

myServiceCC

Payment Processing System

USER GUIDE



MyServiceForce, Inc
Support@MyServiceForce.com

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Introduction

Welcome to the User Guide for myServiceCC. In this guide we will focus on getting started with the core features and an explanation of optional services. Details on set up and use of those services are in separate documents. In addition to this document, help is available in the video tutorials on the myServiceForce YouTube channel and linked in our Support Section, and of course from our support staff via, chat, email, or phone.

To fully utilize all the features of myServiceCC it is necessary to use OpenEdge Payment Processing from Global Payments Integrated (GPI) and QuickBooks Online from Intuit. Additional benefits can be derived from using GPI software, most of which is free or at a nominal cost. If you already have those services or wish to purchase them yourself, we can still provide all functionality. If you would like to arrange for them through myServiceForce you get the additional benefits of available discounts and Tier 1 support.

NOTE: *Help is available from the “?” icon and Chat feature found on every page.*

Thanks for choosing myServiceCC!

[myServiceForce YouTube](#)

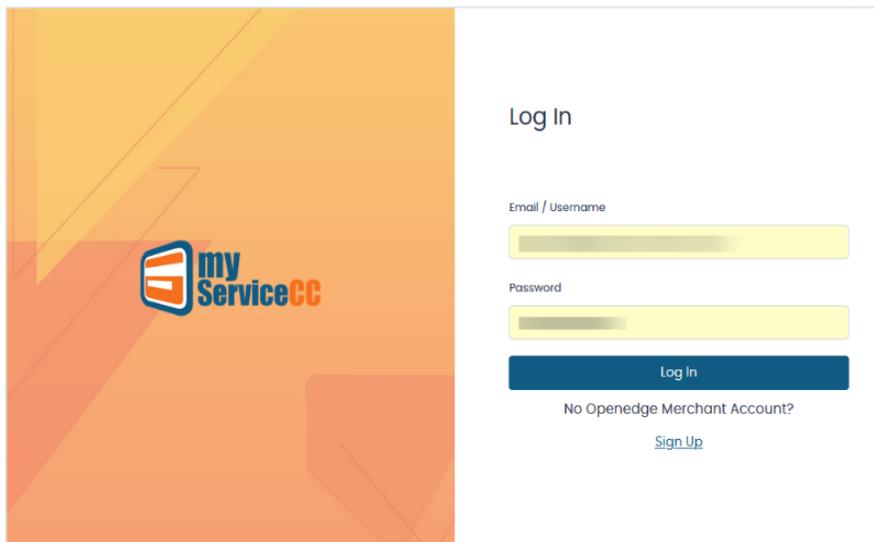
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Chapter 1: Getting Started

Logging into your myServiceCC Dashboard.

From the myServiceCC can be accessed either independently from it's login page <https://msfcc.myserviceforce.com/webterminal/msf/Login.aspx?> or in conjunction with any of myServiceForce's Business Management Software.

To begin enter the login information you were sent in the confirmation email.



Log In

Email / Username

Password

Log In

No Openedge Merchant Account?

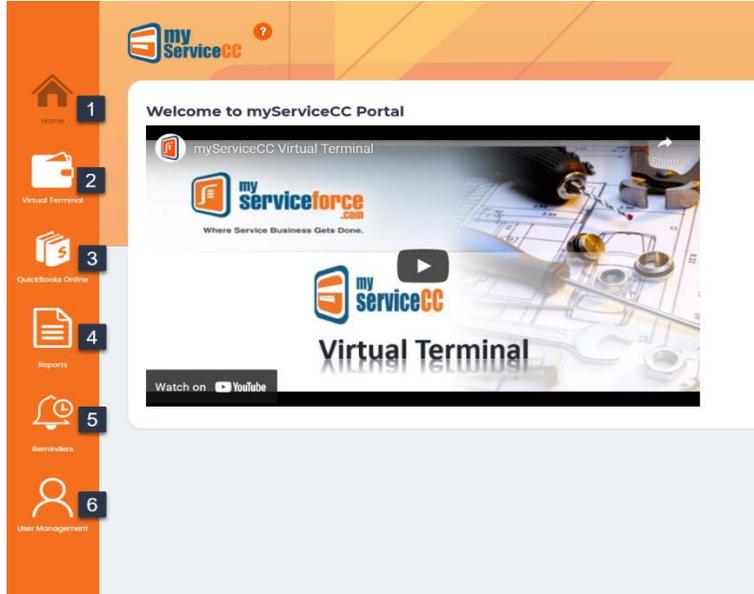
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From here you have access to:

1. Home Screen with YouTube Tutorial



2. Virtual Terminal for Payment Processing and Management
3. QuickBooks Online access
4. Reports
5. Reminders tab to create reminders to customers to complete payments.
6. User Management

Each of these are covered below.

Chapter 2: Virtual Terminal Payment Processing and Management

Overview – There are 4 tabs across the top, Sales, View Transactions, Recurring Payments, and Batch. Each is reviewed below. In general, this is where you can make manual transactions, see and manage all transactions made here or by remote device, manage refunds and voids, etc.

One important note. No sensitive payment information is stored anywhere in the Virtual Terminal. All information is sent to OpenEdge via strict encryption standards and stored in their systems.

Sales Tab

There are 4 options for processing payments: CC Processing (Credit/Debit Cards); ACH Processing (Bank Deposit using Routing Number and Bank Account); myPayLink (Customer payment link sent by *email or text message*); and, POS Processing (*Computer connected device or XcelranCC POS for iOS*).

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The screenshot shows the 'myServiceCC' interface. At the top, there's a navigation bar with 'Sales', 'View Transactions', 'Recurring Payments', and 'Batch'. Below this, there are four buttons: 'CC Processing', 'ACH Processing', 'myPayLink', and 'POS Processing'. The 'CC Processing' button is selected and highlighted with a red box. Below the buttons, there's a form with the following fields: 'Merchant *' (a dropdown menu with 'Select' as the current value), 'Name on Card *' (a text input field), 'Amount *' (a text input field), 'Invoice Number' (a text input field), 'Address' (a text input field), 'Zip Code' (a text input field), 'Email Address' (a text input field), and 'Reference ID' (a text input field). At the bottom of the form is a blue 'Next' button. The top right corner of the interface says 'Welcome! Demo User | Support | Logout'.

CC Processing

CC Processing is used for manually entering credit card information into the appropriate fields in the Virtual Terminal. Only those with an asterisk (*) are required but we advise at least adding zip code. The more information you gather the better for your costs and email is needed if you wish to send receipts.

Step 1: Select the Merchant Account if needed (i.e., you have multiple merchant accounts) and then complete the basic information (required highlighted) and click next.

This screenshot shows the same 'myServiceCC' interface as the previous one, but with a sidebar on the left. The sidebar contains icons for 'Home', 'Virtual Terminal', 'Facebook Connect', 'Reports', 'Reminders', and 'User Management'. The form fields are highlighted with yellow boxes: 'Merchant *', 'Name on Card *', 'Amount *', and 'Address'. The 'Next' button is also highlighted with a blue box. The top navigation bar and the 'CC Processing' button are also visible.

The screenshot shows the 'myServiceCC' logo at the top left. Below it is a navigation bar with tabs: 'Sales', 'View Transactions', 'Recurring Payments', and 'Batch'. The 'CC Processing' tab is selected. The form contains the following fields: 'Card Number' (masked as 'xxxx xxxx xxxx xxxx'), 'Expiry Date' (masked as 'MM / YYYY'), and 'CVV' (masked as 'xxx'). A blue 'Submit' button is located at the bottom of the form.

Step 2. Enter the Credit Card Numbers and click Submit.

Step 3. If approved, you will receive confirmation and payment details. This can be Printed, Emailed, or made available for reuse as a Card on File or regularly Recurring Transaction (covered in the Recurring Payments Tab below).

