Adding a Customer Credit Card

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This guide explains adding a customer credit card to aACE without charging it. It is intended for advanced users.

aACE allows you to manually input a credit card for verification without charging the card. The secure payment processing services store all sensitive account data and provides a randomly generated alias, known as a token, for use in future aACE transactions.

You can do this in the following modules:

- Sales and production orders
- Receipts
- Recurring Transactions
- Projects
- Companies

The process for the Orders, Receipts, Recurring Transactions, and Projects modules is the same.

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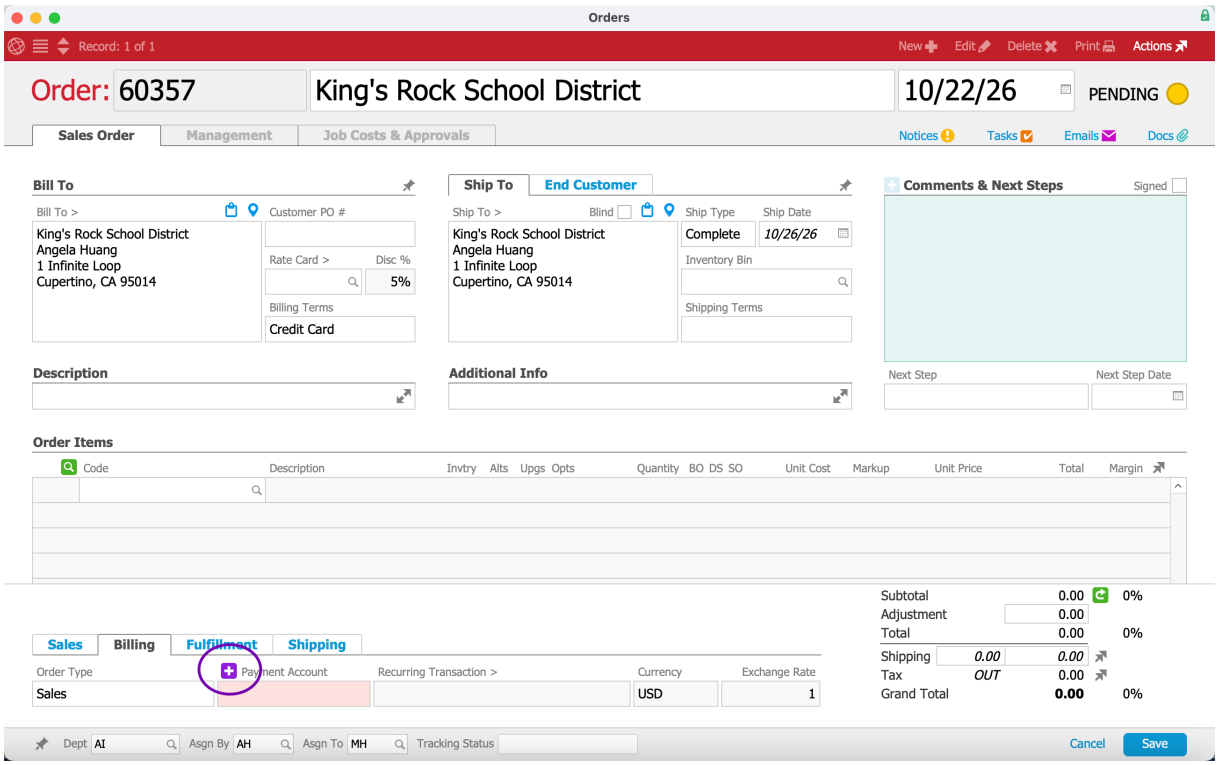
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- Designating a Preferred Credit Card

Adding and Verifying a Credit Card from Orders, Receipts, and Recurring Transactions

