Credit Card set up and processing.
This lesson includes...

1. Default settings 0:30

2. Enable credit card processing for member application 4:38

3. MIC Bill Pay 6:27

4. Event Setup 9:17

5. Back office payment 13:00

6. Common credit card reports 15:25
Credit card setup and defaults

To find these options you will go to Setup > Billing Options & Settings > Credit Cards.

1. This enables the pay online option from within their Member Information Center.
2. Includes a link at the bottom of every invoice and statement so it is easy for your members to pay online with a credit card.
3. This person will receive notification from the database when a credit card transaction has been ran. This is separate from the one that may be sent by your processor.
4. This selection will allow you to take credit/debit card numbers (and also bank account information if also enabled) and securely store them so that you can setup recurring billing to their cards/accounts. Your members will be able to store their card/account information so purchases next time will be much quicker. This is an additional charge with Authorize.net.
5. This selection will allow you to receive payment by ACH (direct bank account withdrawal) if included as an option with your Authorize.NET agreement.
6. Check the credit card companies you will be accepting. It is best to check with your processor to make sure you are choosing the correct options.
7. Select any of additional fields that need to be required when the customer is paying online with a credit card.
8. This option will allow you to choose how the database will record the credit card payment for Member Applications, Hot deals or Job Postings, and member payments. Events have their own settings.
9. Allows you to display Terms and Conditions if required by your credit card processor.
Enable credit card processing for the Online Member Application

Setup > Member Options > Define Membership Packages > General tab

1. To enable credit card processing for the application check the box **Accept Credit Card Payments**

2. **Auto-approve applications paid by Credit Card**: When selected, membership applications paid by credit card will automatically be changed from Prospective ot Active status.

3. **Auto-create paid invoice or receipt**: When selected, an invoice and payment or a sales receipt will automatically be created for the applicant and saved on their account. In order for that to happen, Auto-approve applications paid by Credit Card must be selected.
How members can pay bills online.

1. The member needs to first, login to their Member Information Center (MIC)
2. In the upper right they will see a box with their Account Balance they can click **Pay**

![Account Balance](image1.png)

3. Next they need to select which invoice(s) to pay.
   a. If the invoice they wish to pay is not listed they can click **Make an additional payment** and enter in the amount and any details about the payment.

![Make a Payment](image2.png)

4. Click **Continue**
5. A summary screen will appear allowing the user to remove any items they don’t want to pay for from their check out card
6. Click **Checkout**
7. Complete the credit card checkout screen, select to agree to the payment terms (if applicable) and click **Checkout**.

8. A confirmation screen will appear. The email address entered on the credit card information screen will receive an email with the confirmation information as well. If you have notifications enabled for a specific staff person to be notified when a member bill pay is done your selected staff member will receive an email as well.
Record a payment made using ‘Make Additional Payments’

1. The member needs to first, login in their Member Information Center (MIC)
2. In the upper right hand corner click the Settings button

3. Click Billing on the left hand menu

4. Select Make a Payment

5. Click the link Make an additional payment

6. The member will enter in the amount they would like to pay in the Additional Payment Amount box and a Comment is required before clicking Continue
7. In the **Checkout** box they can review their order and click **Checkout** to enter in their credit card information.

8. Complete the credit card checkout screen, select to agree to the payment terms (if applicable) and click **Checkout**.

Record the additional payment

1. In the **Task List** click on **Mbr Payments**

```
Task List

1 Mbr Signups
0 Hot Deals
1 MarketSpace
5 News Releases
0 New Events
1 Job Postings
1 Pub Requests
0 Reminders
13 Mbr Payments
12 Invoices
0 Web Leads
```

2. This area will show you the detail of the additional payment.

<table>
<thead>
<tr>
<th>Status</th>
<th>Trn Date</th>
<th>Member</th>
<th>Notes</th>
<th>Amount</th>
<th>PN Ref</th>
<th>Auth Code</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td>08/30/15 11:44am</td>
<td>Magnificent Uits</td>
<td>Renewal payment</td>
<td>0.00</td>
<td>0</td>
<td></td>
<td>[details]</td>
</tr>
<tr>
<td>New</td>
<td>08/31/15 02:00pm</td>
<td>Magnificent Uits</td>
<td>Bills</td>
<td>0.01</td>
<td>0</td>
<td></td>
<td>[details]</td>
</tr>
<tr>
<td>New</td>
<td>09/15/15 10:02am</td>
<td>Silver Spoon Diner</td>
<td>Chamber Membership - 11-20 emp</td>
<td>300.00</td>
<td>0</td>
<td>New Membership Application for Silver Spoon Diner [details]</td>
<td></td>
</tr>
</tbody>
</table>

3. Once you have the information from the additional payment you will then go to the appropriate member record and record the payment.

4. When the payment has been properly recorded you can go back to **Mbr Payments** and update the status to **Completed**.
Enable credit card as payment method for an event.

1. Click Events in the left-hand menu.
2. Select the desired event
3. Click the Fees tab.
4. Ensure that fees have been assigned for this event
5. Open the Registration and Billing Preferences area
6. Select “Allow members to register online for this event” and/or “Allow non-members to register online for this event”.
7. Then select “Allow registrant to make payment with a credit card (online only) for members and/or non-members”.
8. Double-click your preferences for Credit Card Payment Tracking Options and Invoice and Receipt Options
9. Click Save

Note: Now when someone registers for an event, they will have the option to pay by credit card. You may also register and pay by credit card on behalf of a guest by clicking Add New Registration on the Guest List tab.

If the Credit Card Payment Tracking Options indicate that an invoice/payment or sales receipt should be created, these transactions are created automatically when the credit card is processed. View these transactions by displaying the appropriate transaction summary on the Reports tab in the Billing module.
Back office payment

1. From the **Billing Center** use CTRL+F to find the member or open invoice you would like to apply the payment to.
2. In the Member information box click the **New Payment** button.
3. Enter the payment amount and payment details.
4. Choose Credit Card as the payment method. This will display the **Capture Payment** button.
   a. To set the **Capture Button** to the credit card option click on the heading Payment Method.
   b. Set the Capture Payment option to a specific payment method usually Credit Card.
5. Enter the credit card information
6. Click **Checkout**
7. In the **Checkout** screen click **Continue**
8. After the credit card information has been completed the payment window will appear. Make sure to save the payment.

Common credit card reports

1. **Credit Listing report** – This report shows you the payment details of all credit card transactions that have been run through the database.
   a. If you are using Authorize.net implementation you are able to refund the payment from the database if the transaction is > 24 hours old, transaction is not older than 120 days, and transaction was created after 4/1/2014.
   b. **Payment Summary** – The payment summary allows you the option to filter by date range, batch, payment method or item type. You are able to use these filters to get the exact payment information you need.