



PROCEDE SOFTWARE HELP PORTAL

Payments Product Guide

05/10/2025

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1 | Introduction to Payments

With Payments, customers can pay for parts and service orders by credit cards, cash, check, automated withdraw, or online. This application, a joint effort by Procede Software and Stripe, integrates seamlessly with the Excede Dealership Management System (DMS). It also gives your dealership real-time financial information through Stripe's leading-edge customer portal.

The information in this guide is intended for users who need to run the Payments application in Excede.

1.1 | Glossary

Review these terms before you continue reading this document.

Card

In this document, the word "card" refers to any of:

- Credit card
- Debit card
- Credit/debit card information saved to a mobile payment app like Google Pay or Apple Pay

Card present vs. Card not present

- **Card present:** The customer paid with a physical credit or debit card, or with card information stored on a mobile device.
- **Card not present:** The customer paid by a method that did not require inserting or tapping a card at the reader.

See [Payment methods](#) for details on each type.

Cash payment term

Payments automatically opens when you post a parts or service order with a "cash" payment term. Most dealerships have at least one **Cash** option available in the **Terms** field in the Front Counter Order and Service Order dialogs.

Some dealerships may use the phrase **Due on Delivery (C.O.D)** instead of **Cash**. All "cash" Term Codes have a **Typ** of **Due on delivery (C.O.D)**, as shown in this picture:

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TermId	Des	Typ	Usability	Due	Disc	PctDisc	CrLimitAu...	Inacti...	CurExch
		Due on delivery							
CASH	CASH-CASH	Due on delivery (C.O.D)	Everywhere	0	0	0.00		No	No
CC	CASH-CREDIT CARD	Due on delivery (C.O.D)	Everywhere	0	0	0.00		No	No
CHECK	CASH-CHECK	Due on delivery (C.O.D)	Everywhere	0	0	0.00		No	No
PPACH	PPACH	Due on delivery (C.O.D)	Everywhere	0	0	0.00		No	No
PPCARD	PPCARD	Due on delivery (C.O.D)	Everywhere	0	0	0.00		No	No
PPCASH	PPCASH	Due on delivery (C.O.D)	Everywhere	0	0	0.00		No	No
PPCHCK	PPCHECK	Due on delivery (C.O.D)	Everywhere	0	0	0.00		No	No
PPLINK	PPLINK	Due on delivery (C.O.D)	Everywhere	0	0	0.00		No	No
PPSP	PPSP	Due on delivery (C.O.D)	Everywhere	0	0	0.00		No	No

This document uses the word "cash."

Terminal reader

The physical device at which the customer completes the transaction in the dealership. It presents payment information, prompts the customer to provide payment information, and lets the customer sign using a finger or a stylus.

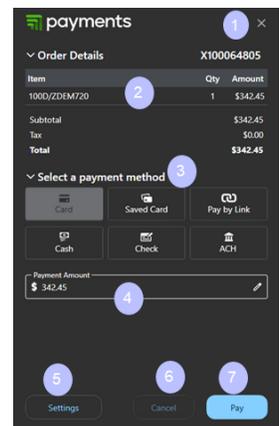
Often referred to as either a "terminal" or a "reader" instead of the full name.

This document uses the term "terminal reader."

1.2 | Payments dialog

When Payments has been enabled at your dealership, Excede automatically opens the **Payment** dialog when you **Post** any non-AR transaction.

- 1 If the customer has not already paid, this button closes the dialog.
If the customer has already paid, this button cancels the transaction and closes the dialog.
- 2
 - Order number
 - List of items / jobs
 - Subtotal, tax, and total amount due



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- 3 Payment methods. Two options are only available in specific situations:
- **Saved Card** can only be selected if the customer previously chose to save a credit card.
 - **ACH** can only be selected if the customer's bank account information is already saved in the Stripe portal.

- 4 Data entry fields reflect the selected payment method.
- **Payment Amount** always appears. You can change this value for split payments or cash transactions.
 - List of saved cards appears when paying with a saved card.
 - List of bank accounts setup for automated withdrawal when paying by ACH.
 - Customer contact information appears when paying by link.

- 5 Select **Settings** to see the available terminal readers. This button only appears when you select **Card** as a payment method.

After setup, the terminal reader for your work area normally stays selected without any adjustment.

- 6 Cancels the transaction and closes the Payments dialog.
- This button is available only before the customer makes a payment. After that, you can still cancel the transaction, but not by using this button.

- 7 **Pay** appears for every payment method except **Pay by Link**, which uses **Send Link** instead of **Pay**.

Payments dialog rules

The **Payments** dialog works differently than other tools in Excede:

Only opened by posting

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The **Payments** dialog only opens as a result of posting. You cannot "force" it open through the **View** menu or any other command.

