

Adding a Credit Card Without Charging

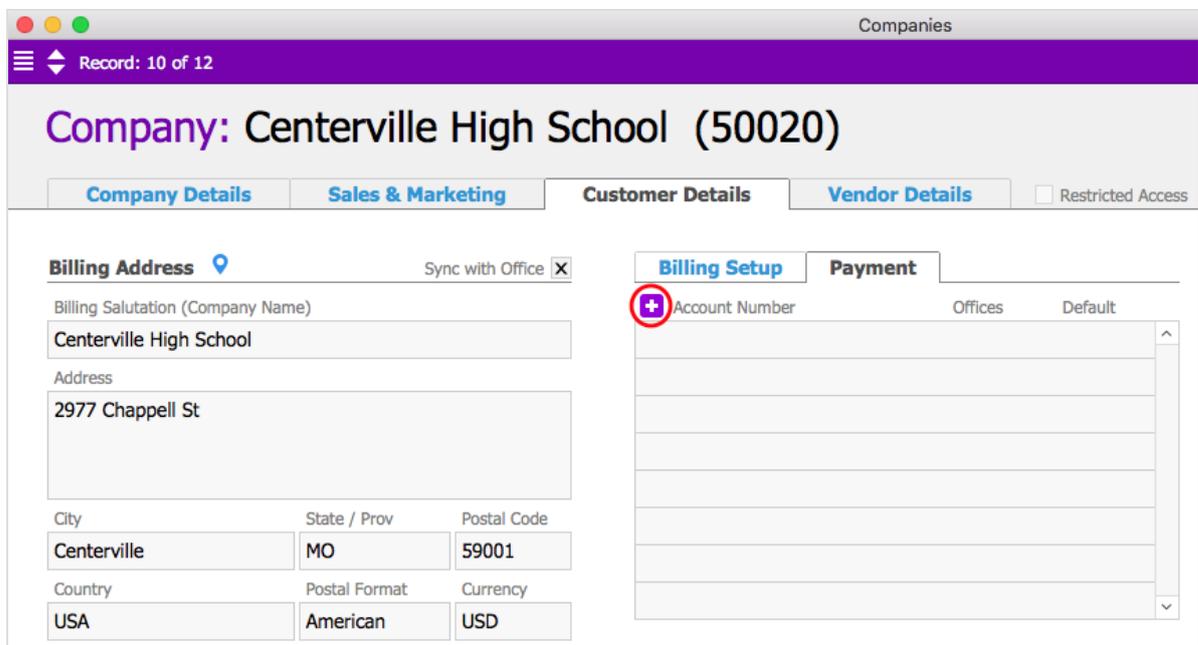
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aACE allows you to manually input a credit card for verification without charging the card. You can do this in various modules:

- From the Orders, Receipts, or Recurring Transactions modules: set the Payment Method to Credit Card; in the Payment Info section, click the Plus () icon to open the Charge Card screen and follow steps 6-8 below.
- From the Companies module, follow the steps below.

Verify and Initialize a Credit Card

1. Navigate to **CRM & Sales > Companies**.
2. At the list view, click the desired company record.
3. At the detail view, click the **Customer Details** tab.
4. Click the **Payment** tab.
5. Click the Plus () icon.



Companies

Record: 10 of 12

Company: Centerville High School (50020)

Company Details Sales & Marketing Customer Details Vendor Details Restricted Access

Billing Address  Sync with Office

Billing Salutation (Company Name)
Centerville High School

Address
2977 Chappell St

City State / Prov Postal Code
Centerville MO 59001

Country Postal Format Currency
USA American USD

Billing Setup **Payment**

 Account Number	Offices	Default

6. At the **Generate Alias** dialog box, enter the Card Number, Expiry Date, CVV number, account holder name, and billing address.

Generate Alias

Total Amount (\$):
\$0.00

Card Number:*

Expiry Date:*

MM/YYYY

CVV: ?

First Name:

Last Name:

Street:
80 David Street

City:
North River

State or Prov:
NJ

Postal Code:
08882

Make Payment

Cancel OK

7. Scroll down and click **Make Payment**.

The payment processor starts a transaction for \$0.00. Once the card is verified, the payment processor returns an alias for the credit card.

8. Click **OK**.

After the alias is stored in aACE, you can easily use that card in subsequent transactions by selecting it from the credit card drop-down list.

