

Common Issue: Cannot Use Card Readers to Add New Card Payment from Service Ticket in Sedona-X

09/16/2024 6:04 pm EDT

Issue:

Technician is trying to add new credit card as a payment method to a customer from the Make a Payment screen using a card reader. Doing so produces an error and they cannot add the new credit card.

Resolution:

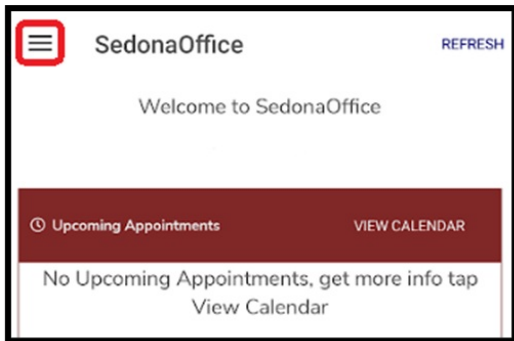
At this time, when technicians are trying to add a new payment method while resolving a ticket, they cannot due to the card reader not being recognized in the Payment Selection.

This can be reproduced in a service ticket by going Resolve Ticket > Select Payment > Add Credit Card and attempting to use the card reader to bring in the new Credit Card details. This produces an error and will not add the card details.

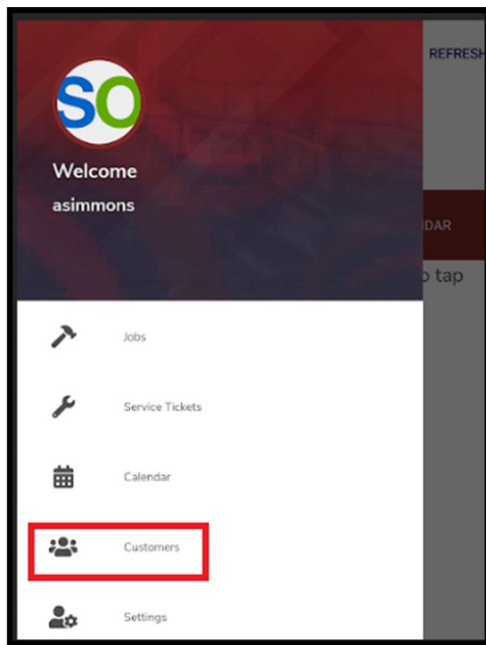
The card will first need to be added to the customer directly.

To add the new credit card to the customer:

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



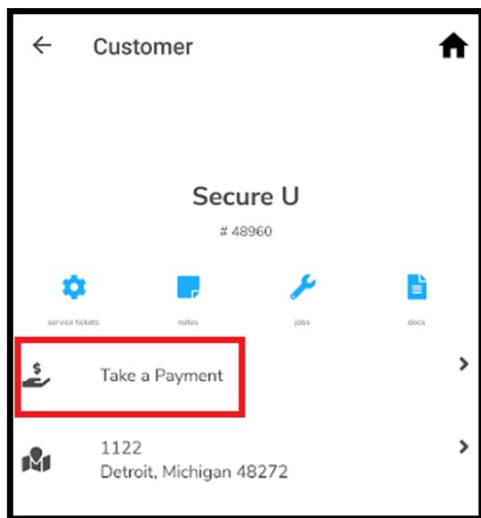
When the menu is opened, choose Customers.



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.

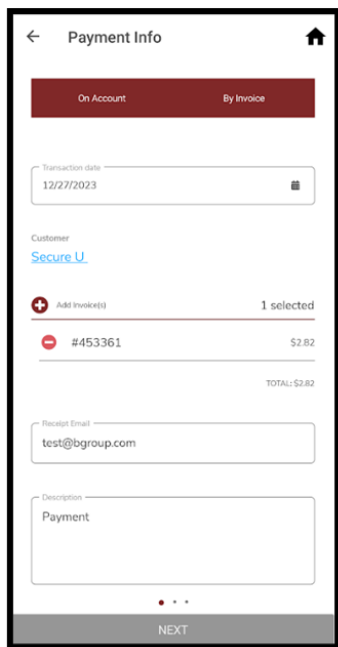
When a customer is chosen, a new window will open showing the customer.

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.



Payment Info

On Account By Invoice

Transaction date
12/27/2023

Customer
[Secure U](#)

+ Add Invoice(s) 1 selected

#453361	\$2.82
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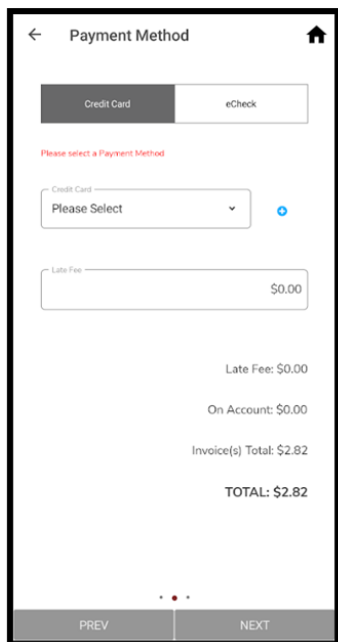
TOTAL: \$2.82

Receipt Email
test@bgroup.com

Description
Payment

NEXT

The next window is Payment Info.



Payment Method

Credit Card eCheck

Please select a Payment Method

Credit Card
Please Select

Late Fee
\$0.00

Late Fee: \$0.00

On Account: \$0.00

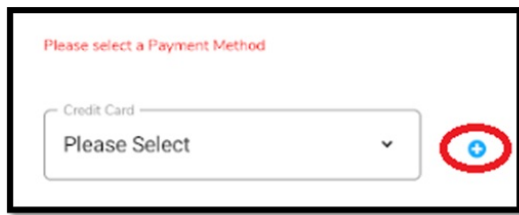
Invoice(s) Total: \$2.82

TOTAL: \$2.82

PREV NEXT

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.

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.