



Credit Card set up and processing.

This lesson includes...

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3. MIC Bill Pay 6:27
4. Event Setup 9:17
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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.

Credit Cards

1 Allow members and reps to make payments with a **Credit Card** through their Member Login account.

2 "Add link to bottom of email to pay bills online" selected by default when emailing invoices

Send an automatic notification email to the Chamber: 3

To set the payment method used on transactions created from credit cards go the Appearance area on this page.

4 Securely store credit/debit card information for re-use (Must have CIM enabled with Authorize.NET) ?

5 Allow payment with bank account information (Must have ACH enabled with Authorize.NET) ?

Warning! Specifying which cards you accept and the fields that are required must match what is selected for these settings with your credit card company. Do not change the settings here without also changing them with your credit card processing company.

Accept **Visa** on Credit Card screens.

Accept **MasterCard** on Credit Card screens. 6

Accept **American Express** on Credit Card screens.

Accept **Discover** on Credit Card screens.

Add Credit Card Billing **Phone Number** as required field.

Add Credit Card Billing **Email** as required field. 7

Add Credit Card Billing **Address** as required field.

Add Credit Card **Security Code** as required field.

8 **Automatically create a paid invoice for credit card payments.** ?

Automatically create a receipt for credit card payments. 8

Display Terms and Conditions agreement in checkout cart ? 9

Merchant or Store Name [Optional]: ?

Enable credit card processing for the Online Member Application

Setup > Member Options > Define Membership Packages > General tab

General

- Enable Member Application Form
- Send Automatic 'Thank You' Email

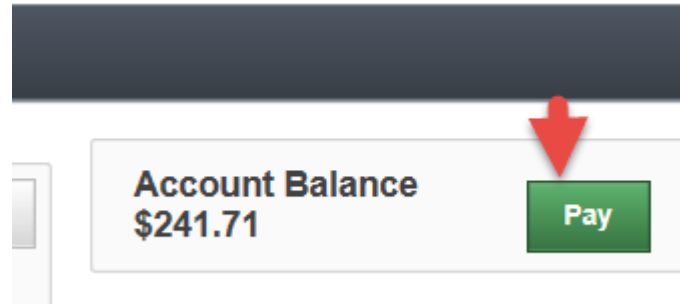
Payment Options ?

- Accept 'Bill Me' Payments
- Auto-approve applications paid by Credit Card
- Accept Credit Card Payments
- Auto-create paid invoice or receipt

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 to 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**



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

Use this screen to make direct credit card payments to your account.

Open Invoices (3)				Selected Invoice Total
<input type="checkbox"/> Invoice #	Details	Subtotal	Balance Due	Payment Amount
<input type="checkbox"/> 2436	Bill To: lily bean Date: 1/15/2016 Due: 1/15/2016 (3 Days past due) \$20.85 1-10 Full Time Employees Dues <input type="checkbox"/> 8.33 \$8.33 Marketing upgrade (voluntary)	29.18	20.85	<input type="text" value="0.00"/>
<input type="checkbox"/> 2416	Bill To: lily bean Date: 1/14/2016 Due: 1/14/2016 (4 Days past due) \$20.86 1-10 Full Time Employees Dues <input type="checkbox"/> 8.34 \$8.34 Marketing upgrade (voluntary)	29.20	20.86	<input type="text" value="0.00"/>
<input type="checkbox"/> 2362	Bill To: lily bean Date: 1/8/2016 Due: 1/8/2016 (10 Days past due) \$450.00 Top package	400.00	300.00	<input type="text" value="0.00"/>

▶ [Make an additional payment](#)

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**

Checkout

Mickie Cat 1 Items

Payment for Invoice #2362 (Magnificent Mutts) Count: 1

\$300.00

\$300.00 Checkout >

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

Checkout

Mickie Cat **\$300.00**

Online Credit Card Payment.

*Card Number: *CSC: ?

*Expiration Date: / Securely Save this Card

01 / 2017

First Name: Last Name:

Mickie Cat

Company Name:

Magnificent Mutts

Street:

456 main ave.

