Sedona-X Mobile: How do I add a new payment method?

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To add a new payment method to Sedona-X, the first step to being able to do so is to make sure the techs are given the permission to do so from their Company User setup in the API.

Navigate to the API website where the techs are setup and open a technician who does not appear to have the ability to add a new payment method.

Go to Edit User.

In the Edit User window, scroll down to where there are several options with selectable boxes.

Mark the box next to option labeled as Add Payment Method.

Click Submit button located in top, right of the Edit User window to save the change.

If Add Payment Method is not engaged, then when a tech goes to resolve a ticket and goes to Select Payment, and the Payment Selection window opens, you will only see the field labeled Payments and Cancel and Ok.

When Add Payment Methods is engaged, Ithe Payment Selection window will include the ability to Add Credit Card and Add ECheck.

To add a new payment method from a Service Ticket

Go to Resolve Ticket > Select Payment.

In the Payment Selection screen click on the payment type you are looking to add.

If you need to add a new Credit Card, click Add Credit Card, wait for the Payment Method window to open, and then manually type in the Credit Card Number and Expiration Date. When the information is entered correctly then click Next.

On the Next page, enter in the customer’s full name and address information, then save.

The Payment Selection window will appear and then you can use the payment method.

If you need to add a bank account, click on Add eCheck button.

Enter Routing number and Account number, then re-enter the account number and confirm the account type.

Save by clicking next.

On the Next page, enter in the customer’s full name and address information, then save.

The Payment Selection window will appear and then you can use the payment method.

To add new payment methods directly from a customer

Go to the hamburger menu or three-line menu in the top left of the welcome screen window.

When the menu is opened, choose Customers.

A new window will open. You can scroll through the customers in the list, search from the Search field, or filter by Customer Name or Customer Number.

When a customer is chosen, a new window will open showing the customer.

Choose option labeled as Take a Payment.

When Take a Payment is selected, an invoice is required, as is the Description.

Once an invoice is chosen and something is entered into the description, click Next at the bottom of the screen.

The next window is Payment Info.

You can choose to add a new Credit Card or eCheck by using the selectable options at the top of the screen.

To add a new method, use the plus (+) sign next to the payment option window.

Using the plus sign to add a new payment option will open the Payment Method window.

If you need to add a new Credit Card, click the Credit Card option then the plus sign, wait for the Payment Method window to open, and then manually type in the Credit Card Number and Expiration Date. When the information is entered correctly then click Next.

On the Next page, enter in the customer’s full name and address information, then save.

The Payment Selection window will appear and then you can use the payment method.

If you need to add a bank account, open the eCheck option then use the plus sign. Wait for the Payment Method window to opwn.

Enter Routing number and Account number, then re-enter the account number and confirm the account type.

Save by clicking next.

On the Next page, enter in the customer's full name and address information, then save.

The Payment Selection window will appear and then you can use the payment method.

The new payment method will be added and you can cancel out of making any payments by backing out of the Payment info and customer.