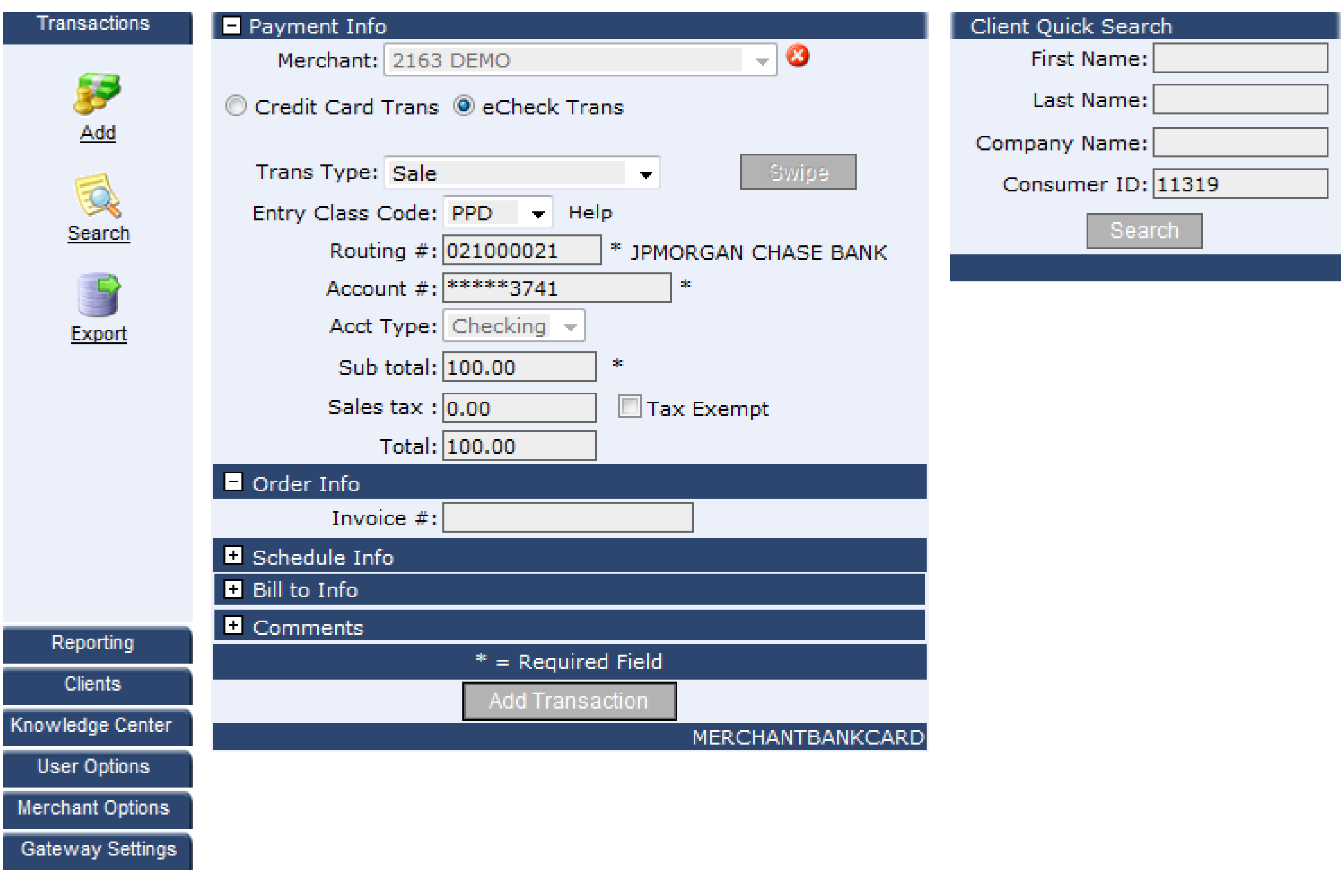
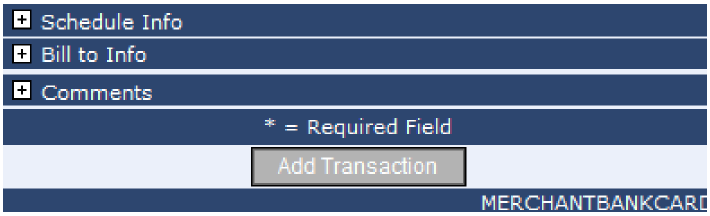
SCHEDULE A TRANSACTION

- From the left hand navigation pane select Transactions then Add.
- Option A. Enter a new clients payment information
- Option B. Use the Client Quick Search to lookup an existing client. *(See Add/Search Transaction video or PDF)*
- Enter a subtotal, then tax separately if appropriate in your office.