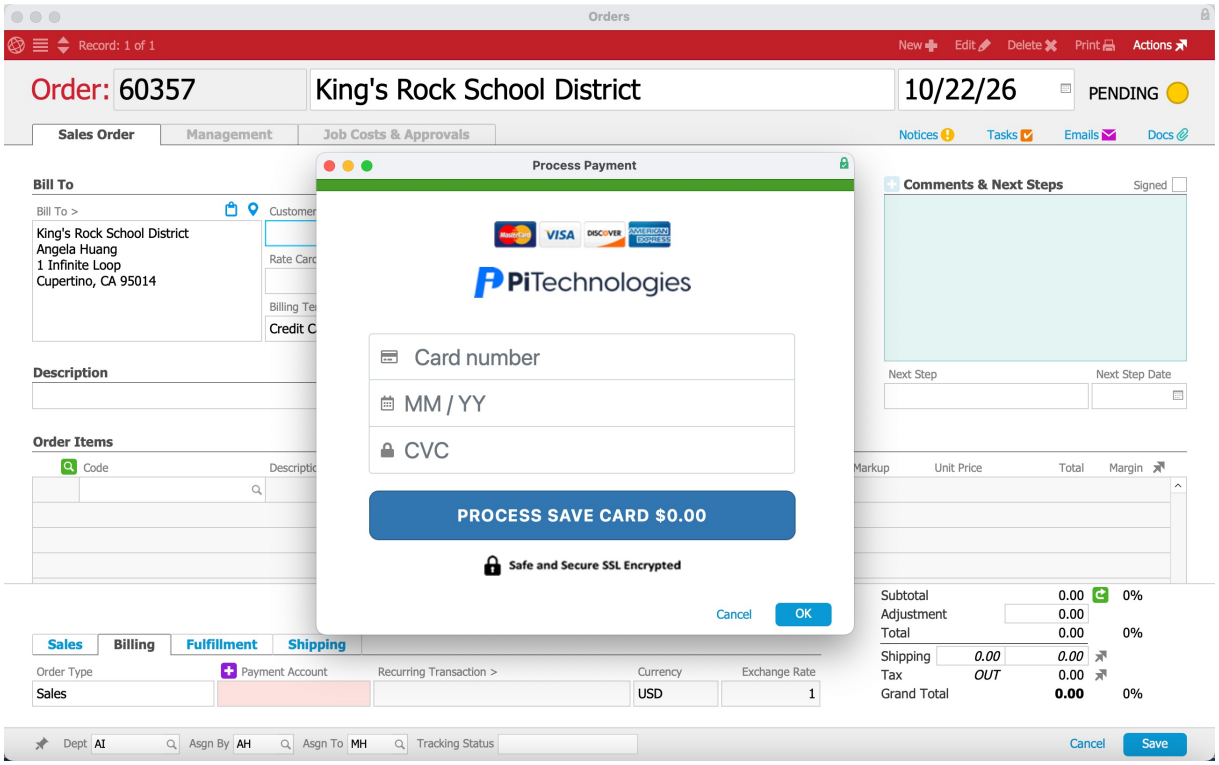
The following workflow uses the Orders module as an example. To add and verify a credit card from an order, receipt, recurring transaction, or project record:

1. From the Main Menu, go to **Order Management** > **Orders**.
2. Use the Quick Search bar to locate the order you're working with, then select the **Go-To icon** (>).

3. Select **Edit**, then select the **Add icon** ( ) for the Payment Account field.
   If your aACE system has ACH payments enabled, aACE asks if you want to enter a credit card or bank account. Select bank account.