The screenshot shows a modal window titled 'Approved' with a 'Receipt' sub-header. The receipt details are as follows:

| | |
|----------------|---------------------------------|
| Trans ID: | 01a681c4ee644ca9f077522cf3a4a87 |
| Date/Time: | 6/1/2022 10:29:48 AM |
| Card Type: | Visa |
| Card Number: | 411111XXXXXX1111 |
| Approval Code: | 787732 |
| Description: | Test Description |
| Total Amount: | \$100.00 |

Below the receipt details, there is a 'Thank You!' section with four buttons: 'Close', 'Print Receipt', 'Email Receipt', and 'Make this Recurring'.

ACH Processing

ACH means Automated Clearing House and is the banking software that is used to process checks and direct payments to and from a bank account. If you have an ACH agreement with us, you can process payments from the bank **account number** and **bank routing number** that appear on a customer's check. You do not need anything else from the customer to use this method.

Step 1. Selecting ACH Processing

The screenshot shows the myServiceCC interface for ACH processing. At the top, there are tabs for 'Sales', 'View Transactions', 'Recurring Payments', and 'Batch'. Below these are three radio buttons: 'CC Processing', 'ACH Processing' (selected and marked with a '1'), and 'myPayLink'. The 'Merchant *' field (marked with a '2') is a dropdown menu showing 'Select' and a list of options: 'Demo Company Terminal-1' and 'Demo Company Terminal-2'. The 'Account Type *' field (marked with a '4') is a dropdown menu showing 'Choose...' and a list of options: 'Checking' and 'Savings'. The 'Payment Type' field (marked with a '3') is a dropdown menu showing 'Choose...', 'Personal', and 'Business'. The 'Check Number' field is empty. The 'Last name *' and 'Amount *' fields are empty. The 'Reference ID' field (marked with a '5') is empty. A 'Submit' button is at the bottom.

Step 2. Select Merchant Account if necessary.

Step 3. Select Payment Type: Personal or Business

Step 4. Select the Account Type: Checking or Savings

Step 5: Complete the remaining fields.

myPayLink Processing

Use this when you want to send your customer a link in email or SMS text which when clicked takes them to a secure payment site hosted by GPI OpenEdge. Optionally, it can also be used to give a consumer financing options. For more information [CLICK HERE](#).

Like the other options, required fields are marked with an Asterix. An email address is required. If a mobile number is added a SMS/text message will also be sent. If by email you can add files to it. (Note: if integrated with QBO and you want the QBO invoice to accompany the payment link use the process in the QBO tab (see below for details)).

If you want to send Reminders (default is Yes) make sure to create one in the Reminders Tab.

Customization of the myPaylink is available so that it conforms to your brand. See Appendix B for details.

POS Processing

POS (Point of sale) is used to do card in hand transactions. To use this option, you will need a Windows computer and a POS device supplied by myServiceForce. While you are able to use a standard printer for receipts, you may also want to get a receipt printer as well. For more information on POS devices and thermal receipt printers contact support at support@myServiceForce.com or click a chat link.

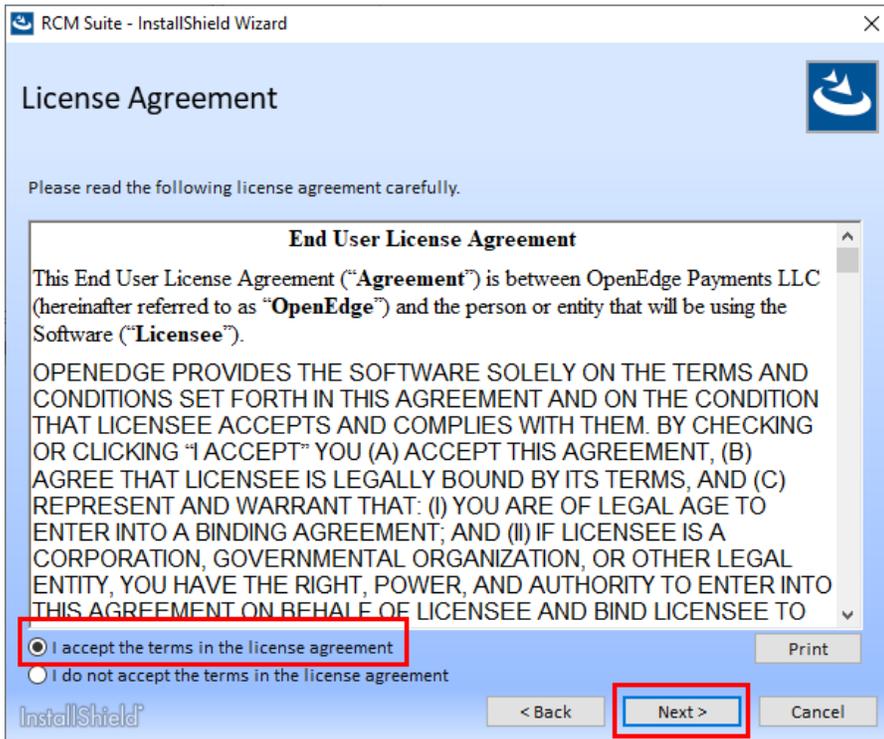
SETUP

Once you have the POS device, you must go through the setup process before using it. The POS device will plug directly into your computer via the connected USB cable. To set it up, follow the steps below.

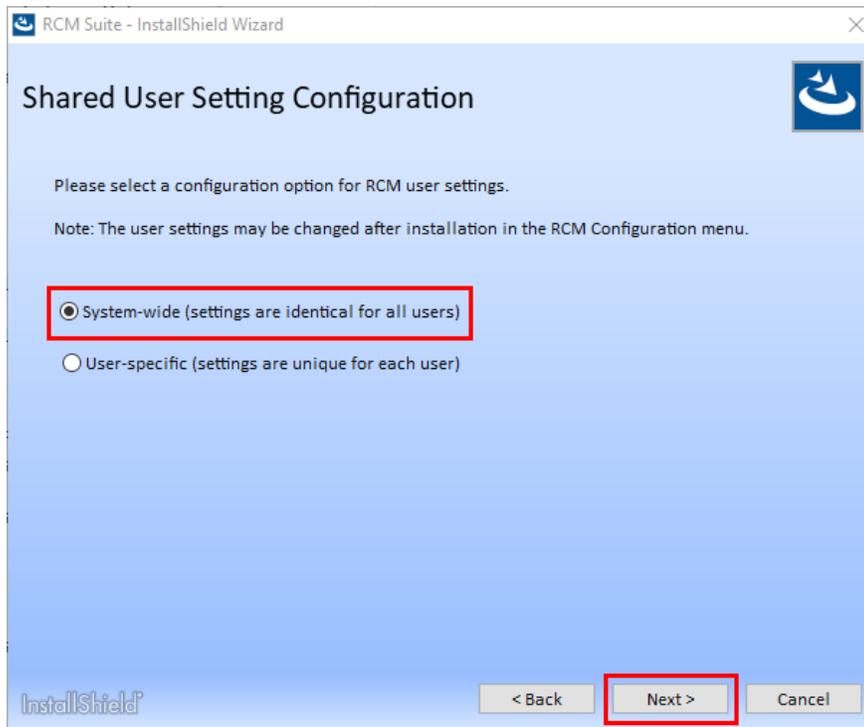
1. Connect the POS device to the computer. Wait for the screen to say “Ready” before moving to step 2. This may take a few minutes and the POS device may make some different sounds and power off and on at least once.
2. Download the Remote Client Manager (RCM) software by clicking on the following link. Please note that when you click on the link the file will automatically begin to download. Depending on your browser and browser settings, you may be prompted to take some sort of action before the file may be downloaded.