Cannot be moved or minimized

The **Payments** dialog always appears on the right side of your screen. You cannot move or minimize it.

Use mouse, not Tab button

Use your mouse to move around the **Payments** dialog. The **Tab** keyboard button does not move the cursor.

1.3 | Payment methods

Payments supports several payment methods. These can be enabled and disabled through Branch Communication Settings, so all the methods may not be available at your dealership.

You may hear these methods categorized as "card present" and "card not present" options. These terms are standard in the Point of Sale industry but may not be familiar to dealership employees.

Payment method	Available when	TrmId after posting	Card present	Card not present
Card	Always	PPCARD		
Saved Card	The customer previously paid through Payments and saved a card. Customers can save multiple cards.	PPCARD		
Pay by Link	Always Link can be delivered by email or text.	PPLINK		

Payment method	Available when	TrmId after posting	Card present	Card not present
Cash	Always	PPCASH		
Check	Always	PPCHCK		
ACH	The customer's bank account information has been added in the Stripe portal. This information is not captured on the customer record in Excede.	PPACH		

Split payments

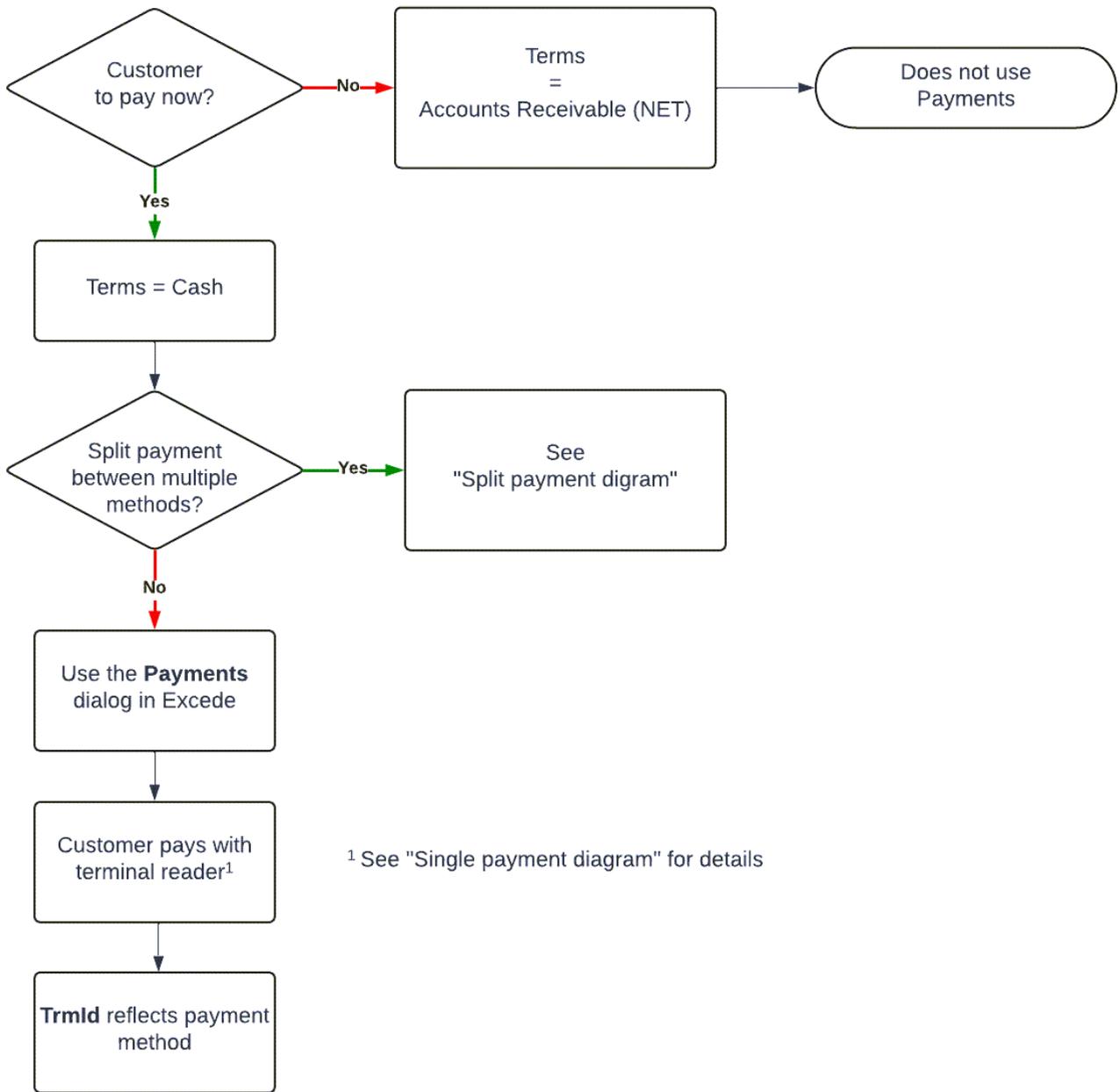
If you split a payment between more than one method, the **TrmId** = PPSP.