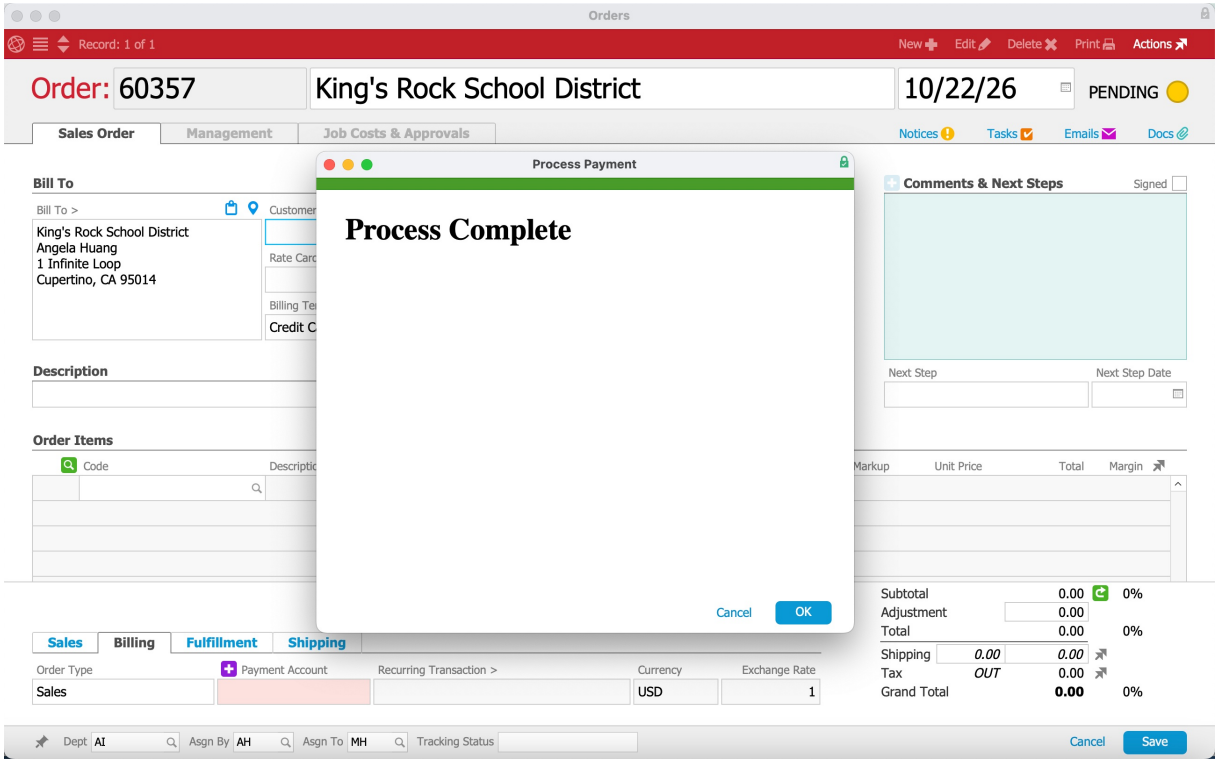


4. In the Process Payment dialog, enter the card number, expiration, and CVV number.

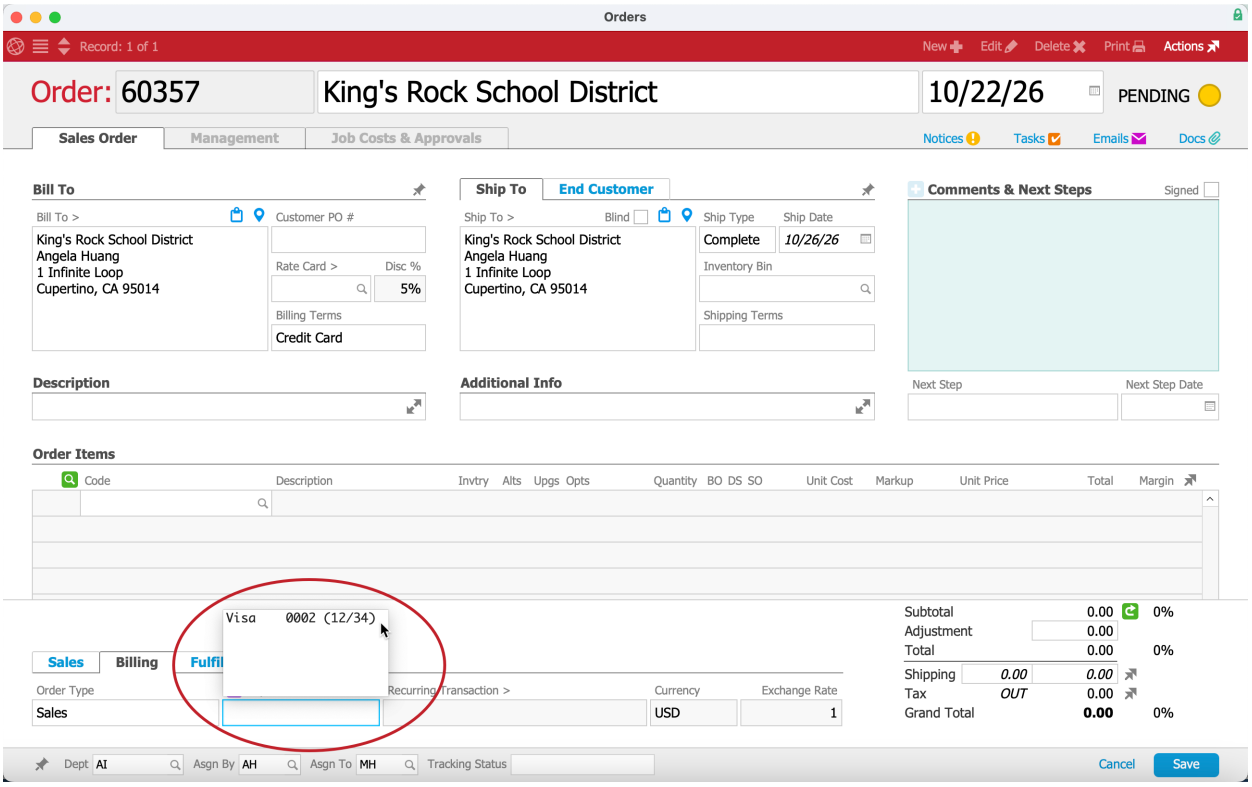


5. Select **Process Save Card $0.00**.
   The payment processor uses a transaction of $0.00 to verify the credit card. Once the card is verified, the Process Payment dialog shows Process Complete.

6. Select **OK**.



After the payment method is stored in aACE, you can use the card in transactions by selecting the credit card.