https://www.x-charge.com/downloads/files/RCM%20Windows_GA.exe

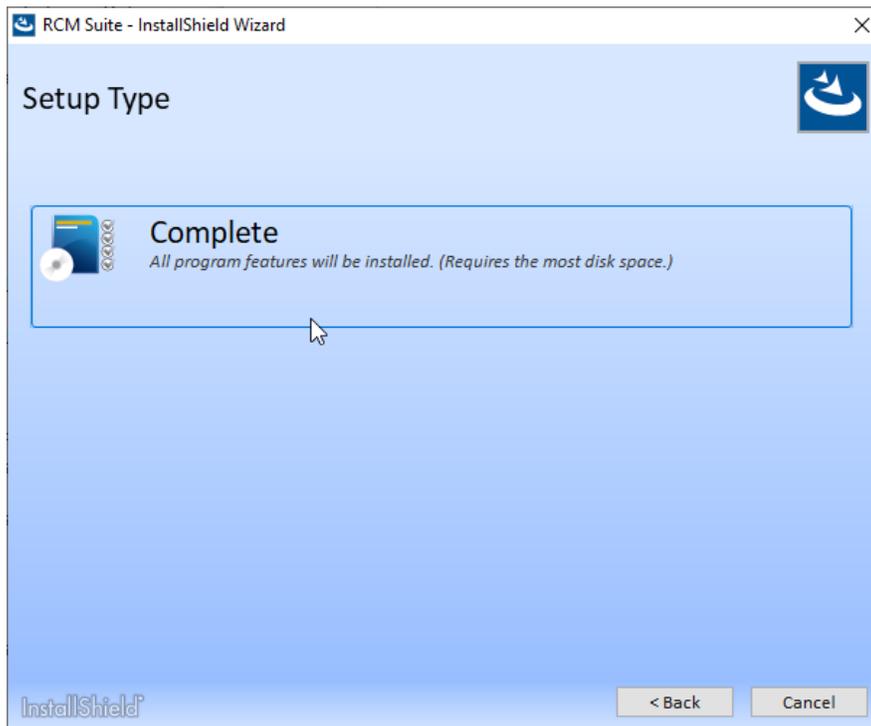
3. Locate the downloaded file (RCM Windows_GA.exe or similar) and double-click on it to run the setup program. If you see a window that asks if you want to allow the app to make changes to your device, click **Yes**.
4. Next you may see a License Agreement. If so, select “I accept the terms in the license agreement” and click **Next**.



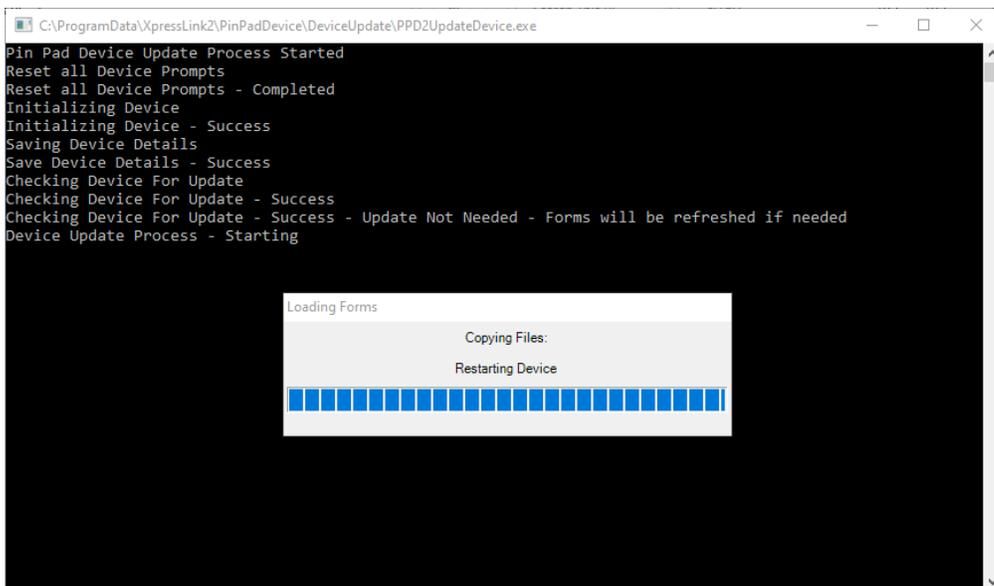
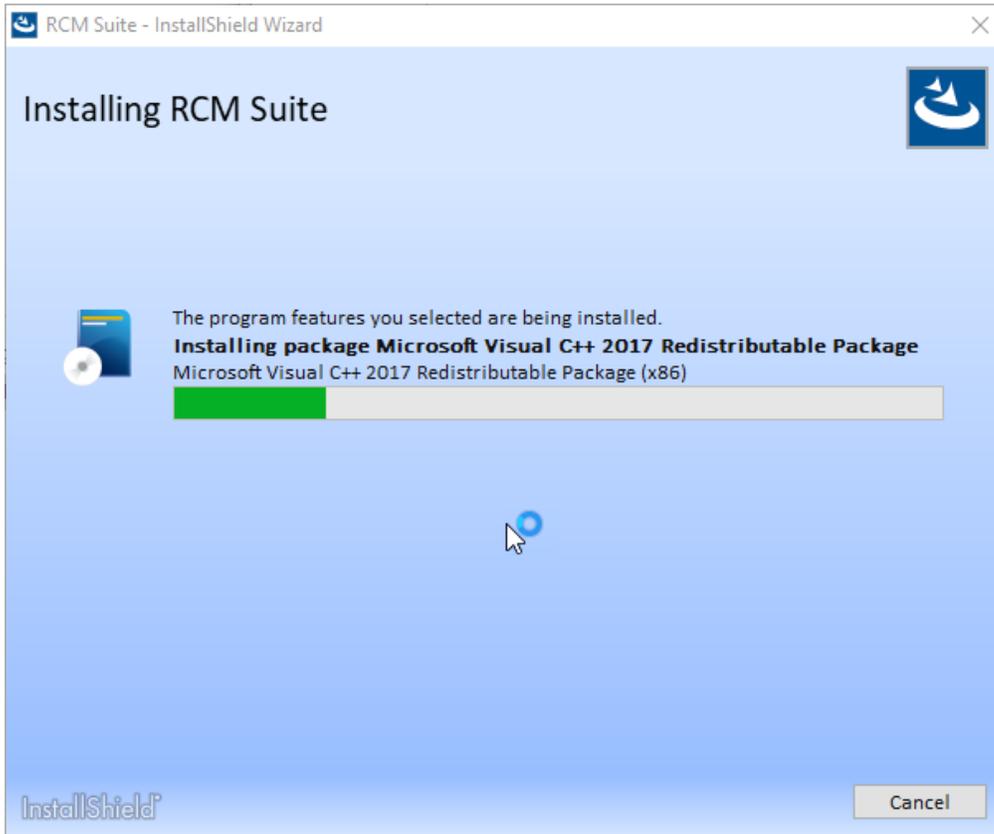
- On the *Shared User Setting Configuration* screen, select **System-wide** and click **Next**.



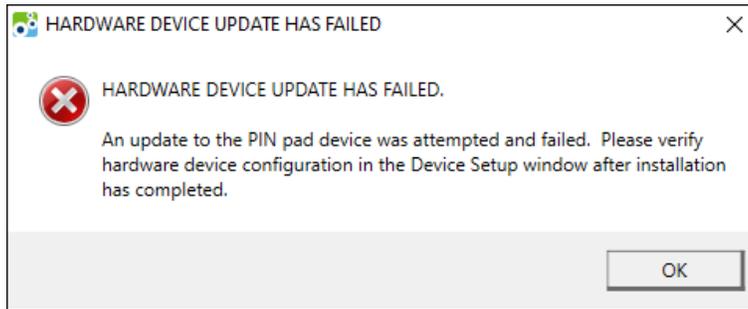
- For Setup Type click **Complete** (the only option).