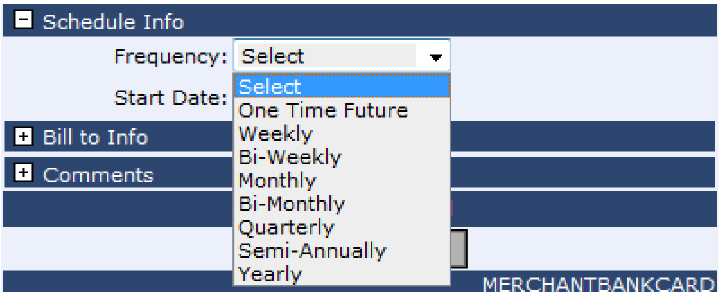


SCHEDULE A TRANSACTION

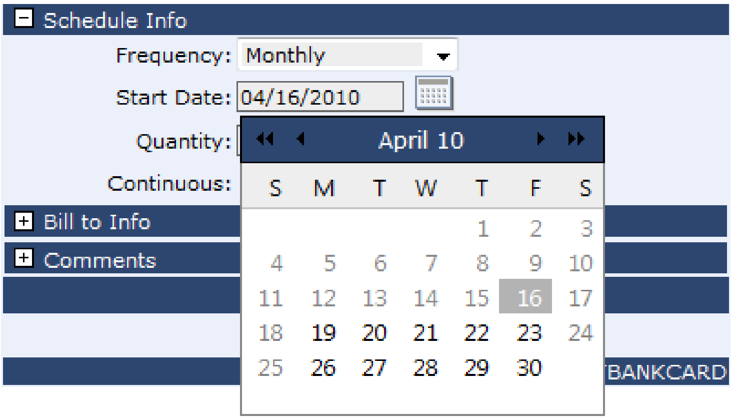
- Expand the Schedule Info section by clicking on the white plus box next to Schedule Info tab.



- Select a Frequency from the drop down box.

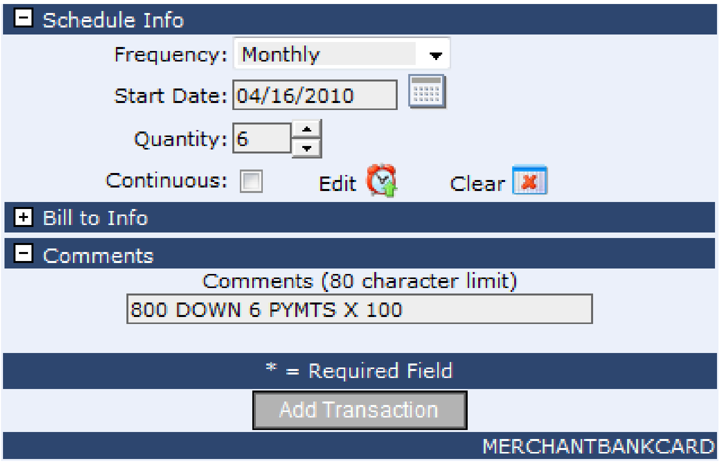


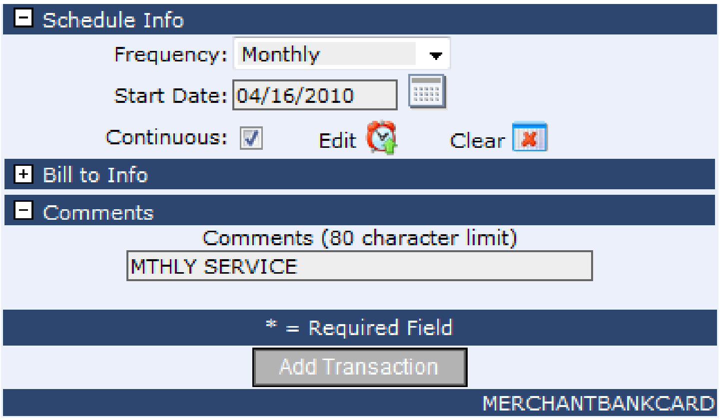
- Select a start date by clicking on the calendar icon then selecting a day.