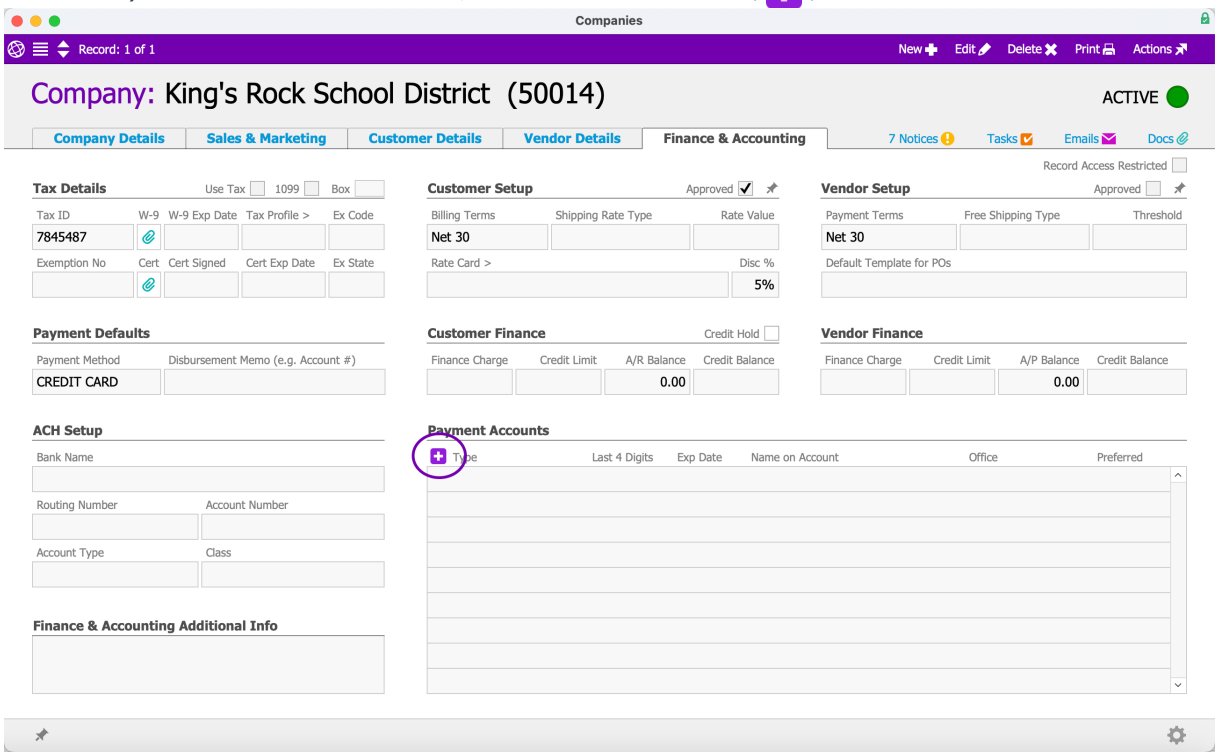


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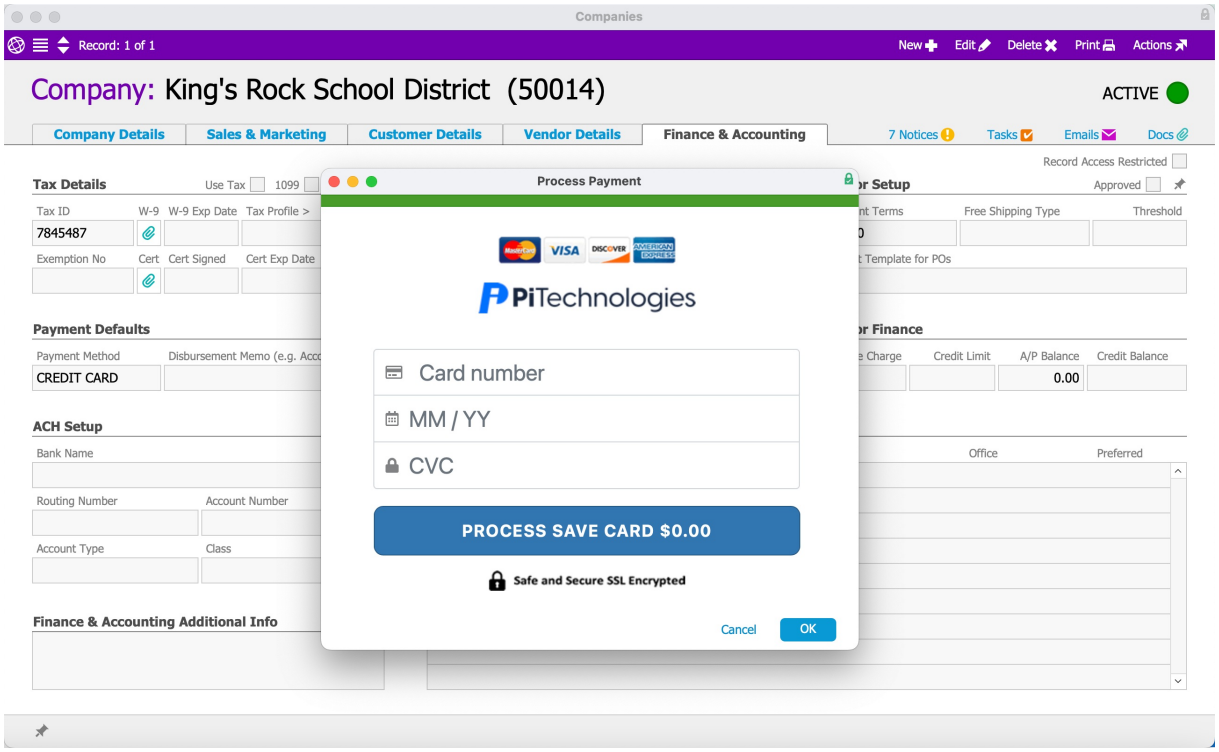
Adding and Verifying a Credit Card from Companies

