CREDIT CARD & E-CHECK TRANSACTIONS

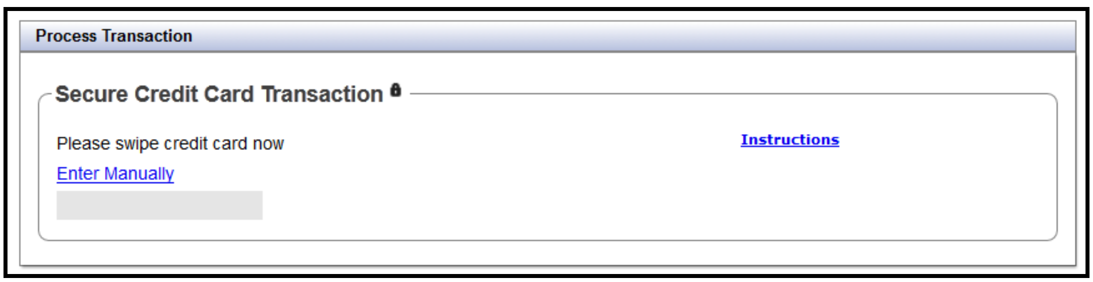
Office Ally now offers Credit Card and eCheck processing. Streamline your operations with great rates from Revenue Maximize. Simply contact **AxiaMed** at **(855) 376-2942 ext. 633** for a statement analysis and quote. Make sure to mention that you're an Office Ally user.

CREDIT CARD PROCESSING

1. Log in to www.officeally.com.

2. In the **Service Center**, click the **Process Credit Card Transaction** link.

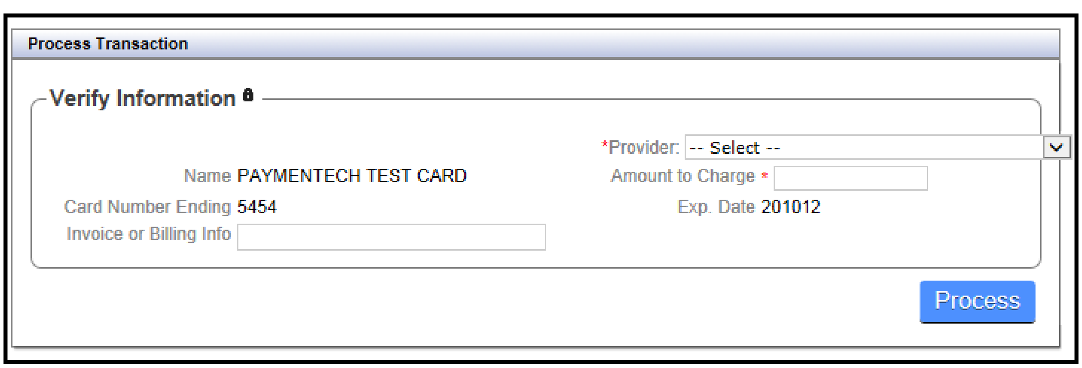
3. If you are a merchant account member, you will get the option to swipe the credit card or manually enter the credit card information for the transaction.



4. If you choose to swipe the credit card, the following information will display:
   - Cardholder Name
   - Last 4 digits of Card Number
   - Expiration Date

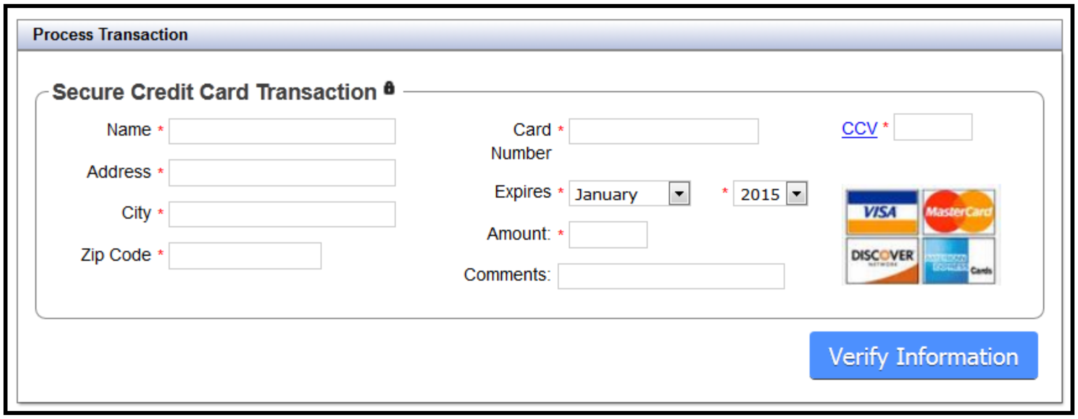
5. If you have multiple merchant accounts for your practice, you will see a drop down list to select the correct merchant to apply the payment to.