SCHEDULE A TRANSACTION

- Option A. enter a quantity of payments you wish to set to recurring as per your contact with your client.
- Option B. click the Continuous check box. Transactions set to Continuous will have to manually have to be manually turned off from the client record.
- You may want to enter a note in the comment section. You may do so by selecting the white plus box next to comments to expand the comment field.
- When complete click Add Transaction.

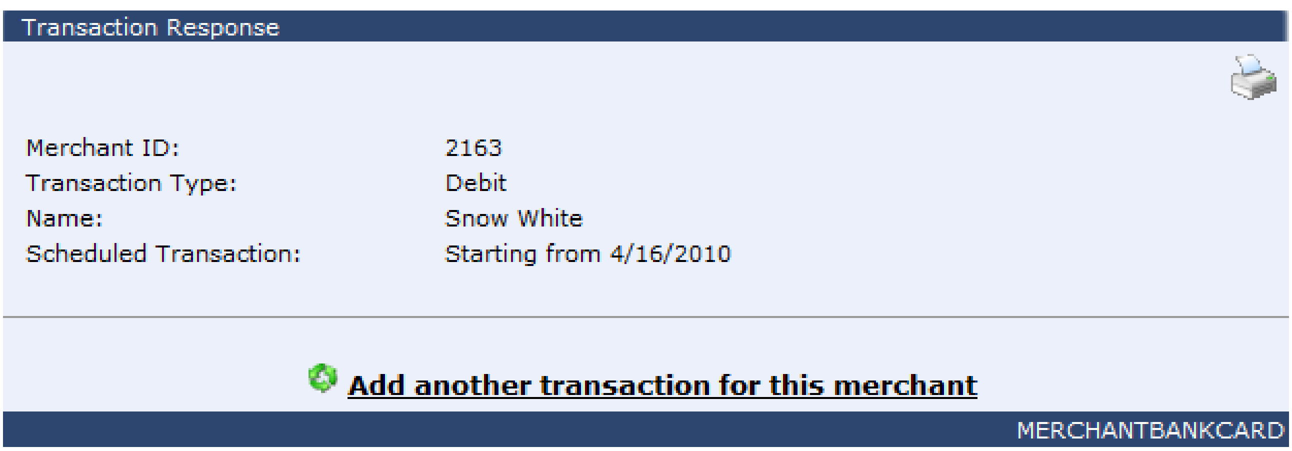




SCHEDULE A TRANSACTION

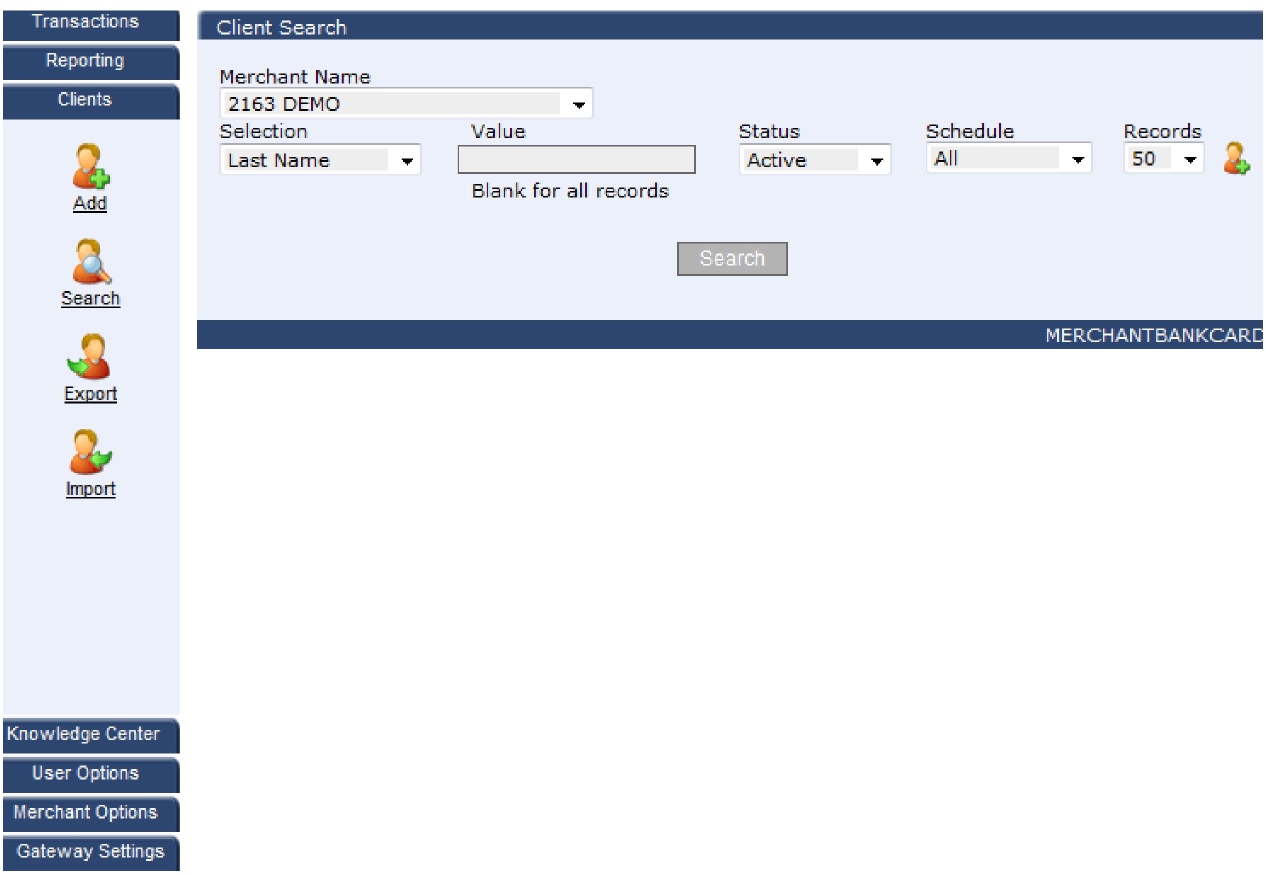
- You will receive an instant response as to whether the transaction was scheduled properly.
- If you scheduled the transaction o start today it will batch at the end of the day so you will not get an instant approval.

