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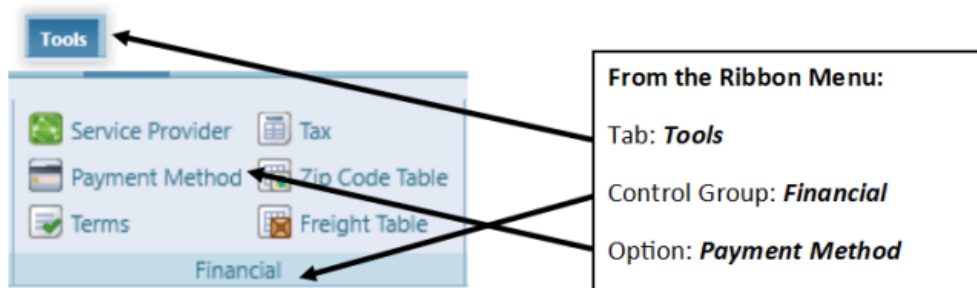
Portal > Knowledgebase > ASI SmartBooks Knowledgebase > PromoPayment > How Do You Setup a Payment Method?

How Do You Setup a Payment Method?

Tammy Mason - 2024-02-26 - in PromoPayment

How Do You Setup a Payment Method?

Payment Method Resource **must** be created for each Service Provider you plan to use in ASI SmartBooks.



Select **New** and enter your payment method information.

Type: Select Customer from the *Type* drop-down list to receive payments from the Customer.

Description: Enter the description or name for this credit card payment method.

Account: From your Account list, select the bank account where these payments will be deposited.

Credit Card: Check this if this is a credit card payment.

New Copy Save Delete Cancel Close

Type: Customer

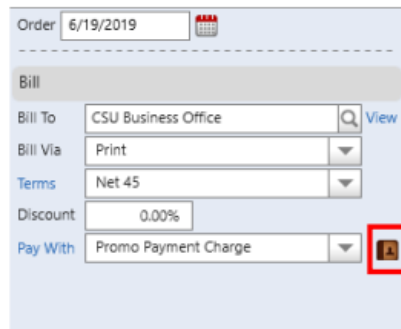
Description: Visa with Vault Credit Card

Account: 102 Visa - PromoPayment Provider Name: Promo Payment

Provider Name—When the Credit Card selection is checked, the Provider Name will display. Select the **PromoPayment** Service Provider to be utilized with this Payment Method resource.

PromoPayment – Authorize and Capture – Optional

- Within an order for a customer, you can enter the credit card information under the Bill To by selecting the Payment method you've setup, in the Pay With field and then click the icon.



Order 6/19/2019

Bill

Bill To CSU Business Office View

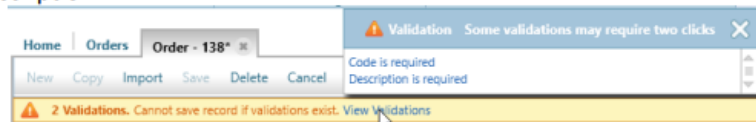
Bill Via Print

Terms Net 45

Discount 0.00%

Pay With Promo Payment Charge

- If you see this validation message appear verify that all your product lines have a Code and Description.




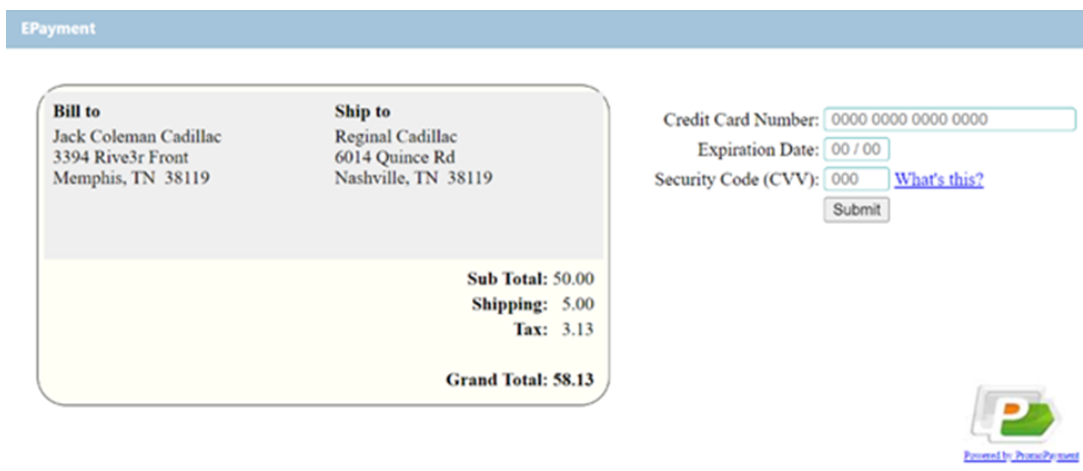
Home Orders Order - 138*

Validation: Some validations may require two clicks

Code is required
Description is required

2 Validations. Cannot save record if validations exist. View Validations

- Click the authorization action button .
- A new window will open to enter the credit card number, expiration date and security code and submit. This will authorize the amount using the overage percentage from the Service Provider setup. (if there is one)




