Add a Credit Card/eCheck Transaction

Last Modified on 04/29/2022 10:36 am EDT

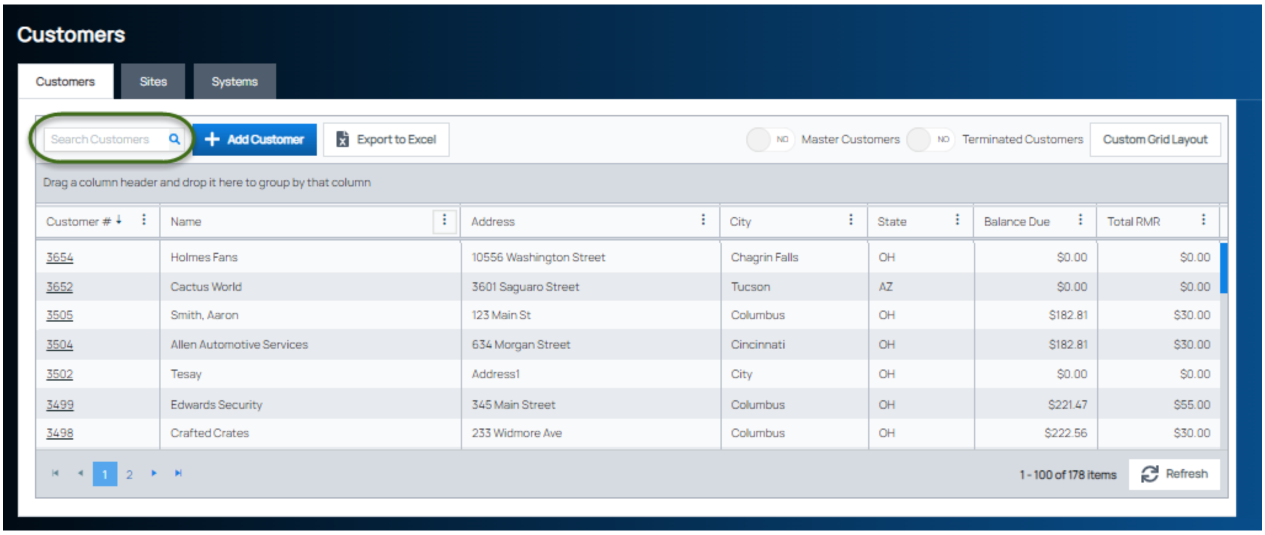
Manual EFT transactions may be submitted to pay an invoice or a non-invoice related purpose, such as a deposit for a work order.

Add an EFT for an Invoice

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

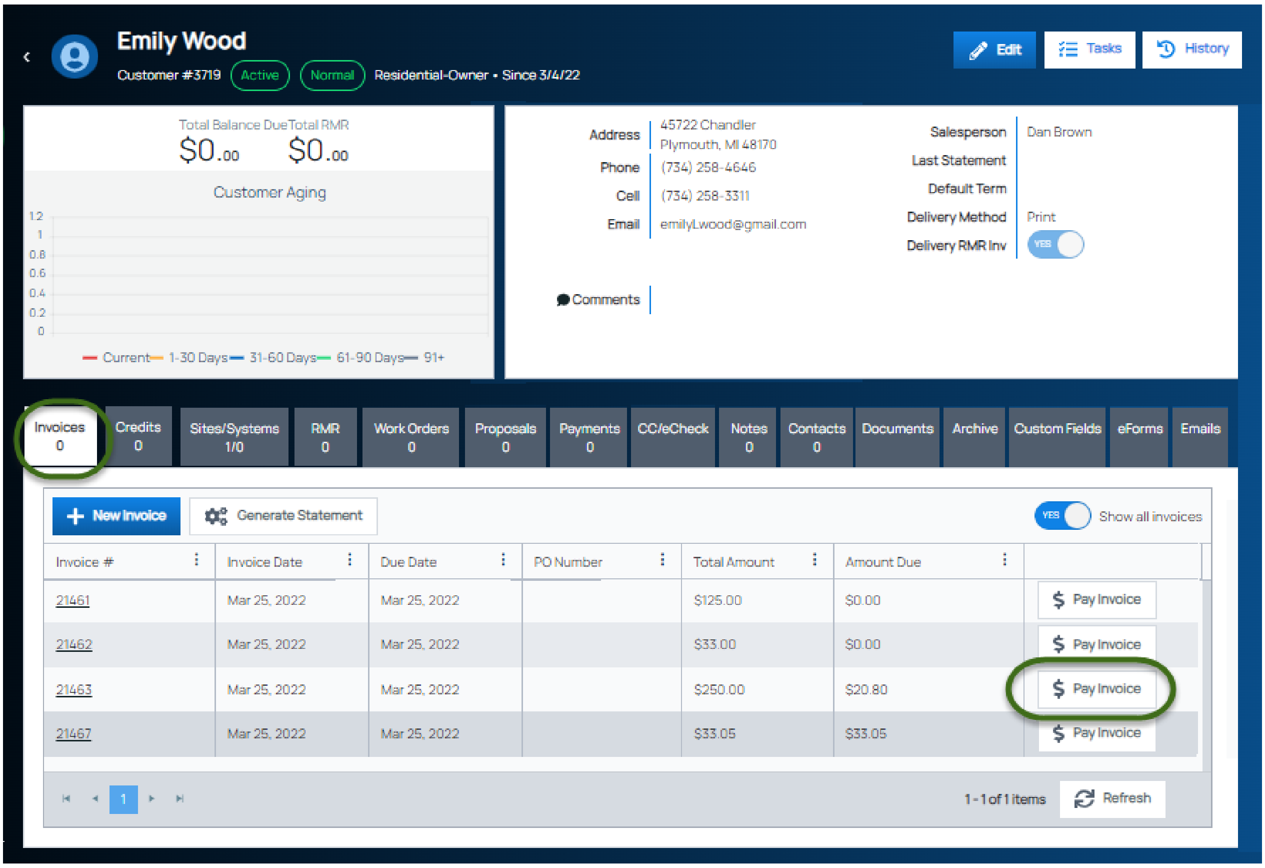
From the main menu, arrive at the Customers list with this path: Accounts Receivable> Customers.