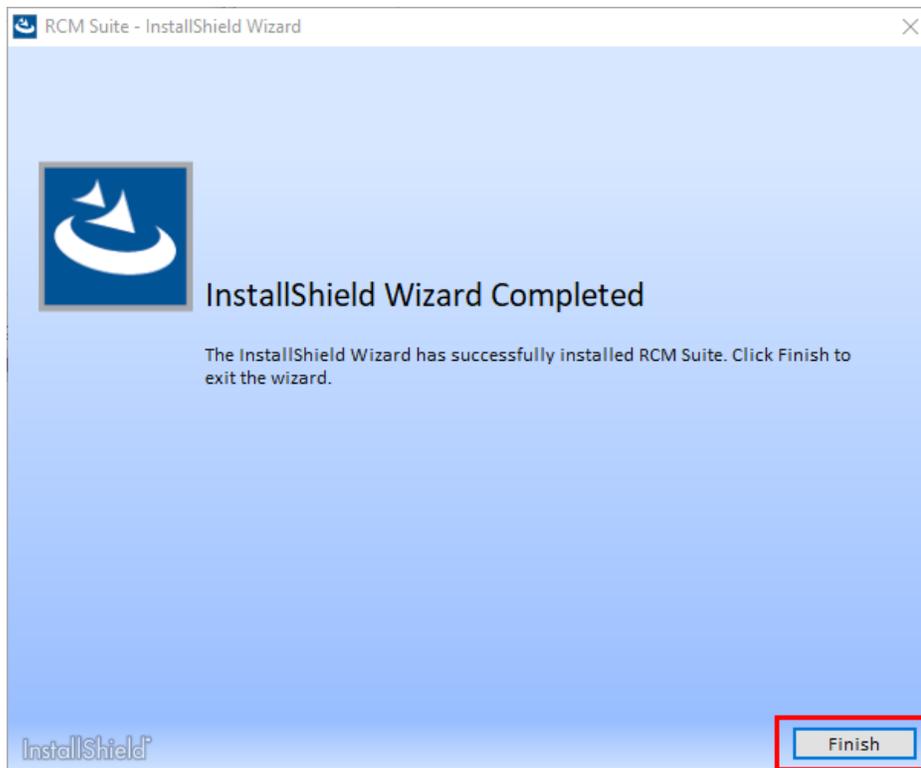
- The installation will now begin and you will see a few different screens appear. The POS device will make some sounds and restart at least one time during this process, and the process may take a few minutes.



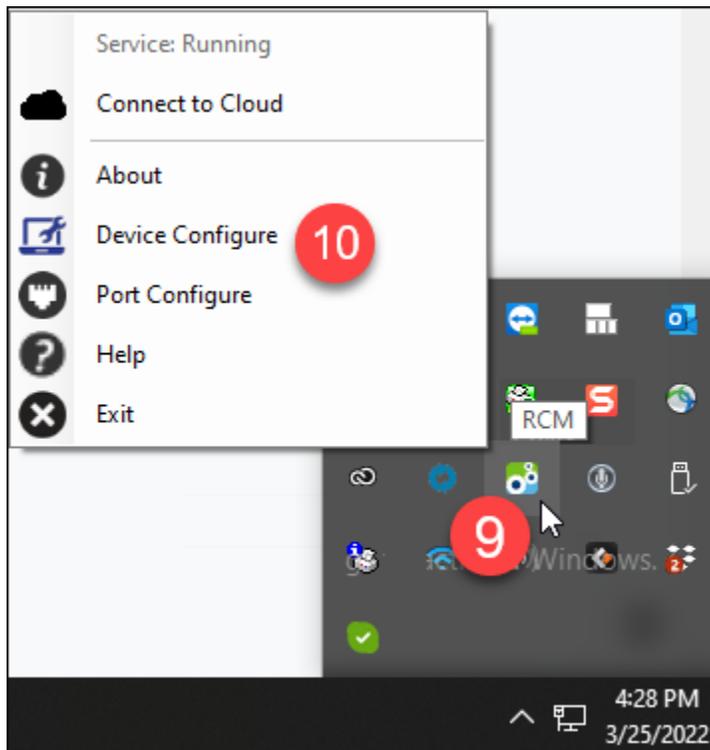
NOTE: If a message appears that says “HARDWARE DEVICE UPDATE HAS FAILED”, make sure the POS device is properly connected to the computer and restart the setup process.



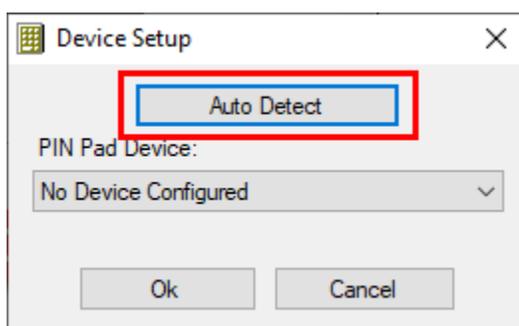
8. When the installation has finished successfully you will see the InstallShield Wizard Completed window. Click **Finish**.



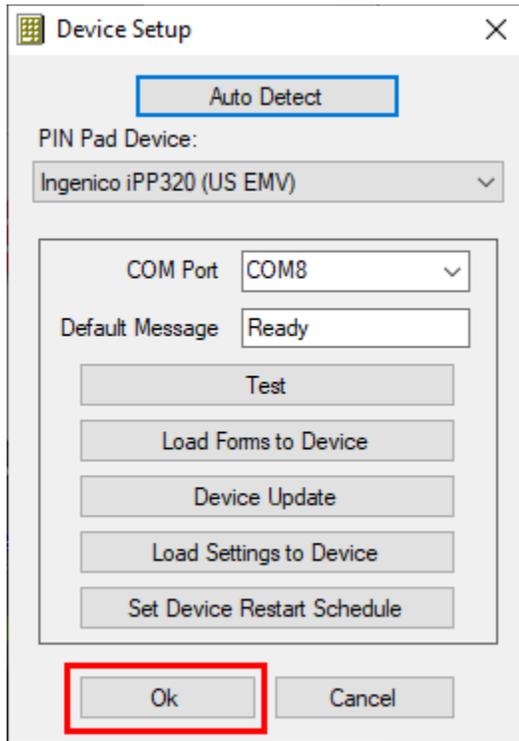
- In the system tray (typically the lower-right corner of your screen), right-click the RCM icon.
- In the menu that appears, click **Device Configure**.



- In the window that opens, click **Auto Detect**.



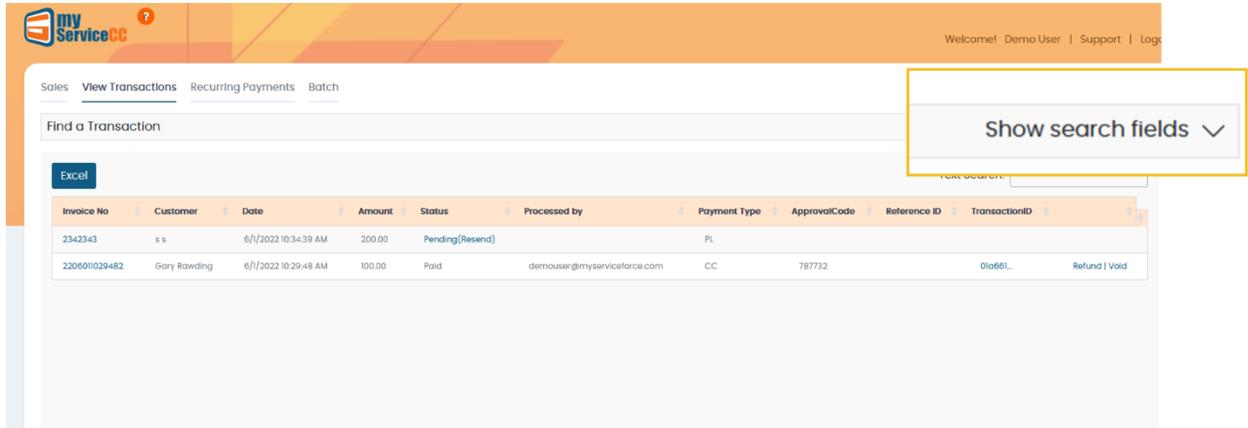
- Within a few seconds, the screen should change and show the settings for your POS device. Finally, click **Ok**.