6. Once you select the **Provider**, enter the **Amount to Charge** and the **Invoice or Billing Info** (if applicable).



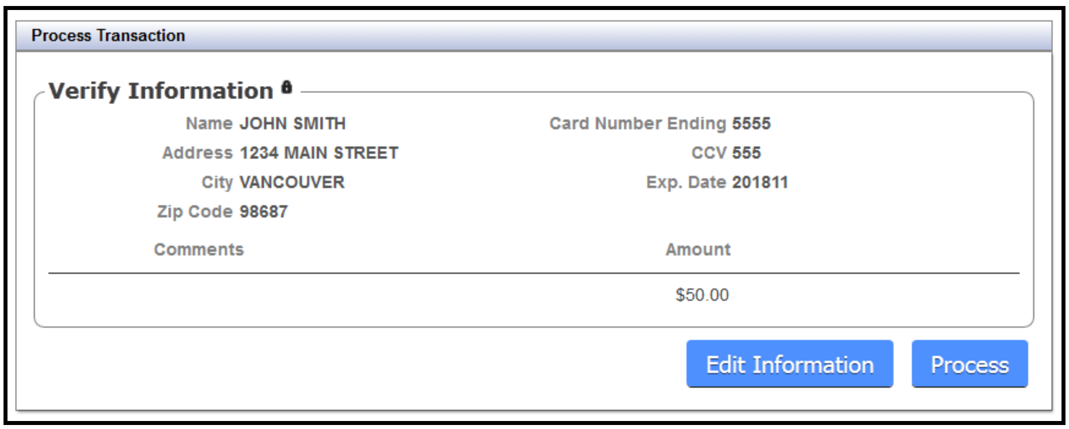
7. Click **Process**.

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



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.

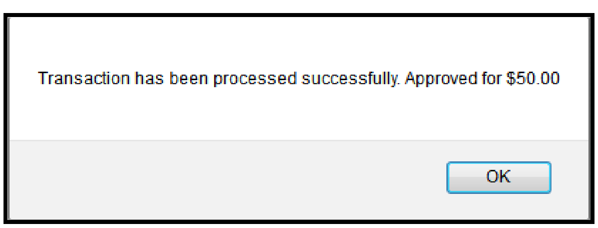
10. Click **Verify Information**. This will allow you to verify that all the information entered is correct.



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.



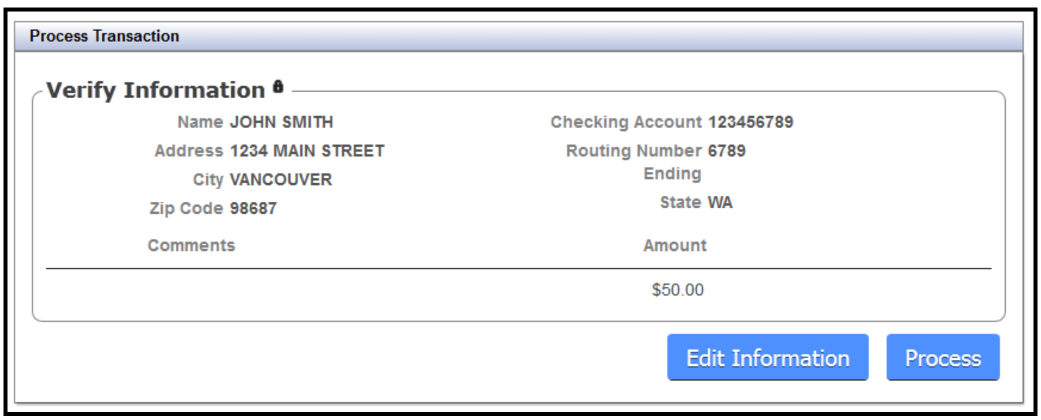
14. If the card could not be processed, a message will appear in the **Verify Information** screen letting you know what the issue was.

