	Due Date	PO Number	Total Amount	Amount Due	
21461	Mar 25, 2022	Mar 25, 2022		\$125.00	\$0.00	\$ Pay Invoice
21462	Mar 25, 2022	Mar 25, 2022		\$33.00	\$0.00	\$ Pay Invoice
21463	Mar 25, 2022	Mar 25, 2022		\$250.00	\$20.80	\$ Pay Invoice
21467	Mar 25, 2022	Mar 25, 2022		\$33.05	\$33.05	\$ Pay Invoice

1 - 1 of 1 items Refresh

Add an EFT for Unapplied Cash

To add an EFT to apply to unapplied cash, access the customer record.

From the main menu, arrive at the Customers list with this path: CRM > Customers.

The Customers list opens. Locate the customer in the list, and then click the hyperlink in the Customer # column to open the customer record.

Customers

Customers Sites Systems

+ Add Customer Export to Excel Master Customers Terminated Customers Custom Grid Layout

Drag a column header and drop it here to group by that column

Customer #	Name	Address	City	State	Balance Due	Total RMR
3654	Holmes Fans	10556 Washington Street	Chagrin Falls	OH	\$0.00	\$0.00
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1 - 100 of 178 items Refresh

The Customer record opens. Click the CC/eCheck tab, and then click the **New Transaction** button.



Emily Wood

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

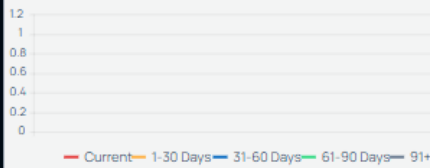
Edit

Tasks

History

Total Balance Due Total RMR
\$0.00 **\$0.00**

Customer Aging



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

Comments

- Invoices 0
- Credits 0
- Sites/Systems 1/0
- RMR 0
- Work Orders 0
- Proposals 0
- Payments 0
- CC/eCheck**
- Notes 0
- Contacts 0
- Documents
- Archive
- Custom Fields
- eForms
- Emails

Transactions Credit Card eChecks

+ New Transaction

Transaction Date	Submitted Date	Description	Funding Type	Amount	
Sep 27, 2021	Sep 27, 2021, 2:41:19 PM		Denied	\$286.25	Receipt Void
May 18, 2021				\$6,373.83	Receipt Void
Nov 19, 2020	Nov 19, 2020, 6:53:42 PM		Denied	\$101.23	Receipt Void
Nov 19, 2020	Nov 19, 2020, 6:55:27 PM		Denied	\$101.23	Receipt Void

1

1 - 7 of 7 items Refresh