Payments by Credit Card in MTS

The Member Tracking System can process credit cards for members' payments right inside the program! You will have the ability to:

- Add a Payment with a Credit card Payment
- View the transaction on the Web Merchant Portal
- Void a Payment

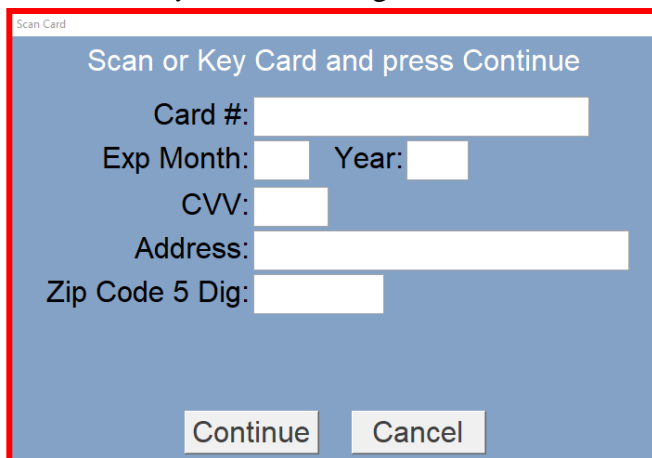Follow this link to sign up with Max Giving for credit card processing:
https://www.maxgiving.com/visioncps/

Setup MTS to process credit cards

1. In Member Tracking System, click the Local/Station Settings button.
2. Click the Local Settings 2 tab.
3. Click the hyperlink on the screen to activate an account with Max Giving.
4. Once you have an account with our partner Max Giving, you will come back to this screen and in the Credit Card Processing section click Yes next to 'Use Max Giving for Credit Card Processing at this organization'.
5. At the CC Processing message, click OK.
6. Close the Local/Station Settings screen.
7. From Main Menu, click Unit Information.
8. Click the Credit Card Config tab.
9. Click the Retrieve/Refresh Settings button at the bottom and the following items should populate:
    a. MerchantID
    b. UserID
    c. PIN
10. Set 'Use Max Giving for Credit Card Processing at this Unit' to Yes.
11. *This step must occur for each Unit.*
12. Close the Unit Information screen.
13. Click the Organization Information/Standards button.
14. Type in your name and click I Understand.
15. Click the Accounts/MOP tab.
16. Turn on the checkbox in the 'For CC Processing' column for all Method of Payments that are credit cards (some organizations have more than one type or list Visa, MC, Amex as separate types).
17. *This step will only occur once.*
18. Close the Organization Information/Standards screen and your setup is complete.

Add a Payment with a Credit card Payment
1. Click on Members
2. Find the desired member
3. Click on the Charges / Payment tab
4. Add a charge
5. Click on Quick Pay this Charge (Single Payment).
6. Fill in the Payment Amount.
7. Choose the MOP and fill in a Payment Comment if needed.
8. Click Apply Charge and Payment and answer Yes to the *Are you sure* message.
9. Type in or swipe your credit card into this ➔ screen
10. Click Continue. NOTE: Card #, Exp Month and Year, CVV and Zip Code are required. Your charge and payment will be recorded in the Member Tracking System and the credit card will be processed.
11. The hourglass will appear as the transaction is processed.
12. OR
13. Click Apply Charge (Pay Later) then use the Add Payment button
14. Click Yes to confirm the Charge
15. Click Add Payment
16. Type in the Payment Amount
17. Select a credit card MOP
18. Click on Create and Process Payment
19. Type in or swipe your credit card into the Scan Card screen
20. Click Continue
21. The hourglass will appear as the credit card transaction is processed.
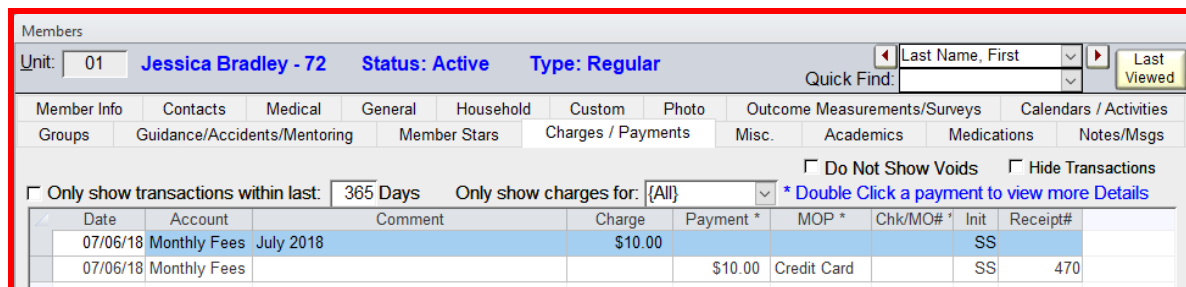
Scan Card

