

How to Use Automatic Credit Card Payments



Introduction

Customer credit cards can be stored safely, securely and with PCI compliance to be used when the Automatic Credit Card program is run. This makes it possible to automatically pay the customer's open invoices and/or cylinder rental invoices.

When the program is run, it will do the following:

- Charge the customer's credit card on file
- Email the customer the credit card receipt
- Save a copy of the credit card receipt
- Print a list of any declines
- Make the cash receipts entry that will be updated

Note: the credit card interface must be setup prior to use.

The Payment Alias Token file is set to use the Automatic payment feature.

Payment Alias Tokens

Account # 100 DATAWELD WELDING SUPPLY

Alias DATAWELD VISA 1234

Get Credit Card Token Address 1909 CITIZENS BANK

Get Bank Account Token Zip 71111

Delete Token Token *****

Account Type Amex

Last 4 of Account# 1089

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Updated

If an option is disabled below, this indicates the Account has the option turned on for another Payment Alias.

Use as Default for Cash Receipts Payments

Use for Automatic Daily Invoice Payments

Use for Automatic Cylinder Invoice Payments

Use as Default for Order Entry Payments

OK Cancel

The contact file is used to store the email address for credit card receipts.

Multiple contacts can be set to receive the credit card receipts.

Customer Contacts

Account # 100 DATAWELD WELDING SUPPLY 1909 CITIZENS BANK DRIVE BOSSIER CITY, LA, 71111

Contact Name DEBBI

Title

Phone Number Ext

Fax Number

Cell Number

Other Number Type Number Ext

Other Number Type Number Ext

Email Address debbi@dataweld.com