City: State: Postal Code:

somewhere MN 12345

Country:

United States

Phone: Email:

(123) 456-7890 mf123@gmail.com

[< Back](#) Checkout >

- 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.

Checkout

Checkout Successful

Payment for Invoice #2362 (Magnificent Mutts) Count: 1

\$300.00

Transaction ID: 0
CC Number: 0027
Amount: \$300.00

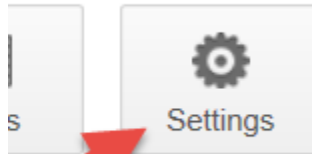
A copy of this receipt has been emailed to mf123@gmail.com

Thank you,
Support-Melissa Frame

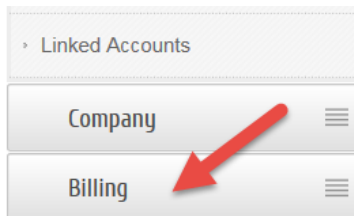
Continue

Record a payment made using 'Make Additional Payments'

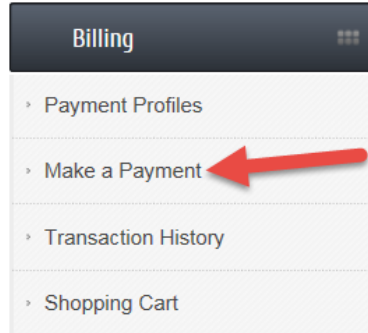
1. The member needs to first, login in their Member Information Center (MIC)
2. In the upper right hand corner click the **Settings** button



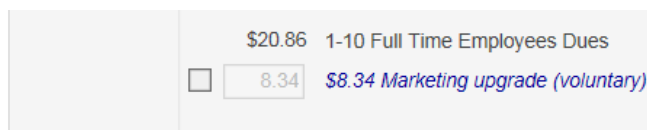
3. Click **Billing** on the left hand menu



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**

- In the **Checkout** box they can review their order and click **Checkout** to enter in their credit card information.
- Complete the credit card checkout screen, select to agree to the payment terms (if applicable) and click **Checkout**.

Record the additional payment

- In the **Task List** click on **Mbr Payments**



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

entries 1 - 13 of 13 Display 50 results per page.

Member Bill-Pay Entries							
Status	Txn Date	Member	Notes	Amount	PN Ref	Auth Code	Action
New	08/28/15 11:44am	Magnificent Mutts	Renewal payment	50.00	0	Renewal payment	details
New	08/31/15 02:06pm	Magnificent Mutts	bills	0.01	0	bills	details
New	09/15/15 10:02am	Silver Spoon Diner	Chamber Membership - 11-20 emplo	300.00	0	New Membership Application for Silver Spoon Diner	details

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

Registration and Billing Preferences 5

Online Registration Options

6 **Allow members to register online for this event.**
Active, Courtesy members receive "Member" pricing;
Non-Member, Prospective members receive "Non-member" pricing

7 **Allow registrant to make payment with a Credit Card (online only).**
 Allow registrants to request to be **Invoiced** for fees incurred.
 Allow registrants to specify that they will pay by **Cash or Check** at the time of the event.

Allow non-members to register online for this event.
 Allow registrant to make payment with a **Credit Card** (online only).
 Allow registrants to request to be **Invoiced** for fees incurred.
 Allow registrants to specify that they will pay by **Cash or Check** at the time of the event.

Disallow online registrations after

Allow online registrants to include multiple attendees on a single registration.

Send an automatic Registration Confirmation email to consumers registering online.

Send an automatic Registration Notification email to our association at

Invoice and Receipt Options

8 Assign **non-member** invoices or receipts to a single Member: [Non member event registrant](#)

Create a **new Member** for each non-member participant that pays by credit card to assign the invoice/receipt to.

Credit Card Payment Tracking Options

8 Create a new Invoice and Payment for each Credit Card Payment.

Create a new Sales Receipt for each Credit Card Payment.

Do not create Credit Card Payment records.

Save Preferences 9

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.