To add and verify a credit card from the customer company record:

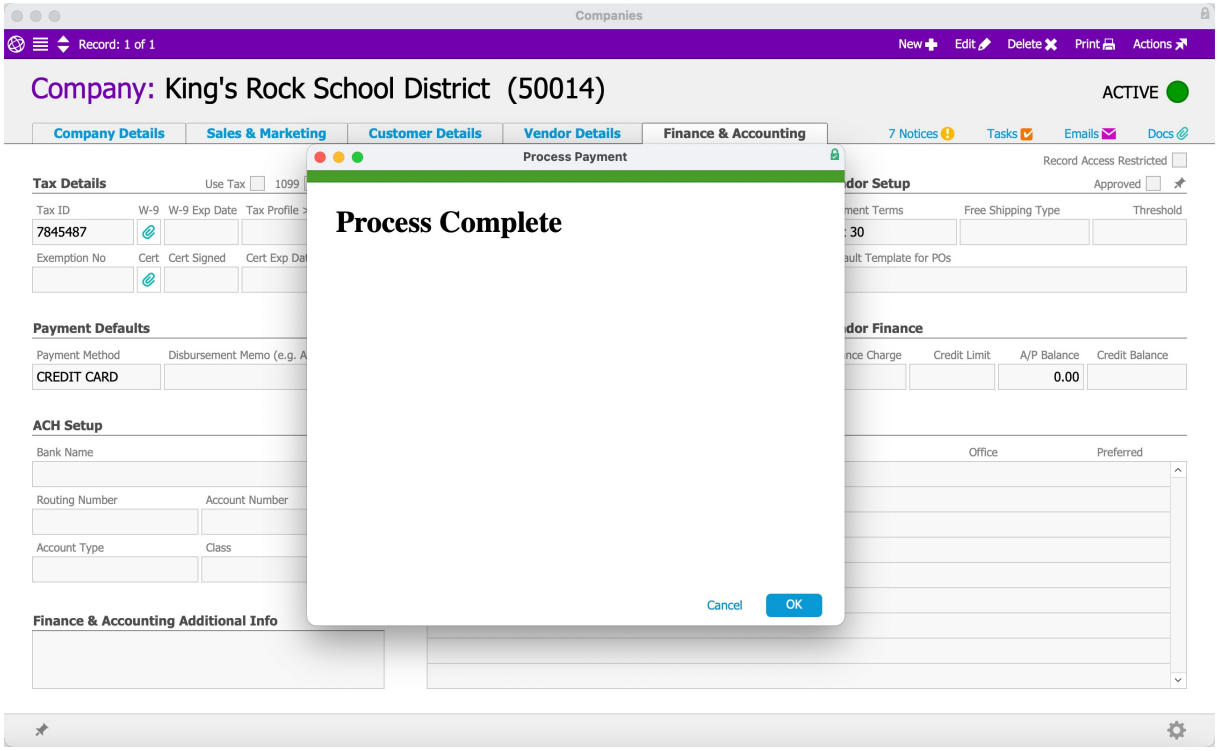
1. From the Main Menu, go to **CRM & Sales** > **Companies**.
2. Use the Quick Search bar to locate the customer company record, then select the **Go-To icon** (>).
3. Select the **Finance & Accounting** tab.
4. In the Payment Accounts section, select the **Add icon** ( ).



