

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. On the left is a navigation pane with 'Clients' selected, containing icons for Add, Search, Export, and Import. The main area shows a search form with the following fields:

- 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 form. Below the search form is a table of results:

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 text 'MERCHANTBANKCARD' is visible at the bottom right of the interface.

USING MULTIPLE PAYMENT FUNCTIONS

- 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

USING MULTIPLE PAYMENT FUNCTIONS

- 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 software interface for processing payments. On the left is a navigation menu with options: Transactions, Reporting, Clients, Add, Search, Export, and Import. Below this are Knowledge Center, User Options, Merchant Options, and Gateway Settings. The main area is titled 'Payment Info' and includes a Merchant dropdown set to '2163 DEMO'. There are radio buttons for 'Credit Card Trans' (selected) and 'eCheck Trans'. The 'Trans Type' is set to 'Sale', with a 'Swipe' button. Fields include Card # (masked with asterisks), Cardholder (Sam Smith), Exp Date (03 / 2012), Card Type (American Express), and Account Code. A 'Proc Card' checkbox is present. Transaction amounts are shown: Sub total (0.00), Sales tax (0.00), and Total (0.00). A 'Tax Exempt' checkbox is also visible. Below the 'Payment Info' section is the 'Order Info' section with an 'Invoice #' field. Further down are expandable sections for 'Schedule Info', 'Bill to Info', and 'Comments'. A legend indicates '* = Required Field'. An 'Add Transaction' button is at the bottom of the main form. To the right is a 'Client Quick Search' panel with input fields for First Name, Last Name, Company Name, and Consumer ID, and a 'Search' button. The text 'MERCHANTBANKCARD' is visible at the bottom right of the interface.

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