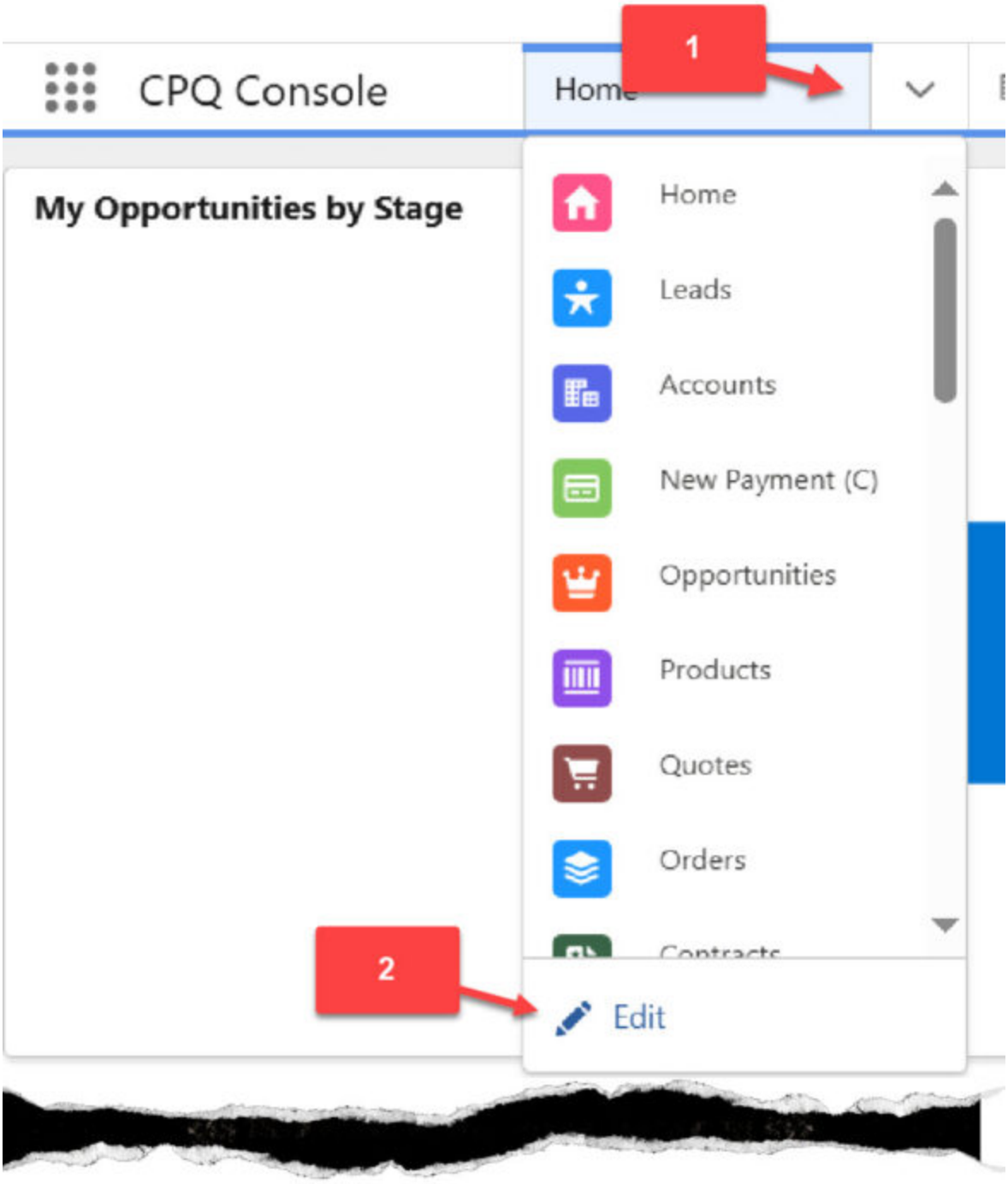
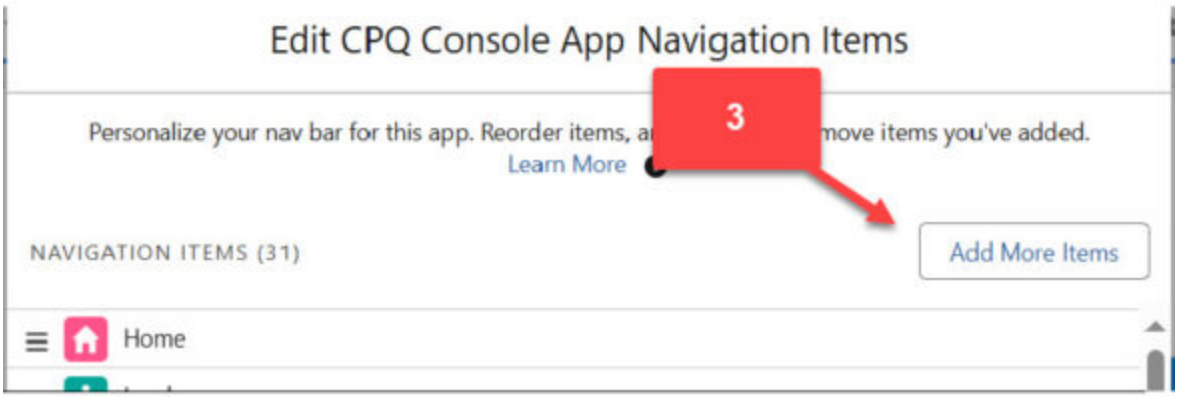
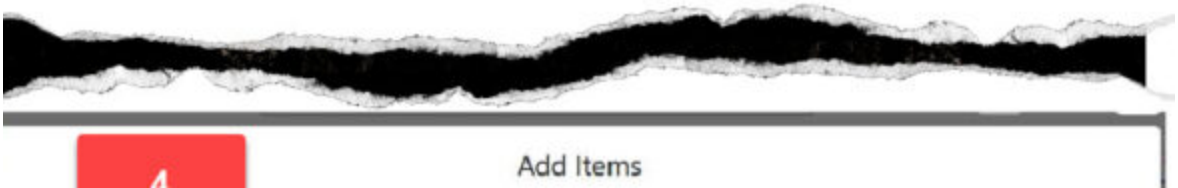
QRG PAY.1 – Adding a New Credit Card Authorization and Processing a Payment

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Adding a New Credit Card Authorization and Processing a Payment


CPQ Console
Home
1
My Opportunities by Stage
Home
Leads
Accounts
New Payment (C)
Opportunities
Products
Quotes
Orders
2
Edit


Edit CPQ Console App Navigation Items
Personalize your nav bar for this app. Reorder items, a
move items you've added.
Learn More
3
NAVIGATION ITEMS (31)
Add More Items
Home


4
Add Items

1. From the Home Screen, Select the drop-down arrow to open the Object Picklist
2. Select Edit
3. Select Add More Items
4. From the Search Bar, Type in NEW PAYMENT (C)
5. Select the + icon
6. Select Add 1 Nav Item
7. Select the Save Button
8. Select the New Payment (C) tab prior to Adding a New Credit Card Authorization.
9. Search and select the account
10. Set Transaction Type to AUTHORIZATION and Transaction amount to 0.00 to add a New Credit Card Authorization. To add a payment with the Credit Card, Select SALE and add the Transaction amount for the sale.
11. Set the Payment Methods to CARD.
12. Add the Credit Card Account Holder Information. To Save the card information, select the Save Card Profile.
13. Add the Card Information
14. Process the Payment and Save the Card

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