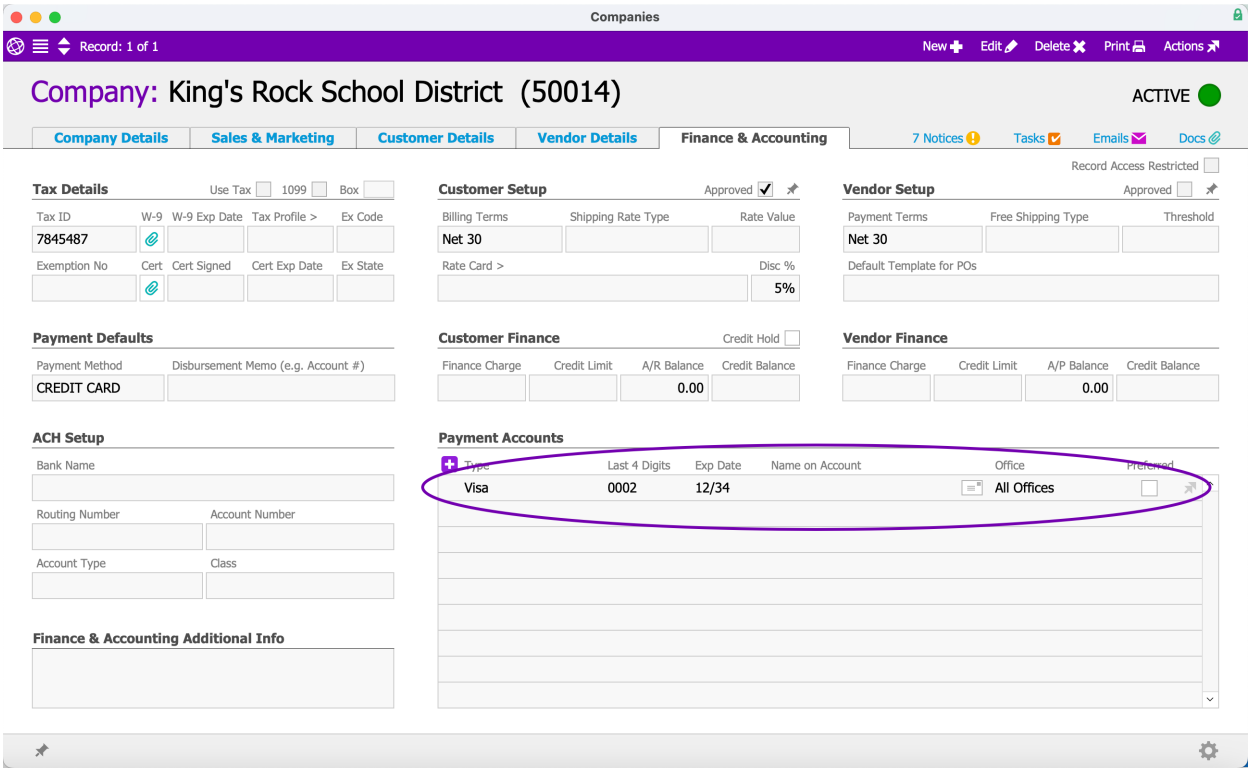
5. In the Process Payment dialog, enter the card number, expiration, and CVV number.



6. Select **Process Save Card $0.00**.
   The payment processor uses a transaction of $0.00 to verify the credit card. Once the card is verified, the Process Payment dialog shows Process Complete.
7. Select **OK**.



The credit card appears in the Payment Accounts section and can be used on orders, receipts, recurring transactions, or project records.