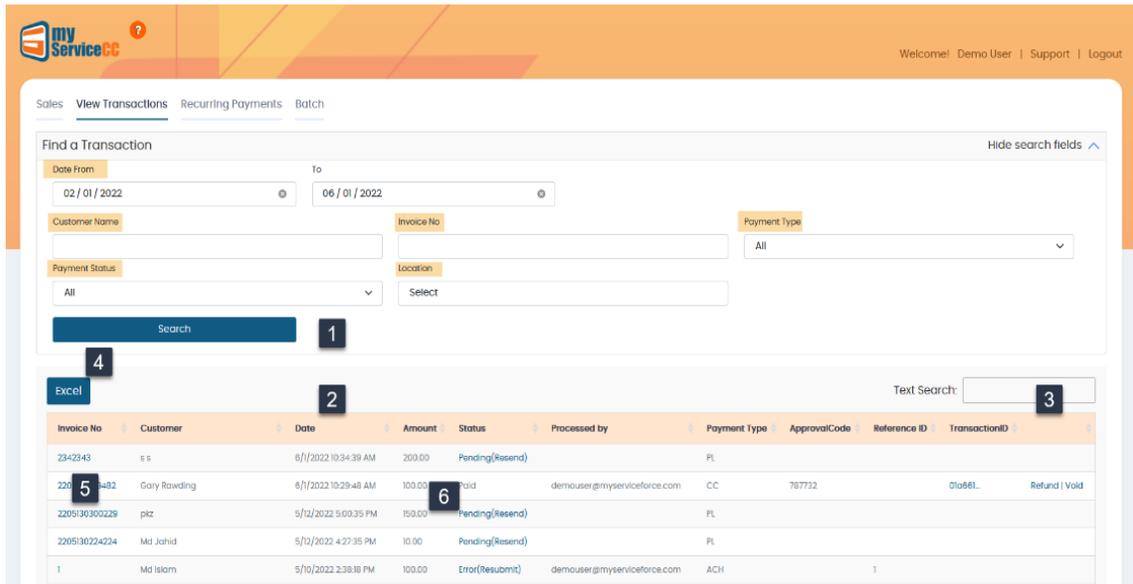
That's it! Your device is ready to begin processing payments.

View Transactions Tab

From this tab you are able to search for transactions and then view, open, perform specific actions, and print or export them. To get started Click the down arrow on Search Fields.



From the Search screen you can:



1. Find transactions by using the fields available.
2. Sort columns by clicking the header.

- Refund or Void a transaction. (Note: Void is used if cancelling the transaction before it has processed in a GPI batch.) Refunds can be partial, by entering the amount to be refunded, or

Refund Transaction

Transaction ID: 853ab3d86bbc4749ae0bbe5ab68d9c4a

Invoice No: 2203220249302

Customer: Gary Rawding

Transaction Amount: 100.00

Refund Amount:

Payment Type: CC

Buttons: Close, Refund

total.

- Export to an Excel file.

Transaction Detail

Demo Company Terminal-1

Invoice No: 2203220249302

Customer: Gary Rawding

Date: 3/22/2022 2:49:30 PM

Amount: \$100.00

Status: Paid

Processed By: demouser@myserviceforce.com

Payment Type: CC

Approval Code: 967906

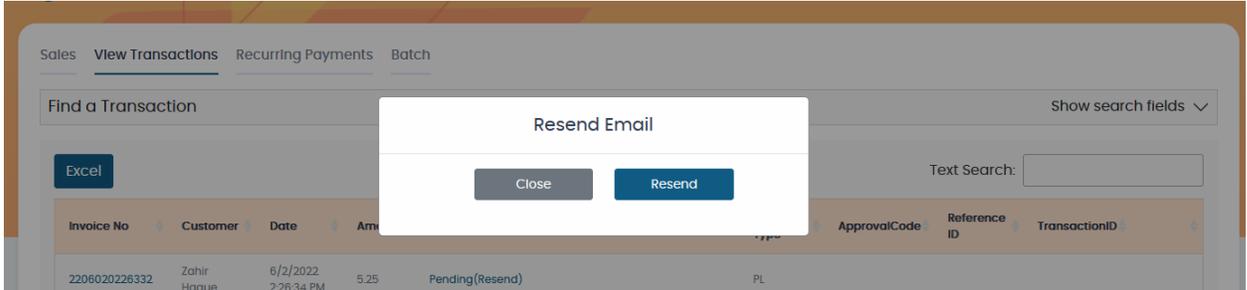
Reference ID:

Transaction ID: 853ab3d86bbc4749ae0bbe5ab68d9c4a

Button: Close

- Open a record.

6. Resend a myPayLink.



Recurring Payments Tab

myServiceCC provides the capability to reuse payment information if added to the Recurring Payments list, i.e., store on file. This includes occasional use, referred to as “Manual” recurring or those that are processed on a regular calendar schedule. Any payment type can be stored. (Note: technically no payment details are stored in our programs, only a “token” that is sent to GPI/OpenEdge to retrieve information when called for.)

In this tab there are three primary functions, Search, Add New recurring transaction, and Process a Manual Transaction. (Note: You can also start the Add New process from the Sales tab after processing a manual transaction and clicking the Make Recurring button.)

Search

The search fields are highlighted and are used to find an individual transaction or perhaps a batch for a given Billing Cycle which is helpful to review upcoming Automatic Recurring charges for any modifications that need to be made.

The screenshot shows the 'Recurring Payments' tab with the following search filters: Billing Cycle (All), Payment Type (All), Recurring Type (All), Customer Name (empty), and Status (Active). There are 'Search' and 'Add New' buttons. Below the filters is an 'Excel' button and a 'Text Search' field. The main table displays the following data:

| Task ID | Customer | Billing Cycle | Payment Type | Amount | #Payments | Start Date | Last Run | Next Run | Type | Status |
|---------------|-----------------|---------------|--------------|---------|------------|------------|------------|------------|-----------|--------|
| 2101201142562 | Gary Rowding | Monthly | CS | 500.00 | Continuous | 2021-03-01 | | 2021-03-01 | Automatic | Active |
| 210120120113 | Gary Rowding | Monthly | CC | 200.00 | Continuous | 2021-01-20 | 2021-01-20 | 2021-02-20 | Automatic | Active |
| 2101201202265 | Mark Hamil | Weekly | CC | 9.98 | 52 | 2021-01-31 | | 2021-01-31 | Automatic | Active |
| 2106240233144 | Zahir Haque | Monthly | CC | 50.25 | 1 | 2021-09-01 | | 2021-09-01 | Automatic | Active |
| 2106280109214 | Ashraf Khan | Weekly | CC | 500.00 | 2 | 2021-08-29 | | 2021-08-29 | Automatic | Active |
| 2106300935097 | Khandakar Momin | Bi-Weekly | CC | 2000.00 | 2 | 2021-08-31 | | 2021-08-31 | Automatic | Active |

This image shows the expanded drop-down menus for the search filters:

- Billing Cycle:** All, Monthly, Bi-Weekly, Weekly, Yearly
- Payment Type:** All, Card Processing, ACH Processing, Customer Statement
- Recurring Type:** All, Automatic, Manual
- Status:** All, Active, Inactive

Search Field Drop Down Options

Like other Search options the columns are sortable and results can be exported to an Excel spreadsheet.

Run a Manual Recurring Payment

Step 1 Search for Manual Recurring transactions

Step 2. Find the desired transaction. Click on the transaction ID to view and make any changes

Step 3 Click Run to process.

The screenshot shows the 'Recurring Payments' section of a software interface. At the top, there are tabs for 'Sales', 'View Transactions', 'Recurring Payments', and 'Batch'. Below these are filters for 'Billing Cycle' (set to 'All'), 'Payment Type' (set to 'All'), and 'Recurring Type' (set to 'Manual'). A 'Customer Name' field is also present. There are 'Search' and 'Add New' buttons. Below the filters is a table with columns: Customer, Billing Cycle, Payment Type, Amount, #Payments, Start Date, Last Run, Next Run, Type, and Status. The first row is highlighted, showing a transaction ID '2109290425594' and a 'Run' button. A yellow box highlights the 'Run' button, and another yellow box highlights the transaction ID.

| Customer | Billing Cycle | Payment Type | Amount | #Payments | Start Date | Last Run | Next Run | Type | Status |
|---------------|---------------|--------------|--------|------------|------------|------------|----------|--------|--------|
| Solo | N/A | CC | 1.00 | 3 | 2021-09-29 | | | Manual | Active |
| Sir Khan | N/A | CC | 0.10 | Continuous | 2021-10-13 | | | Manual | Active |
| Tausir Khan | N/A | CC | 0.00 | Continuous | 2021-11-30 | | | Manual | Active |
| Joe Smith | N/A | CC | 10.00 | Continuous | 2021-09-28 | | | Manual | Active |
| Tausir Khan | N/A | CC | 10.00 | Continuous | 2022-03-31 | | | Manual | Active |
| Zahirul Haque | N/A | CC | 100.00 | Continuous | 2021-10-08 | 2021-10-08 | | Manual | Active |

Add New Recurring Information

Adding a new transaction is a 3-step process. First add Customer Information. Second, the payment details. Third designate as Automatic or Manual and set the schedule if automatic.