The Customers list will be displayed. Locate the customer in the list, and then click on the hyperlink in the Customer # column to open the customer record.



The Customer record will be displayed. Click on the Invoices tab. A list of all invoices for the customer will be 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 will be prompted to select the payment method. Fill in the form, and then save.

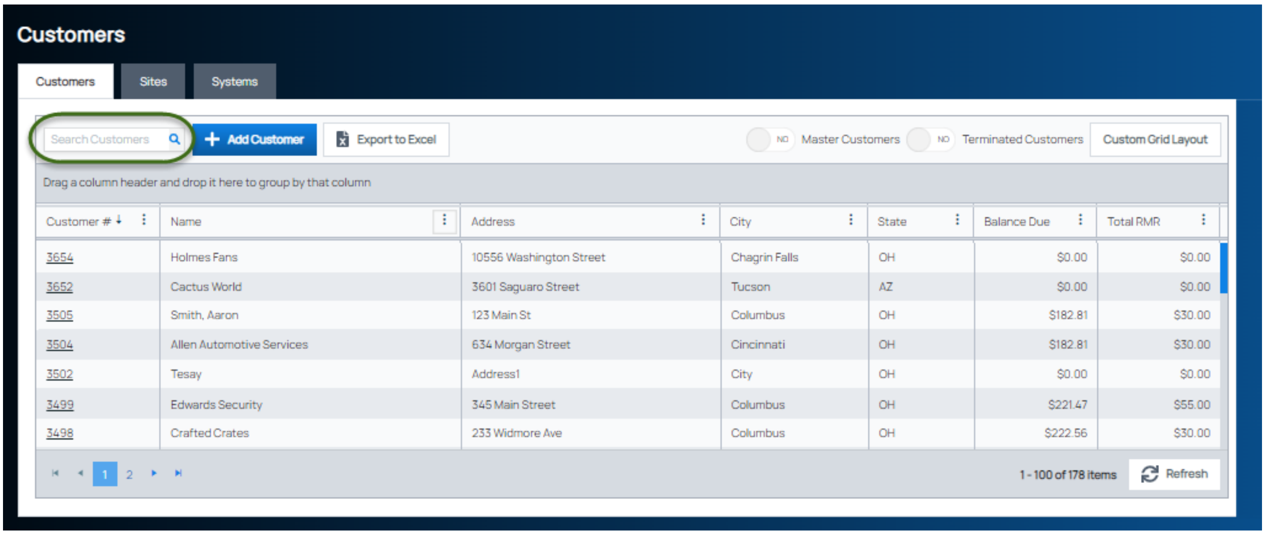


Add an EFT for Unapplied Cash

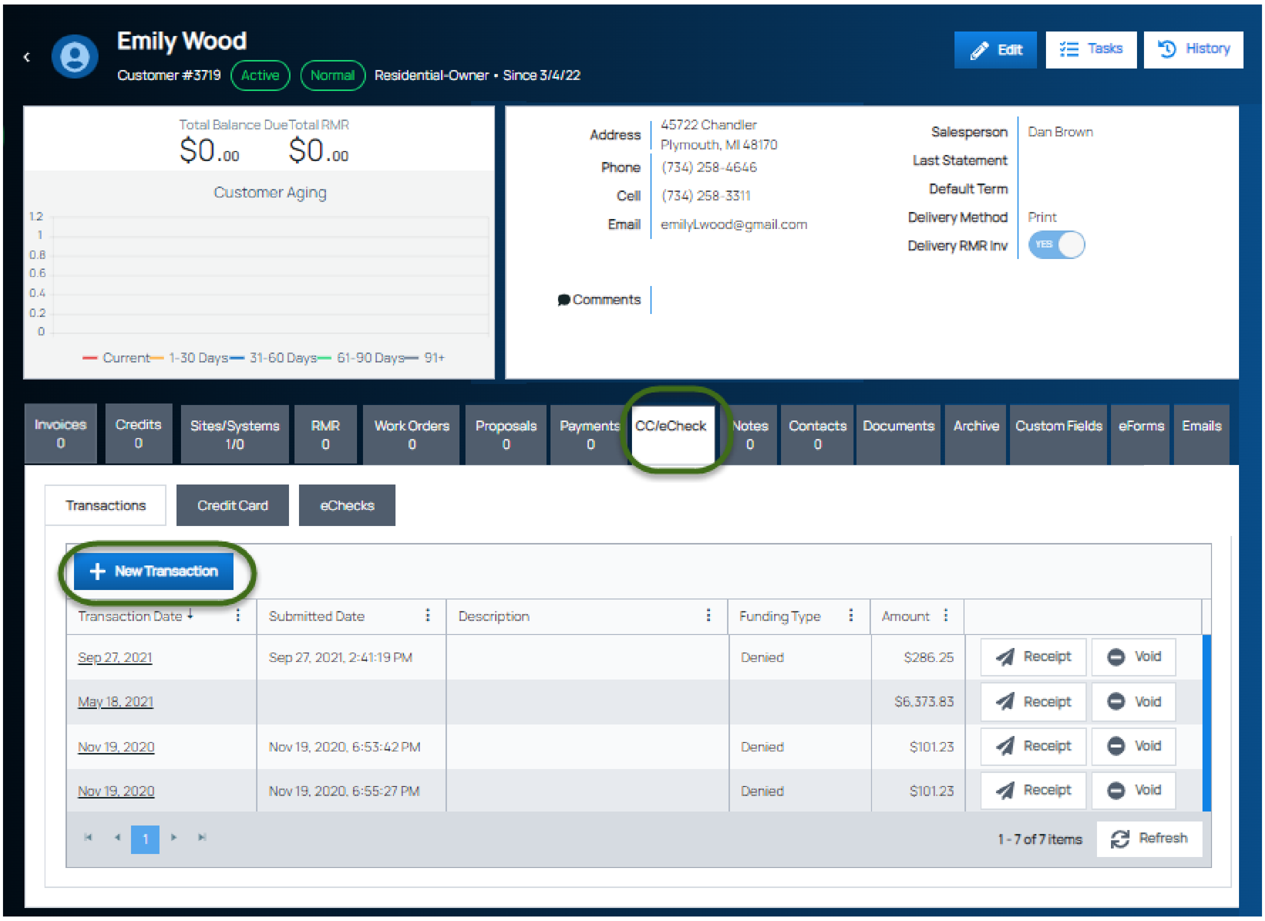
To add an EFT to apply to unapplied cash, you must access the customer record.

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

The Customers list will be displayed. Locate the customer in the list, and then click on the hyperlink in the Customer # column to open the customer record.



The Customer record will be displayed. Click on the CC/eCheck tab, and then click on 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
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
Comments
Salesperson
Dan Brown
Last Statement
Default Term
Delivery Method
Print
Delivery RMR Inv
YES
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
Nov 19, 2020
Nov 19, 2020, 6:53:42 PM
Denied
$101.23
Nov 19, 2020
Nov 19, 2020, 6:55:27 PM
Denied
$101.23
1 - 7 of 7 items
Refresh