- And That's It!



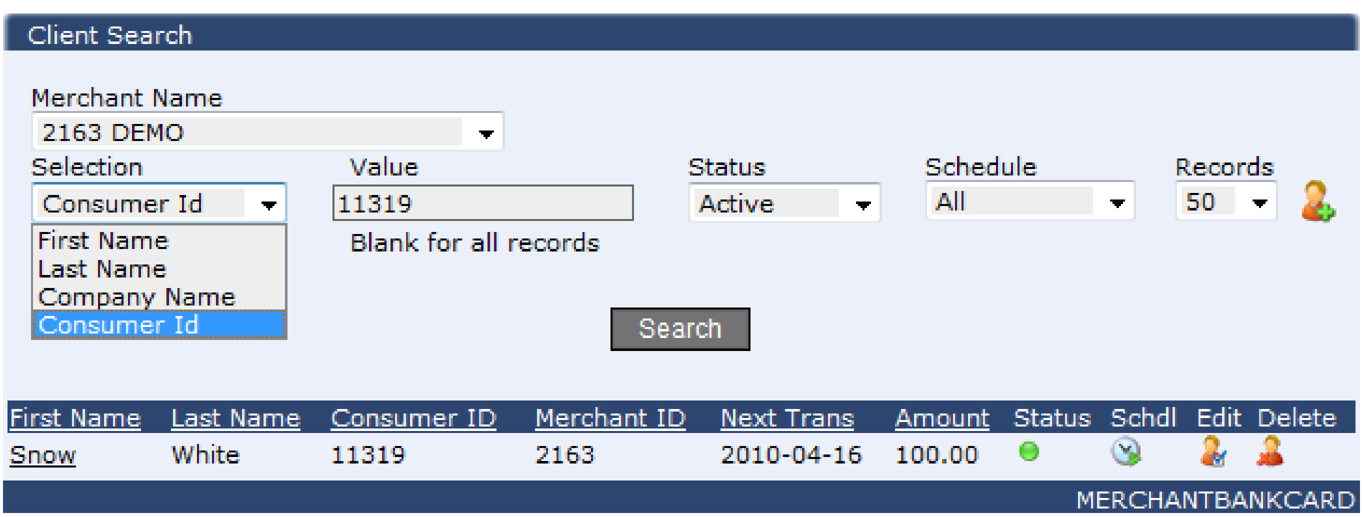
EDIT A SCHEDULED TRANSACTION

- To edit a scheduled transaction. Select the Clients tab from the navigation pane on the left then Search.



