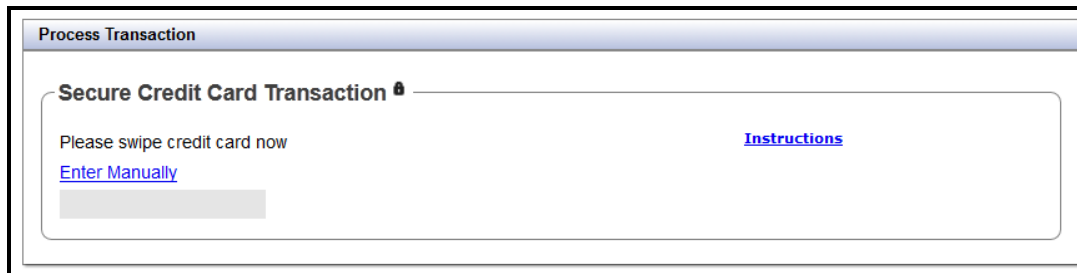


Office Ally now offers Credit Card and eCheck processing. Streamline your operations with great rates from Revenue Maximize. Simply contact **AxiaMed** at **(855) 376-2942 ext. 633** for a statement analysis and quote. Make sure to mention that you're an Office Ally user.

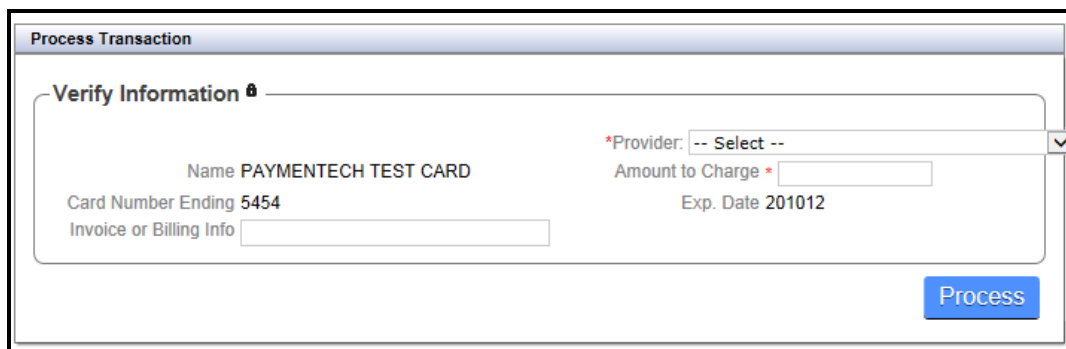
CREDIT CARD PROCESSING

1. Log in to www.officeally.com.
2. In the **Service Center**, click the **Process Credit Card Transaction** link.
3. If you are a merchant account member, you will get the option to swipe the credit card or manually enter the credit card information for the transaction.



The screenshot shows a web interface titled "Process Transaction". Inside, there is a section for "Secure Credit Card Transaction" with a lock icon. Below this, it says "Please swipe credit card now" and has a link for "Enter Manually". There is also a link for "Instructions".

4. If you choose to swipe the credit card, the following information will display:
 - Cardholder Name
 - Last 4 digits of Card Number
 - Expiration Date
5. If you have multiple merchant accounts for your practice, you will see a drop down list to select the correct merchant to apply the payment to.
6. Once you select the **Provider**, enter the **Amount to Charge** and the **Invoice or Billing Info** (if applicable).



The screenshot shows the "Verify Information" section of the "Process Transaction" window. It contains several fields: "Name PAYMENTECH TEST CARD", "Card Number Ending 5454", "Invoice or Billing Info" (with an input field), "*Provider: -- Select --" (with a dropdown arrow), "Amount to Charge *" (with an input field), and "Exp. Date 201012". A blue "Process" button is located at the bottom right.

7. Click **Process**.

8. If you choose to enter the credit card information manually, all fields with an *Asterisk are required.

The screenshot shows a web form titled "Process Transaction" with a sub-section "Secure Credit Card Transaction". The form contains several input fields: "Name *", "Address *", "City *", "Zip Code *", "Card * Number", "Expires *" (with a dropdown menu set to "January" and a year selector set to "2015"), "Amount: *", and "Comments:". There is also a "CCV *" field. To the right of the form are logos for VISA, MasterCard, DISCOVER, and American Express. A blue button labeled "Verify Information" is located at the bottom right of the form area.