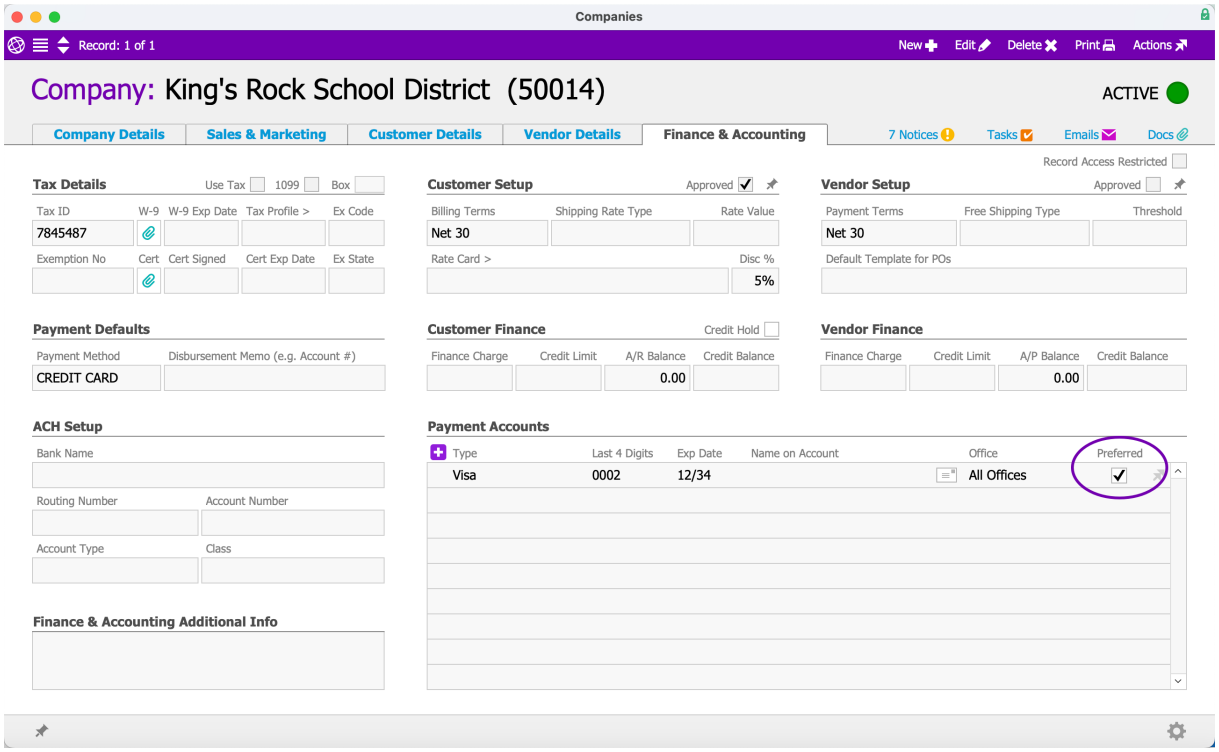


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Designating a Preferred Credit Card

At the customer company record, you can designate a preferred credit card that aACE automatically selects on orders, receipts, recurring transactions, or project records:

1. From the Main Menu, go to **CRM & Sales** > **Companies**.
2. Use the Quick Search bar to locate the customer company record, then select the **Go-To icon** (`>`).
3. Select the **Finance & Accounting** tab.
4. Select the Preferred preference for the credit card.


Companies
Record: 1 of 1
New
Edit
Delete
Print
Actions
Company: King's Rock School District (50014)
ACTIVE
Company Details
Sales & Marketing
Customer Details
Vendor Details
Finance & Accounting
7 Notices
Tasks
Emails
Docs
Record Access Restricted
Tax Details
Use Tax
1099
Box
Tax ID
W-9
W-9 Exp Date
Tax Profile >
Ex Code
7845487
Exemption No
Cert
Cert Signed
Cert Exp Date
Ex State
Customer Setup
Approved
Billing Terms
Shipping Rate Type
Rate Value
Net 30
Rate Card >
Disc %
5%
Vendor Setup
Approved
Payment Terms
Free Shipping Type
Threshold
Net 30
Default Template for POs
Payment Defaults
Payment Method
Disbursement Memo (e.g. Account #)
CREDIT CARD
Customer Finance
Credit Hold
Finance Charge
Credit Limit
A/R Balance
Credit Balance
0.00
Vendor Finance
Finance Charge
Credit Limit
A/P Balance
Credit Balance
0.00
ACH Setup
Bank Name
Routing Number
Account Number
Account Type
Class
Finance & Accounting Additional Info
Payment Accounts
Type
Last 4 Digits
Exp Date
Name on Account
Office
Preferred
Visa
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All Offices