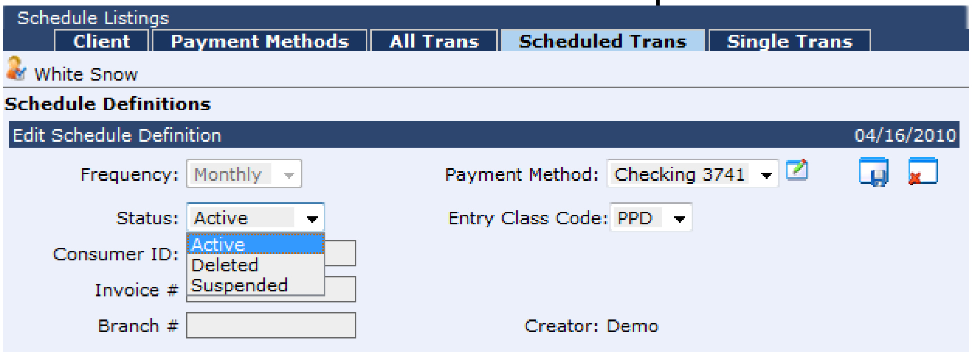
EDIT A SCHEDULED TRANSACTION

- Choose the criteria you want to search for this client from the Selection drop down list.
- Enter the value of your selection in the Value field.
- Then click Search
- Click the clock icon next to the name of the client you wish to make edits to.

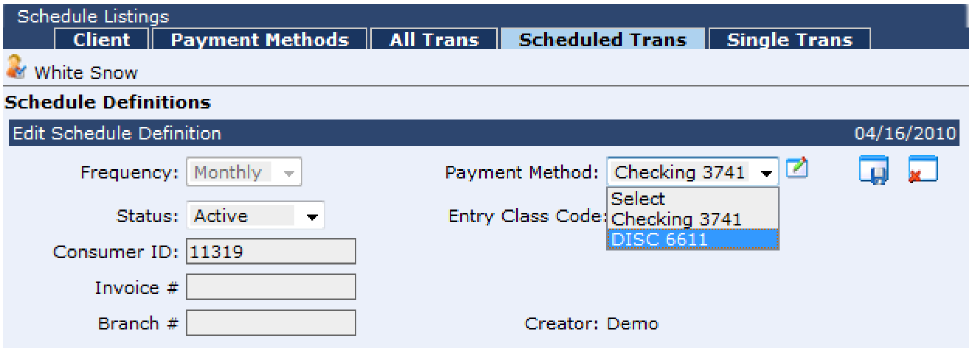


EDIT A SCHEDULED TRANSACTION

- To change the status of the scheduled transaction. Click the edit clock icon next to the scheduled transaction.
- You may change the status to suspended, deleted, or change from suspended to active by selecting one of the available choices from the status drop down box.



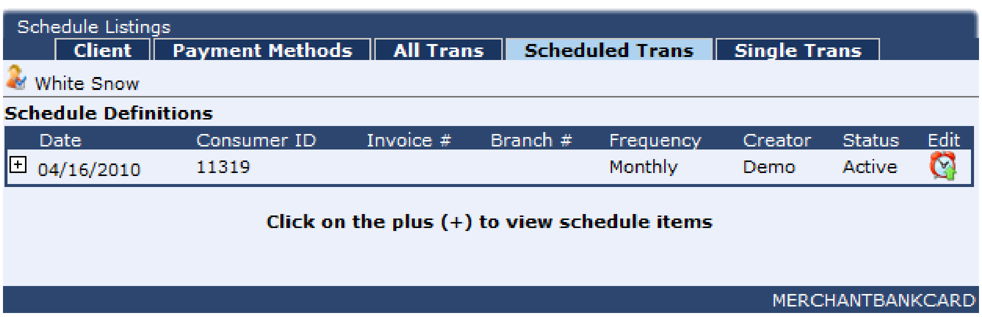
- You can also change the payment method from here. Simply choose from the clients available payment methods in the payment method drop down box.
  - **Note changing the default payment method from the payment methods tab will not change the payment method in any scheduled transaction.*



