How to Add Credit Card to Customer

Here are the steps on how to add a credit card to the customer:

1. Click the Sales menu and Click Customers. This will open the Customer Search screen.

New Open Import Refre	ish Excel PDF Text CSV Clos	e						
Customers Pricing Trans	sport Quote Transport Mileage 1	Tax Exemptions						
Si View Q, Filter (F3)	92 record(s)							
Entity No	Name 🔦	Phone	Address	City	State	Zip Code	Currency	Active
1005252	1099 example vendor		16125 Aquila Court	Huntertown	IN	46748	USD	
0001005152	A & A Construction Company	777777	8629 Marine Drive xxxx	Vancouver	WA	98663	USD	~
0001005153	A & L Inc.		800 Hi Way 99	Vancouver	WA	98661	USD	~
0001005132	A1 Portal Farms, Inc.		5923 Co. Rd 1-2	Swanton	ОН	43558	USD	~
0001005057	ABC Trucking	(555) 555-1234	4242 Flagstaff Cv	Fort Wayne	IN	46815	USD	~
0001005076	Adept		4242 Flagstaff Cove	Fort Wayne	IN	46815	USD	~
1005322	ADM Grain Export						USD	~
0001005149	Advance Electric Company		123 Rochester Street	Vancouver	WA	98665	USD	~
0001005072	Advanced Solutions (heims d	555-666-2222	1901 Nelson Miller Parkway	Louisville	KY	40223	USD	~
1005258	Ahold Delhaize Coffee Compa.		EORI No. NL002230987 c/o H	Sneek		8604EW	USD	~
0001005060	All U Need Kwik-Stop	260-555-4115	1234 Main Street	Fort Wayne	IN	46802	USD	~
0001005154	American Piping						USD	1
0001005157	Annette's Delivery service	5035551212	101 Main St.				USD	~
0001005004	Apple Spice Sales	260-969-8450	16125 Alta Drive	Fort Wayne	IN	46803	USD	~
1005229	Appleton Prospect		4242 Flagstaff Cove	Fort Wayne	IN	46815	USD	~
0001005008	Archer Daniels Midland	260-824-0079	1800 W Western Ave	Bluffton	IN	46714	USD	~
1005327	BAJ INVESTMENTS LLC.		12815 Northwest 45th Avenue	Opa-locka	FL.	33054	USD	~
0001005184	Bernhard Rothfos Intercafe A.	41417287260	Bahnhofstrasse 22	Zug			USD	~
0001005015	Bloomington Ag Services	(812) 574-5874	598 S. Clarizz Blvd	Bloomington	IN	47401	USD	~
0001005019	BP Oil North West Ohio		652 Starr Ave	Fort Wayne	IN	46818	USD	~
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- 2. Select Customer and click open toolbar button.
- 3. Navigate to Customer tab | Misc tab
 - a. Under Credit Cards, click add button and this will open Add Credit Card Screen and fill out the required fields.

Intity Customer	General Locations	Entity Type	Entity Type				
Detail Misc Appr	roval Pricing Taxing	Cancel 1 Buyback Contr	racts Field xRef				
Credit Details		🚵 📷 🔚 🌉 VISA 🍵 tatement Credit Limi	it 🗌				
Credit Limit	0.00000	Enter Credit Card Information					
Credit Stop Days							
Credit Code		* Card Number					
	Active 🔽 PO Rec	* Expiration Date mmyy					
Budget Details		* Card Security Code 3 or 4 digits					
Budget Begin Date							
Monthly Budget		* Name on Card Name as shown on card					
	Budget Schedule						
		Address Up to 40 chars					
Credit Cards		Postal Code Postal Code	er 🗌				
⊕ Add X Remove	Report 🔠 View	rint Price on Pick Tic	ket				
Type Credit C	lard	Save Card					
Discove Discove	er ending in 1111						
		Secure card processing services through this site are provided by Vantiv Integrated Payments. Please read the Terms of Use carefully. By selecting the "Submit" button, you agree to the Terms of Use.					
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b. Click Save Card

 $\textbf{c.} \ \ \mathsf{Prompt} \ \mathsf{message} \ \mathsf{will} \ \mathsf{be} \ \mathsf{displayed} \ \mathsf{once} \ \mathsf{card} \ \mathsf{is} \ \mathsf{successfully} \ \mathsf{added}$

Add Credit Card	*
ок	
	Approved
	The Credit Card was successfully added.
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d. Click Ok toolbar button and Add Credit Card screen will be closed. Added credit card is now available under Credit Cards grid.

tity Customer	Genera	Locations	Contacts	Split	Farm	History	Messages	Activities (0) Attach	ments (0)	Audit Log (25)	Entity Type			
etail Misc Ap	oproval	Pricing Ta	xing Grain	Agrir	nine	Patronage	License	Help Desk	Software	Transports	Commission	Buyback	Contracts	Field xRef	
Credit Details						Statement Detail Statement Credit Limit									
Credit Limit 0.00000 AR Balance 28				28.89	Statement	Format									
Fredit Stop Davs						0		Service Ch	arge						
Fredit Code							~	Last Servio	e Charge						
	Active	PO	Required	Cn	edit Ho	id 🗆		Apply Prep	paid Taxes						
								Apply Sale	s Tax						
udget Details								Calc Auto	Freight						
Budget Begin Date						Update Q	Jote								
Monthly Budget		0.00 No of Periods						Disc Schedule							
		Budget Sched	ule Tie	Budget	to Cus	omer Aging	5 🗆	Print Invoi	ce						
Import Budget Schedule						Link Custo	mer No								
								Referred b	y Custome	r					
redit Cards								Special Pri	ce Group		Ex	clude Dunnii	ng Letter		
) Add X Remo	K Remove Report 🔠 View Filter (F3)						53	Received 9	Signed Licer	nse 🗌	Pr	int Price on P	Pick Ticket		
Type Credit Card Expires							Include Na	ame in add	ress						
Discover ending in 1111 12/25															
Ame	rican Expr	ess ending in :	2000			12/25									