EPayment

Bill to
Jack Coleman Cadillac
3394 Rive3r Front
Memphis, TN 38119

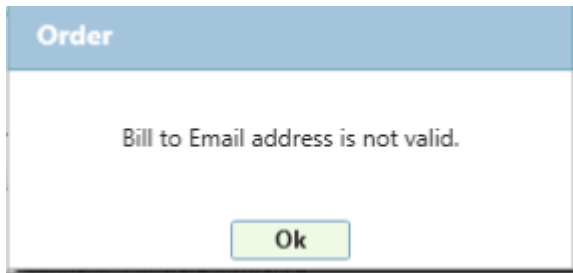
Ship to
Reginal Cadillac
6014 Quince Rd
Nashville, TN 38119

Sub Total: 50.00
Shipping: 5.00
Tax: 3.13
Grand Total: 58.13

Credit Card Number: 0000 0000 0000 0000
Expiration Date: 00 / 00
Security Code (CVV): 000 [What's this?](#)
Submit


Payment

Note: Under the Bill to Address expander of an order there must be a valid email address entered or you will receive this message.

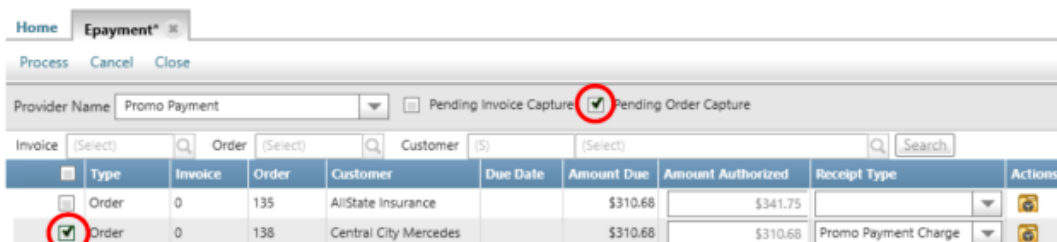


- Within the Totals Expander of the order, you will now see an Authorized/Not Captured amount.

Totals					
	Margin including Freight *		Margin excluding Freight *		
Prices					
+ Goods/Services	\$50.00	86%	\$50.00	100%	
- Discount	0.00	0%	0.00	0%	
+ Freight	\$5.00	9%	0.00	0%	
+ Sales Tax	\$3.13	5%	0.00	0%	
Total Price	\$58.13	100%	\$50.00	100%	
- Deposit	0.00	0%			\$58.13 Authorized/Not Captured
Unpaid Amount	\$58.13	100%			
Costs					
- Goods/Services	\$38.60	70%	\$38.60	77%	
- Freight	\$5.00	9%	0.00	0%	
Gross Margin	\$11.40	21%	\$11.40	23%	
- Commission	\$5.13	9%	\$5.13	10%	
Net Margin	\$6.27	12%	\$6.27	13%	
* Margin calculations do not include tax amount					

PromoPayment – Capture – Optional

When you are ready to post the credit card, within Epayment, (Customer – Receipt – Epayment), select your provider name, check the box for Pending Order Capture to see what orders have been preauthorized or select the order you are ready to post. Check the orders to process and the payment will be captured and applied to the order as a deposit when you process.



After the Authorize

Totals		
Prices		
+ Goods/Services	\$290.36	93%
- Discount	0.00	0%
+ Freight	0.00	0%
+ Sales Tax	\$20.32	7%
Total Price	\$310.68	100%
- Deposit	0.00	0%
Unpaid Amount	\$310.68	100%

\$310.68 Authorized/Not Captured

After the Capture

Totals		
Prices		
+ Goods/Services	\$290.36	93%
- Discount	0.00	0%
+ Freight	0.00	0%
+ Sales Tax	\$20.32	7%
Total Price	\$310.68	100%
- Deposit	\$310.68	100%
Unpaid Amount	0.00	0%

If the order has been invoiced before posting the credit card, within Epayment, and after selecting your Provider name, check the box for Pending Invoice Capture to see what was preauthorized and is ready to be posted.

Home **Epayment**

Process Cancel Close

Provider Name: Promo Payment Pending Invoice Capture Pending Order Capture

Invoice (Select) Order (Select) Customer (S) (Select) Search

Type	Invoice	Order	Customer	Due Date	Amount Due	Amount Authorized	Receipt Type	Actions
<input type="checkbox"/> Invoice	10023	137	State Farm insurance	7/18/2019	\$10.70	\$5.89		