Scan or Key Card and press Continue

Card #: _____

Exp Month: ____ Year: ____

CVV: ____

Address: _____

Zip Code 5 Dig: _____

Continue   Cancel

Members

Unit: 01   Jessica Bradley - 72   Status: Active   Type: Regular   ◄ Last Name, First ► Last Viewed
Quick Find: _____

| Member Info | Contacts | Medical | General | Household | Custom | Photo | Outcome Measurements/Surveys | Calendars / Activities |
| Groups | Guidance/Accidents/Mentoring | Member Stars | Charges / Payments | Misc. | Academics | Medications | Notes/Msgs |

□ Do Not Show Voids   □ Hide Transactions

□ Only show transactions within last: 365 Days   Only show charges for: {All} ▼   * Double Click a payment to view more Details

Date	Account	Comment	Charge	Payment *	MOP *	Chk/MO# *	Init	Receipt#
07/06/18	Monthly Fees	July 2018	$10.00				SS	
07/06/18	Monthly Fees			$10.00	Credit Card		SS	470

View the transaction on the Web Merchant Portal
1. Open a browser and visit https://www.myvirtualmerchant.com/VirtualMerchant/login.do
2. Login using your account credentials that were provided by MAX Giving:
   a. AccountID
   b. UserID
   c. Password
3. Click on Current Batches.
4. Click on Main.
5. You will see the transaction you just created in MTS.

Void a Payment:

1. In Member Tracking click on the payment you want to Void.
2. Click on Void Payment button at the bottom of the screen.
3. Review the Void Comment carefully. →

Credit Card Transaction ✕

This Payment was processed by the credit card processing company through the Member Tracking System.

Would you also like to void the actual Credit Card transaction (returning money to the payer)?

Note that if you do NOT void the Credit Card transaction, then the system will create a new Member Tracking System transaction with the criteria you provide.
You are not allowed to void only the Member Tracking System payment while keeping the credit card transaction.

Yes = Void CC Payment + Void Member Tracking System Payment
No = Keep CC Payment + Void/Recreate Member Tracking System Payment
Cancel = Cancel Void

[Yes]   [No]   [Cancel]

4. Click Yes if you are also returning money to the payer
5. Fill in a Void Comment and click Void Payment

Void a Payment

Void Payment for: **Jessica Bradley - 72**
Payment Date: **07/06/2018**
Amount: **$10.00**
MOP: **Credit Card**
Check Number:
Void Comment: Void (7/6/18) of: 7/6/2018 payment

A Void Comment is highly recommended for historical information and so other users will know why the void occured

[Void Payment]   [Cancel]

Members

Unit: 01   **Jessica Bradley - 72**   **Status: Active**   **Type: Regular**
Last Name, First   Last Viewed
Quick Find:

Member Info | Contacts | Medical | General | Household | Custom | Photo | Outcome Measurements/Surveys | Calendars / Activities
Groups | Guidance/Accidents/Mentoring | Member Stars | Charges / Payments | Misc. | Academics | Medications | Notes/Msgs

☐ Do Not Show Voids   ☐ Hide Transactions
☐ Only show transactions within last: 365 Days   Only show charges for: {All}   * Double Click a payment to view more Details

Date	Account	Comment	Charge	Payment *	MOP *	Chk/MO# *	Init	Receipt#
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07/06/18		VOIDED 7/6/2018		$10.00	Credit Card		SS	470
07/06/18		Void (7/6/18) of: 7/6/2018 payment		($10.00)	Credit Card		SS	

6. Click No if you are correcting the Member the payment was applied to or the MOP or Original Payment Date
7. Fill in the form and click Void Payment

Void a Member Tracking System Payment

Void Payment for: **Jessica Bradley - 72**
You may Void a Member Tracking System Payment without also Voiding the underlying credit card transaction only to correct a problem with the Member Tracking System payment.
Provide the new information below.
You may optionally add a new Comment (recommended) and/or change the Check Number value.

The system will then Void the original Member Tracking System Payment, and will add a new one with the below information..

Actual CC Processing Date: **7/6/2018 7:05:08 PM**   CC Approval Code: **966386**

Current Member Tracking System Payment Info: Change Member Tracking System Payment Info to:
Orig Mbr tied to Payment: **Jessica Bradley - 72**   New Member:
Original Payment Date: **07/06/2018**   New Payment Date:
Original MOP: **Credit Card**   New MOP:
Amount: **$10.00**
Check Number: New Check Number:
Void Comment: Void (7/6/18) of: 7/6/2018 payment

A Void Comment is highly recommended for historical information and so other users will know why the void occured

New Payment Comment:

[Void Payment]   [Cancel]

Refund a Payment:
Payments can be refunded only after the transaction has been settled with the credit card processing company.

1. Click on the payment you want to Refund.
2. Click the Refund Payment button
3. Modify the Refund Date and Amount if needed
4. Choose the Refund MOP
5. Expand on the Refund Comment if needed
6. Determine how to handle the Charge – it can be left as is if another MOP is to be used or it can be voided.
7. Click the Refund Payment (via CC Processing + MTS) button

8. Click Yes at this message