9. If you have multiple merchant accounts for your practice, you will see a drop down list to select the correct merchant to apply the payment to.
10. Click **Verify Information**. This will allow you to verify that all the information entered is correct.

The screenshot shows the "Process Transaction" window in the "Verify Information" state. The form displays the entered information: Name JOHN SMITH, Address 1234 MAIN STREET, City VANCOUVER, Zip Code 98687, Card Number Ending 5555, CCV 555, Exp. Date 201811, and Amount \$50.00. There are two blue buttons at the bottom: "Edit Information" and "Process".

11. If you need to make a change, click **Edit Information**.
12. Regardless if you swiped the card or entered the card information manually, you can now proceed to the next step and process the payment.
13. After you click **Process**, a confirmation screen will appear.

The screenshot shows a small dialog box with a light gray background. It contains the text "Transaction has been processed successfully. Approved for \$50.00" and a blue "OK" button at the bottom center.

14. If the card could not be processed, a message will appear in the **Verify Information** screen letting you know what the issue was.

E-CHECK PROCESSING

1. Log in to www.officeally.com.
2. In the **Service Center**, click the **Process eCheck Transaction** link.
3. All fields with an **Asterisk* are required.

The screenshot shows a web form titled "Process Transaction" with a sub-section "Secure eCheck Transaction". The form contains several input fields: "Name", "Address", "City", "Zip Code", "Account Number", "Routing Number", "State" (a dropdown menu), "Amount", and "Comments". Each field has an asterisk next to it, indicating it is required. A blue button labeled "Verify Information" is located at the bottom right of the form.

4. If you have multiple merchant accounts for your practice, you will see a drop down list to select the correct merchant to apply the payment to.
5. Click **Verify Information**. This will allow you to verify that all the information entered is correct.

The screenshot shows the "Verify Information" screen within the "Process Transaction" window. It displays the entered information in two columns: Name JOHN SMITH, Address 1234 MAIN STREET, City VANCOUVER, Zip Code 98687, Comments, Checking Account 123456789, Routing Number 6789, Ending, State WA, and Amount \$50.00. At the bottom, there are two blue buttons: "Edit Information" and "Process".

6. If you need to make a change, click **Edit Information**.
7. After you click **Process**, a confirmation screen will appear.

The screenshot shows a simple confirmation message box with a light gray background. The text inside reads "Transaction has been processed successfully. Approved for \$50.00". At the bottom center, there is a small blue button labeled "OK".

VIEWING PAST CREDIT CARD AND E-CHECK TRANSACTIONS

Within Office Ally, you have the ability to view the last 100 Credit Card and eCheck transactions. You will be taken to this section automatically after each successful transaction. To access this section without processing a payment first, you can click the **Process Credit Card Transaction** or **Process eCheck Transaction** link and you will see a link to the **Last 100 Transactions**.

PRINTING A RECEIPT

1. From the **Credit Card Transactions List** (Last 100 Transactions), click on the **Printer Icon** in the Receipt column.

Date	Name	Amount	Auth.No	Comments	Trans.Type	Provider	Type	Receipt	Void / Refund
08/28/2015		\$50.00	1025891		Purchase		eCheck		
08/28/2015		\$50.00	123456		Purchase		Credit Card		

2. A second window will open with a copy of the receipt. From here, you can print.

RECEIPT

Transaction ID: 4855785
Transaction Date: 08/28/2015

Received from: _____ \$ 50.00

For: _____

Method: Cash Check Credit Card Other

Received By: _____

VOIDS AND REFUNDS

1. From the **Credit Card Transactions List** (Last 100 Transactions), click on the **Void/Refund Icon** next to the transaction that you would like to void or refund. **NOTE:** a payment will be voided if the payment has not been completely processed by the bank. If the payment has been completely processed by the bank, the payment will be refunded.

Process Transaction

Verify void information

Provider: _____

Transaction Date: 8/28/2015 12:26:06 PM

Name: Test

Card Number Ending: 1111

Amount: \$50.00

Comments: VOID

2. Enter a comment (if applicable) and then click **Process**. A confirmation screen will appear once the void/refund is processed.