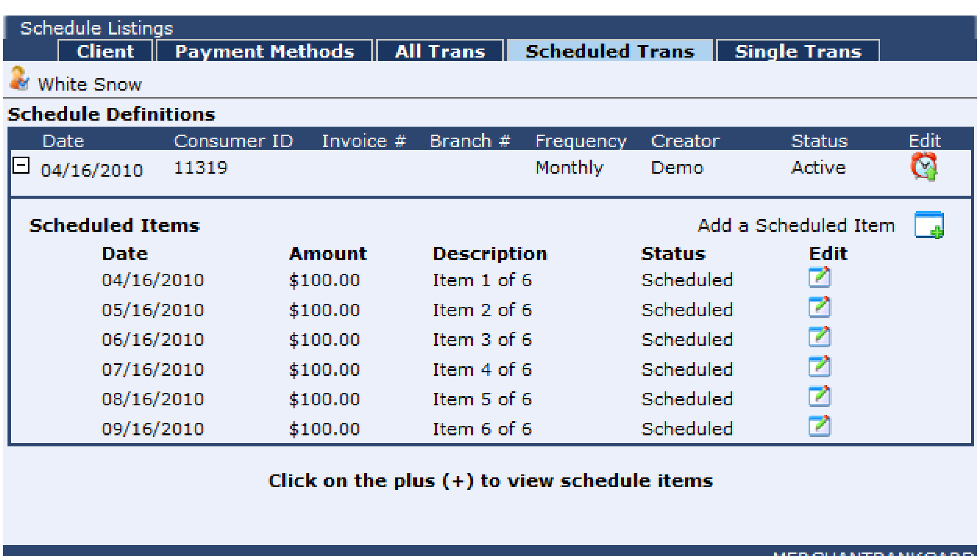
- Be sure to save any changes you made by clicking the save icon.

EDIT A SCHEDULED TRANSACTION

- To edit only one specific payment in the scheduled transaction. Click the white plus box next to the date to expand the scheduled transaction to show the details.

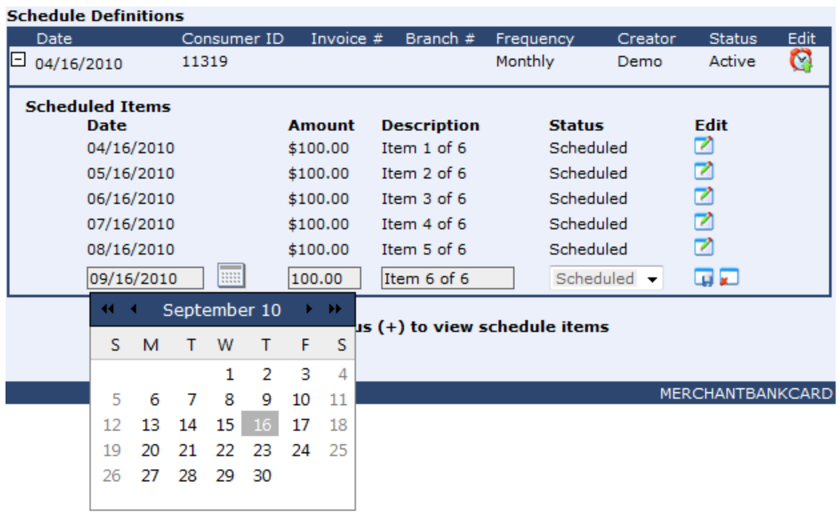


- Click the edit icon next to the transaction you wish to make changes to.

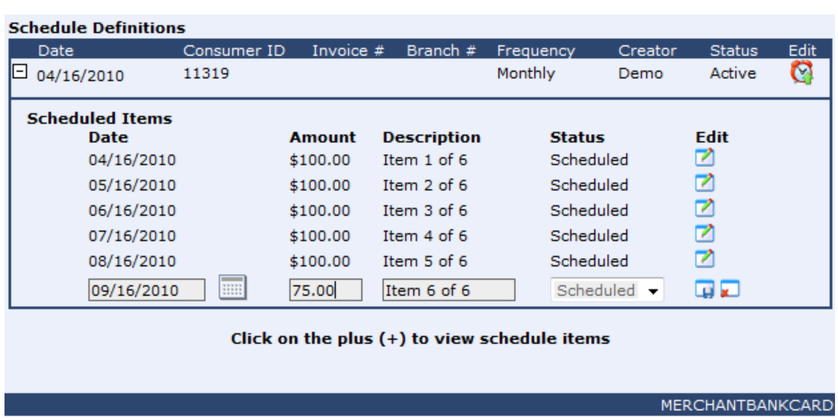


EDIT A SCHEDULED TRANSACTION

- To edit the date click the calendar icon, then choose a date you wish to schedule this specific transaction to run on.



- To edit the amount simply type in the amount you wish to collect into the Amount section for this specific transaction.



- Be sure to click the save icon to save any changes you have made.