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.

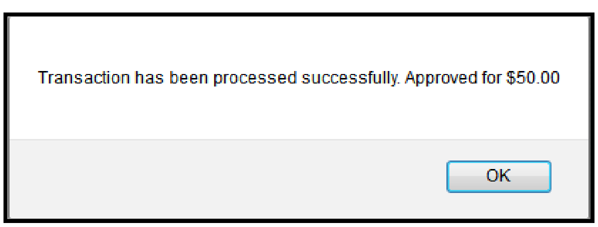
4. If you have multiple merchant accounts for your practice, you will see a drop down list to select the correct merchant to apply the payment to.

5. Click **Verify Information**. This will allow you to verify that all the information entered is correct.



6. If you need to make a change, click **Edit Information.**

7. After you click **Process**, a confirmation screen will appear.

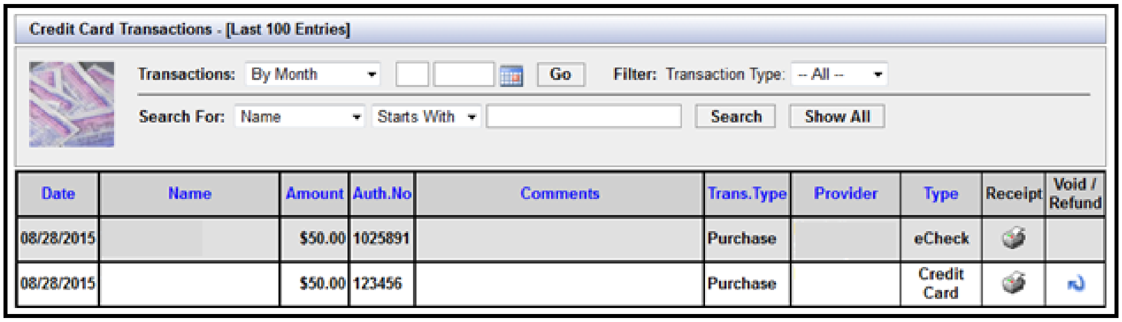


VIEWING PAST CREDIT CARD AND E-CHECK TRANSACTIONS

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**.

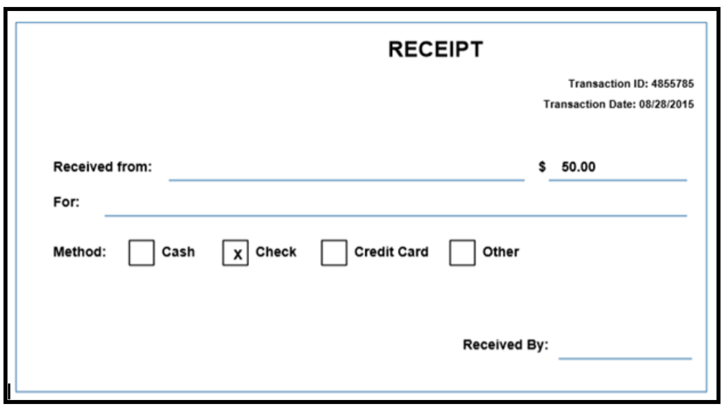
PRINTING A RECEIPT

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

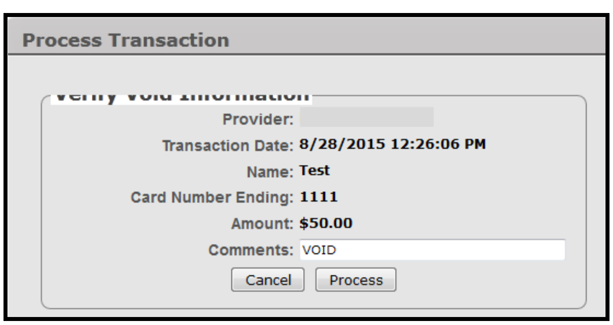
For:

Method: Cash [x] 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

Provider:
Transaction Date: 8/28/2015 12:26:06 PM
Name: Test
Card Number Ending: 1111
Amount: $50.00
Comments: VOID
Cancel Process

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