Drivers License

Date Created

Date Last Changed

Notes

Online Ordering

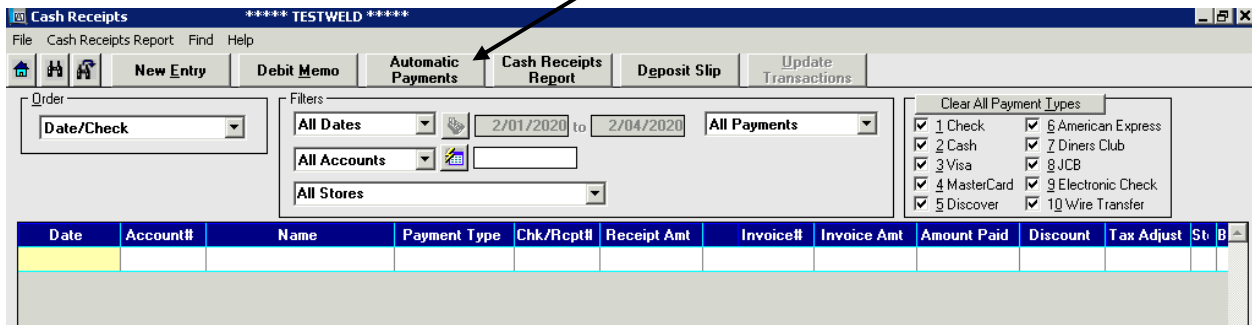
Export to Online Ordering

Contact Receives

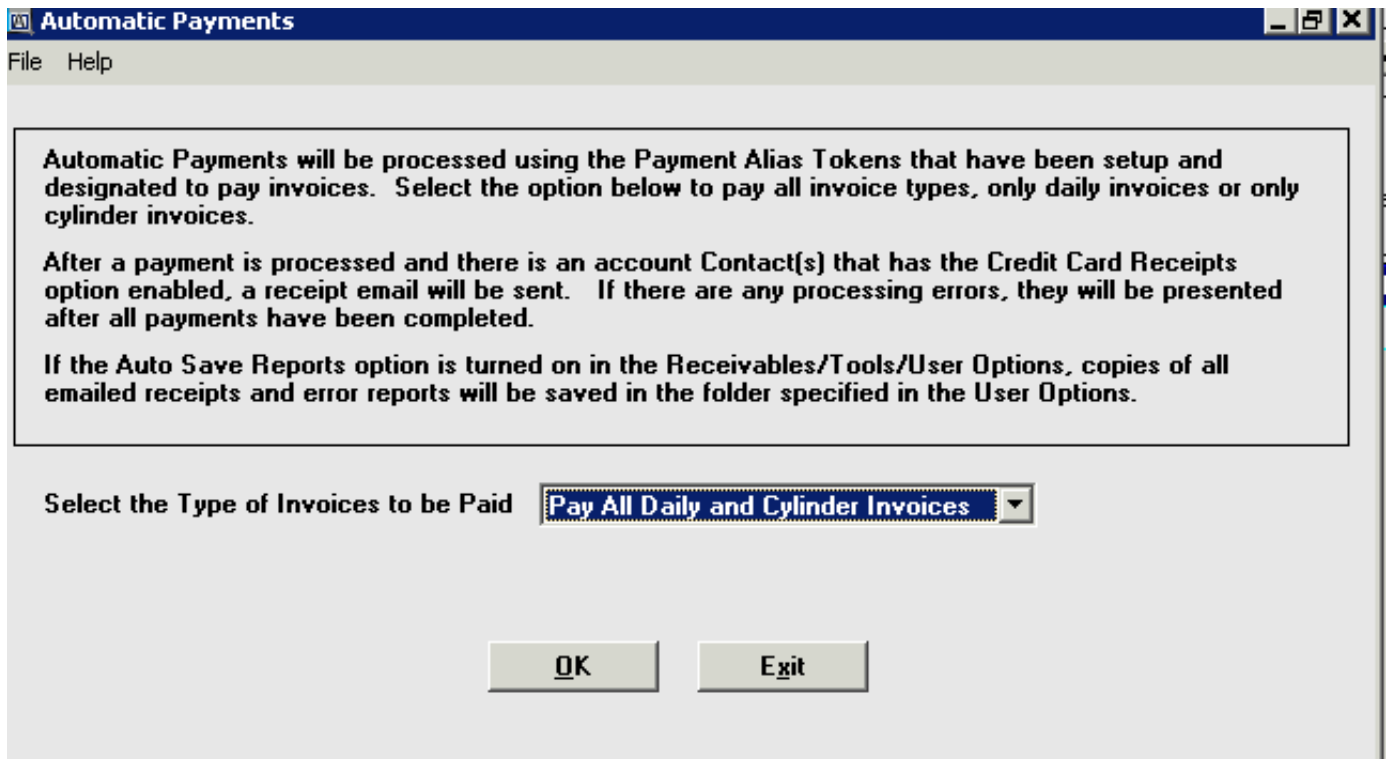
	Email	Fax	Email	Fax
Daily Invoices	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Ecommerce Promotions	<input type="checkbox"/>
Cylinder Invoices	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Ecommerce Orders	<input type="checkbox"/>
Statements	<input checked="" type="checkbox"/>	<input type="checkbox"/>	iPhone Receipts	<input type="checkbox"/>
Order Report	<input type="checkbox"/>	<input type="checkbox"/>	Credit Card Receipts	<input checked="" type="checkbox"/>

OK Cancel Exit

The Automatic Payments program is located on the Cash Receipts menu and is only shown to users with the appropriate security settings

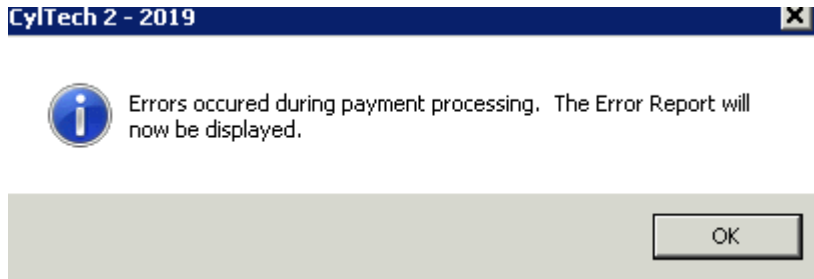


The Automatic Payments program makes it possible to select All Daily and Cylinder Invoices, Only Daily Invoices, or Only Cylinder Invoices.



The program will pay all daily invoices or cylinder invoices that are open on the customer's account. If the customer has a credit on their account, it should be applied before running this program.

When the program finishes, it will generate a message letting the operator know if there were any errors.



This is an example of the error report.

***** TESTWELD *****		Automatic Payment Errors	02/04/2020 PM 01:10
Account#	Payment Alias	Error Message	Page 1
100	DATAWELD VISA 1234	Expired Card	

Note: the credit card receipts are saved in the folder that is used in AR Tools > Autosave reports.

Dataweld Software

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