Step 1 -After clicking the Add New button simply start by adding the Customer Information including the Payment Type from the drop down, amount to be processed, and click next. (Note: the amount can be \$0.00 to be updated when you process a future transaction.)

The screenshot shows the 'Add New' button highlighted with a black arrow. The interface is the same as the previous screenshot, but the 'Add New' button is the focus. The 'Recurring Type' is set to 'Manual' and the 'Status' is set to 'Active'. The 'Add New' button is located below the 'Customer Name' field.

The screenshot shows the 'myServiceCC' interface with the 'Recurring Payments' tab selected. The 'Customer information' section includes the following fields:

- Merchant ***: A dropdown menu with 'Select' as the current option.
- Name on Card ***: A text input field.
- Email address ***: A text input field.
- Mobile**: A text input field.
- Address**: A text input field.
- City**: A text input field.
- State**: A dropdown menu with 'Choose...' as the current option.
- Zip Code**: A text input field.
- Payment Type**: A dropdown menu with 'Select...' as the current option.
- Reference ID**: A text input field.
- Amount ***: A text input field.
- Description**: A text input field.

A blue 'Next' button is located at the bottom of the form. The footer of the page reads '© 2022 myserviceCC. All Rights Reserved.'

Step 2- Add the payment information.

The payment information will be slightly different based upon the payment type and does not apply to myPayLink as that is added by the customer directly. Here is CC Processing:

The screenshot shows the 'Card information' form with the following fields:

- Card Number**: A text input field with the placeholder 'XXXX XXXX XXXX XXXX'.
- Expiry Date**: Two dropdown menus, one for 'Month' and one for 'Year'.
- CVV**: A text input field with the placeholder 'XXX'.

At the bottom of the form, there are two blue buttons: 'Back' and 'Next'.

Step 3 – Recurring Settings.

First select the Recurring Type, i.e., Manual or Automatic. If Manual then select the current date for starting, N/A (not applicable) for billing cycle, zero (0) for number of payments which means it will be available until made Inactive, and save.

The screenshot shows a form titled "Recurring Settings" with the following fields and callouts:

- 1**: Recurring Type dropdown menu, currently set to "Manual".
- 2**: Start Date text input field, showing a placeholder "mm / dd / yyyy".
- 3**: Billing Cycle (Based on start date) dropdown menu, currently set to "N/A".
- 4**: Number Of Payments text input field, showing the value "0".
- 5**: A "Save" button at the bottom right of the form.

Below the "Number Of Payments" field, there is a note: "Use zero (0) for continuous payments". At the bottom of the form, there are two buttons: "Back" and "Save".

If Automatic, then:

- Select the date for first payment. This will determine when future dates will be made.
- Pick the Billing cycle from the drop down from these choices.



- Select the number of payment cycles with (0) for payments to continue until made Inactive,
- and save.

Batch Tab

In the payment process world transactions are accumulated and send to the corresponding banks in batches, typically of not exclusively twice a day. Payments that are received into your bank account

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are based upon those batches. So, to closely reconcile payments the Batch process details are necessary.

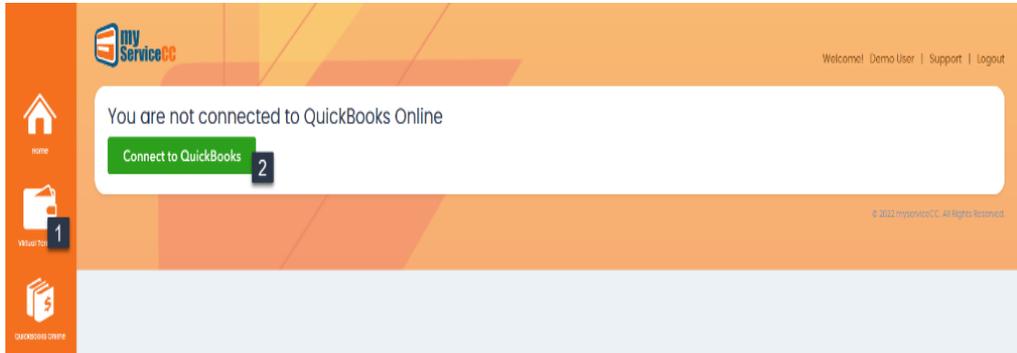
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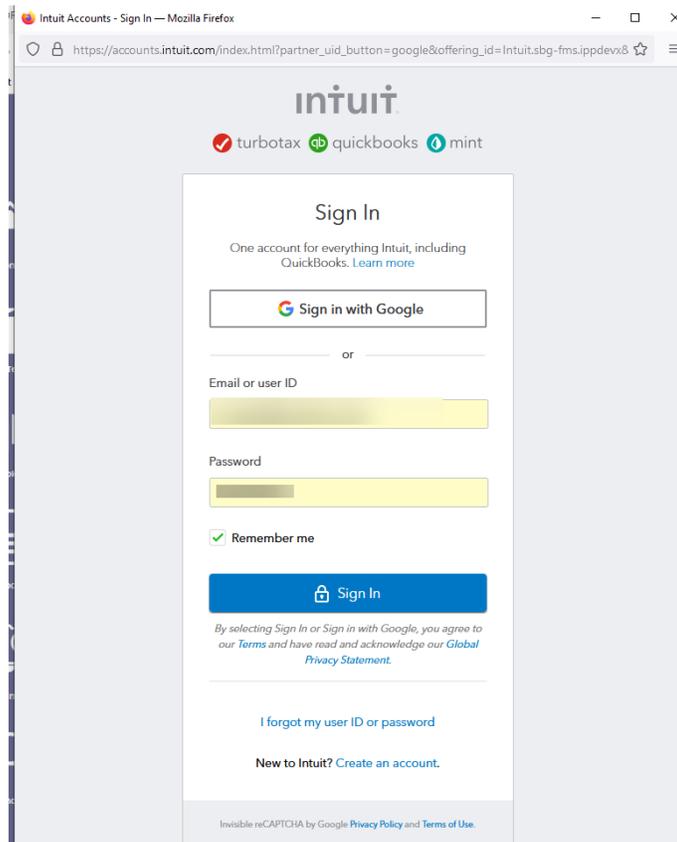
Chapter 3: QuickBooks OnLine

One of the major features of MyServiceCC is the integration with QuickBooks Online. This has many benefits in terms of efficiency and accuracy. This integration also extends to any of the Business Management Software options.

Set up is very simple. When you first click on the QBO icon you will be asked to Connect to your QuickBooks account.



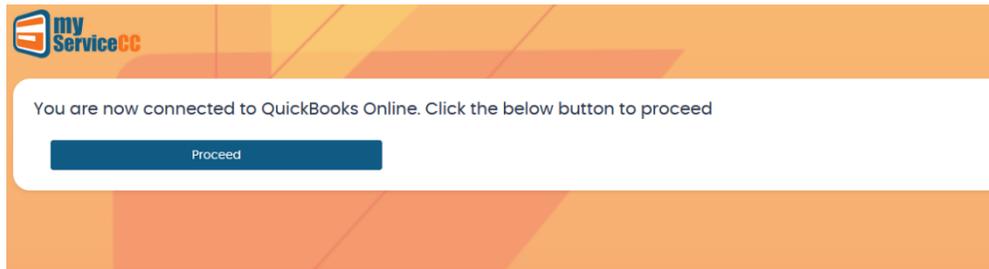
You will be presented with a login screen from Intuit in which you will enter your QBO login details.



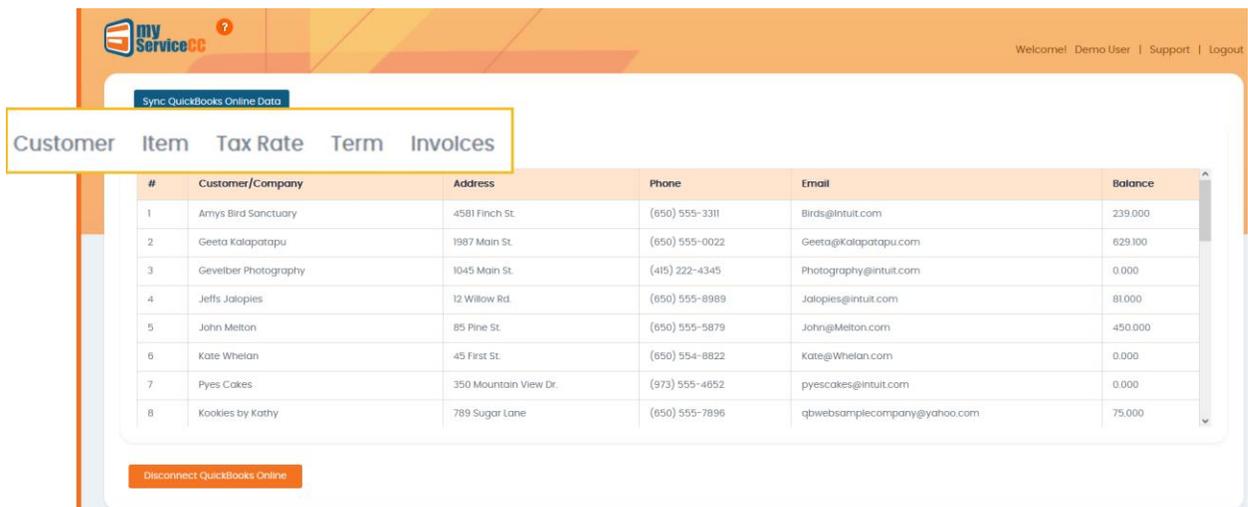
When completed the Intuit process you will be ready to Proceed.

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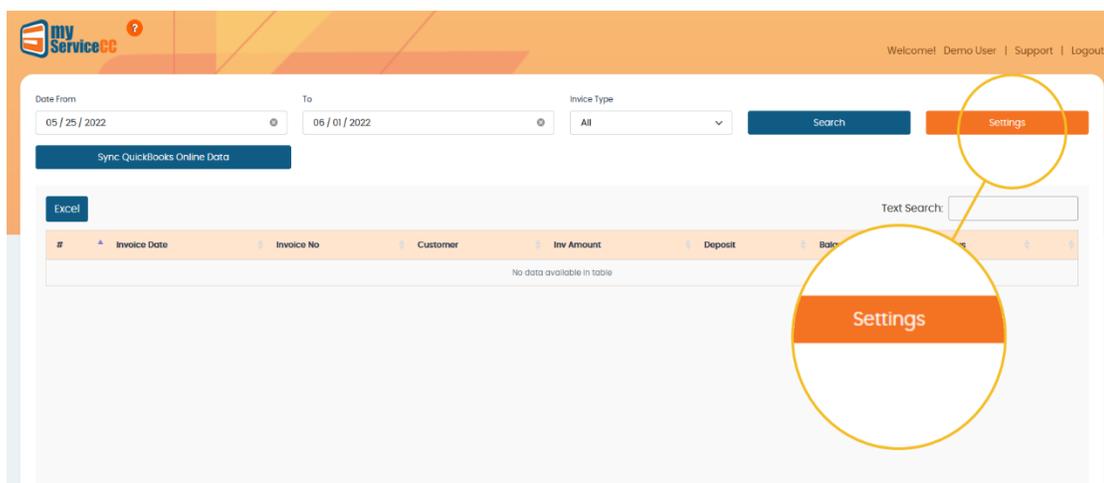
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This brings you to the QBO search screen, when you first connect it will automatically synchronize your data.



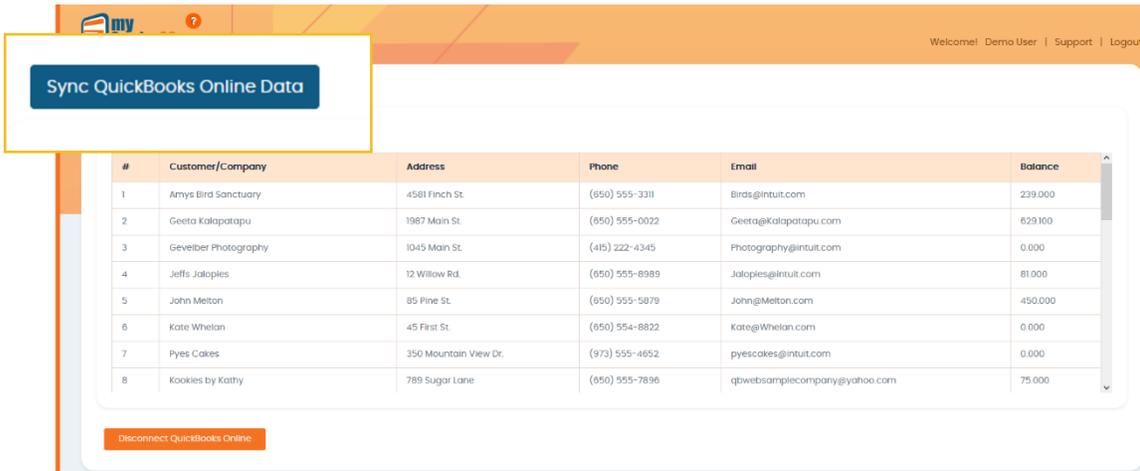
You may need manually synchronize your data from time to time. To do this click on Settings and then the Synchronize tab.



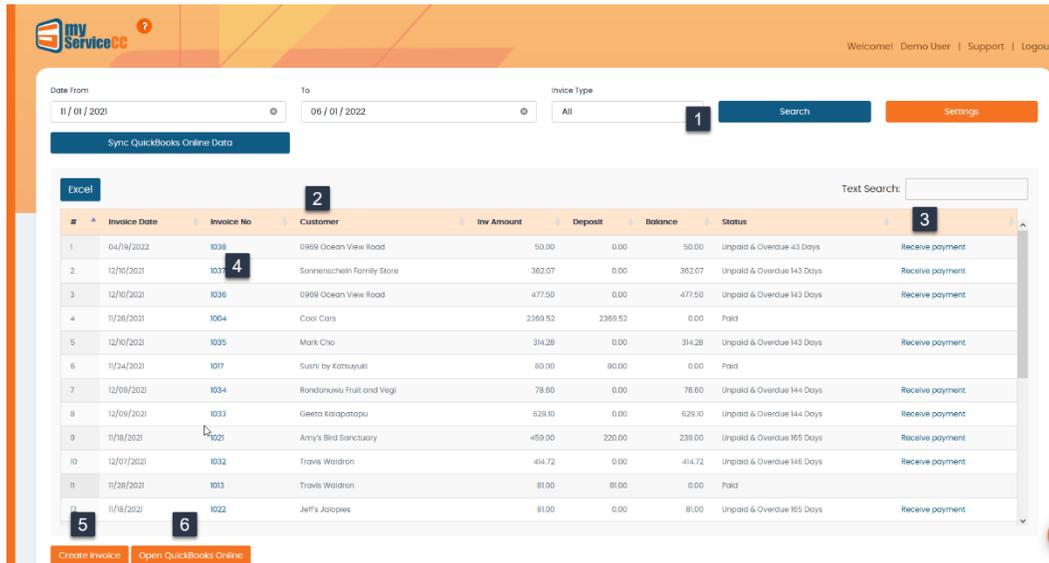
Click on Settings and then click the Sync button. A sample of your data will appear under each of the tabs so you can be assured the data sync has occurred. It's not a bad idea to Disconnect from QBO when you will not be using MyServiceCC for a period of time for security purposes.

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Clicking the QBO Icon in the Side panel or clicking Invoices will return you to the Search screen.



There are 6 functions that can be done from this screen all pertaining to Invoice and Collections.

1. Search by date and invoice type, i.e., Paid or Unpaid.
2. Sort information by clicking a columns header.
3. Receive payment for an unpaid invoice which opens the Virtual Terminal and populates the data fields.
4. Clicking the Invoice field to opens the QBO invoice.
5. Create Invoice button is used to create a new invoice which can then be either be Saved to QBO for future payment or Saved and Submitted to open the Virtual Terminal for collection. (NOTE: The information to create the invoice comes from QBO. With the exception of a new customer any other new items must be added through QBO.) See more below.
6. For convenience a link is provided to open your QBO account.

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Invoices

Invoices have the same general format and fields as QBO invoices. As mentioned above, clicking the Invoice Number of an existing invoice will open it. You can modify it and it will update QBO when you click one of the two Submit option buttons. Creating a New Invoice uses the fields and data from QBO. With the exception of a New Customer all other items are created in QBO. The Connect to QBO button makes that convenient.

The screenshot shows the 'Invoice' creation form in myServiceCC. The interface includes the following elements:

- 1**: Customer dropdown menu (currently showing 'Mark Cho').
- 2**: Invoice Date dropdown menu (currently showing '06 / 01 / 2022').
- 3**: Product/Service dropdown menu in the first row of the table (currently showing 'Rock Fountain').
- 4**: The table containing invoice items with columns for #, Product/Service, Description, Service Date, Qty, Rate, Amount, Tax, and Del.
- 5**: Discount(%) dropdown menu and California tax dropdown menu.
- 6**: Submit, Submit & Pay, and Reset buttons at the bottom.

| # | Product/Service | Description | Service Date | Qty | Rate | Amount | Tax | Del |
|---|-----------------|-----------------|----------------|-----|------|--------|-------------------------------------|-----|
| 1 | Rock Fountain | Rock Fountain | 01 / 01 / 0001 | 1 | 275 | 275 | <input checked="" type="checkbox"/> | Del |
| 2 | Sprinkler Pipes | Sprinkler Pipes | 01 / 01 / 0001 | 4 | 4 | 16 | <input checked="" type="checkbox"/> | Del |
| 3 | Select Item | | mm / dd / yyyy | | | | <input type="checkbox"/> | Del |

Sub Total: 291.00
 Discount(%): 0, 0.00
 California: 8, 23.28

The fields you need to enter or can modify are highlighted above. Steps to complete a new invoice are similar to those in QBO:

1. Select a customer existing in QBO. (Note: The name that is used in myServiceCC is the Display Name in QBO.)



Customer information ×

| | | | | | |
|--|----------------------|----------------------|----------------------|----------------------|---|
| Title | First name | Middle name | Last name | Suffix | Email |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text" value="grawing@xceleran.com"/> |
| Company | | | | | Phone |
| <input type="text"/> | | | | | <input type="text" value="6105063947"/> |
| | | | | | Mobile |
| | | | | | <input type="text"/> |
| | | | | | Fax |
| | | | | | <input type="text"/> |
| | | | | | Other |
| | | | | | <input type="text"/> |
| | | | | | Website |
| | | | | | <input type="text"/> |
| Print on check as <input checked="" type="checkbox"/> Use display name | | | | | <input type="checkbox"/> Is sub-customer |
| Bob Builder | | | | | Enter parent customer <input type="text"/> |
| | | | | | Bill with parent <input type="text"/> |

*** Display name as**

Address Notes Tax info Payment and billing Language Attachments

| | | | |
|--|---|---|---|
| Billing address <small>map</small> | | Shipping address <small>map</small> <input checked="" type="checkbox"/> Same as billing address | |
| <input type="text" value="5 Main St"/> | | <input type="text" value="5 Main St"/> | |
| <input type="text" value="Wayne"/> | <input type="text" value="State/Province"/> | <input type="text" value="Wayne"/> | <input type="text" value="State/Province"/> |
| <input type="text" value="19088"/> | <input type="text" value="Country"/> | <input type="text" value="19088"/> | <input type="text" value="Country"/> |

Privacy

2. Invoice Date default is current day and the Due date is based upon your Terms with the default being Due Upon Receipt.
3. Product and Service field is selected from the drop-down menu. Quantity is required to be entered. Other fields can be modified and will be saved to that invoice but will not change the billable item in QBO for future use. The tax check box default is no tax.
4. A new line item is made available automatically after an entry is made.
5. You can select a Discount by % or amount and if taxable and jurisdiction can be added from the drop-down menu.
6. Complete the Invoice by clicking Submit which saves it in myServiceCC and QBO or Submit and Pay which saves and then opens the Virtual Terminal for selection of payment method. (Note: as shown below, when requesting payment by XPaylink you can attach a copy of the invoice to the email by clicking the check box. You can also add other files from Attach Files.

myServiceCC ? Welcome! Demo

Sales View Transactions Recurring Payments Batch

CC Processing ACH Processing XPayLink POS Processing

Merchant * Demo Company Terminal-1 First name * Sasha Last name * Tillou

Email address * Sporting_goods@intuit.com Mobile (415) 555-9933 Address 370 Easy St. City Middlefield

State Choose... Zip Code 94482 Amount * Invoice Number

Reference ID Email BCC

Attach QBO invoice pdf

Send Reminder Yes

Attach File/s (Max size: 3 MB; Max No. of files: 3)

Browse... No files selected.

Chapter 4: Reports Tab

The reports tab is another way to search and export data.

Chapter 5: Reminders Tab

Reminders can be created and sent automatically to customers that have been sent XPaylinks and have not responded. They are activated from the Send Reminders Check box on the XPayling page. The emails will include a XPaylink and attachments like the original link. The default is checked, i.e., they will send.

The content and timing of the Reminder is created from this tab. Select the Days after the initial XPaylink was sent, customize your message, and Save. (NOTE: Fields from the data base in [] brackets will be customized to the data. A list of the fields is in Appendix A.

Chapter 6: User Management

Users are added and their roles defined here. There are three standard classes of users:

- **Payment Processor** - They can see everything and create payments via manual entry in CC, ACH, myPaylinks, POS. They do not have access to QBO.
- **Bookkeeper** – The have the same rights as a Payment Processor plus the ability to access QBO functions.
- **Administrator** – All the above plus User Management.

Appendix A – myPayLink Customization

With XPayLink your customers will receive an SMS (text) message and/or email with a link where they can go to make their payment on-line. By default, the page will contain the basic information about the payment and your company name like in the example below.

The screenshot shows a payment statement interface. At the top, it says "Statement - Your Business, Inc." in a blue header. Below that, it displays "Statement Date: 03/28/2022" and "Total Balance: \$10.00". A large white box in the center shows "Amount to Pay: \$10.00". Below this is a "New Card" payment form with fields for "Card Number", "Expiration", and "CVV", and a "PAY NOW" button. At the bottom, it says "Thank you for your business" and "Your Business, Inc.".

It is best to customize this “on-line statement” to match your company branding to provide your customers with the best possible customer experience. To customize your on-line statement, simply provide us the following:

1. Your company logo (or other graphic) for the header/top of the statement.
2. A logo or graphic for the bottom/footer of the statement.
3. Your choice of banner/button color from the list below.

| | | |
|-----------------------|-----------------------|-----------------------|
| cyan - #00bcd4 | orange - #ff9800 | purple - #9c27b0 |
| teal - #009688 | brown - #795548 | deep purple - #673ab7 |
| green - #4caf50 | blue grey - #607d8b | blue - #2196f3 |
| light green - #8bc34a | grey - #9e9e9e | light blue - #03a9f4 |
| lime - #cddc39 | deep orange - #ff5722 | indigo - #3f51b5 |
| amber - #ffc107 | red - #f44336 | pink - #e91e63 |

[myServiceForce YouTube](#)

[Chat w/ Support](#)