1.4 | Workflow diagrams

The following sections show the steps performed by a dealership employee and the customer to pay for an order using Payments:

- Overview diagram
- Single payment diagram
- Split payment diagram

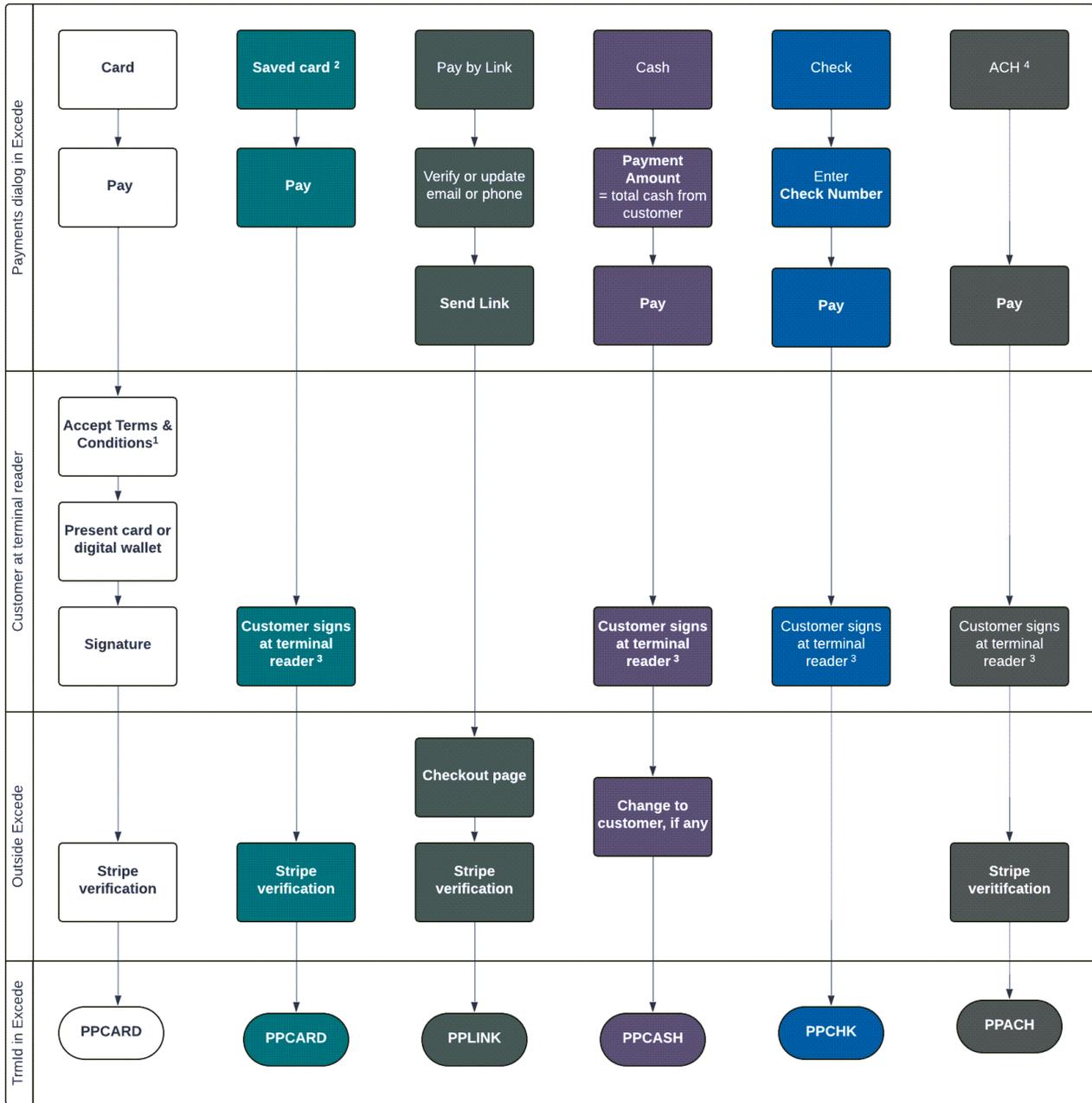
1.4.1 | Overview diagram



¹ See "Single payment diagram" for details

1.4.2 | Single payment diagram

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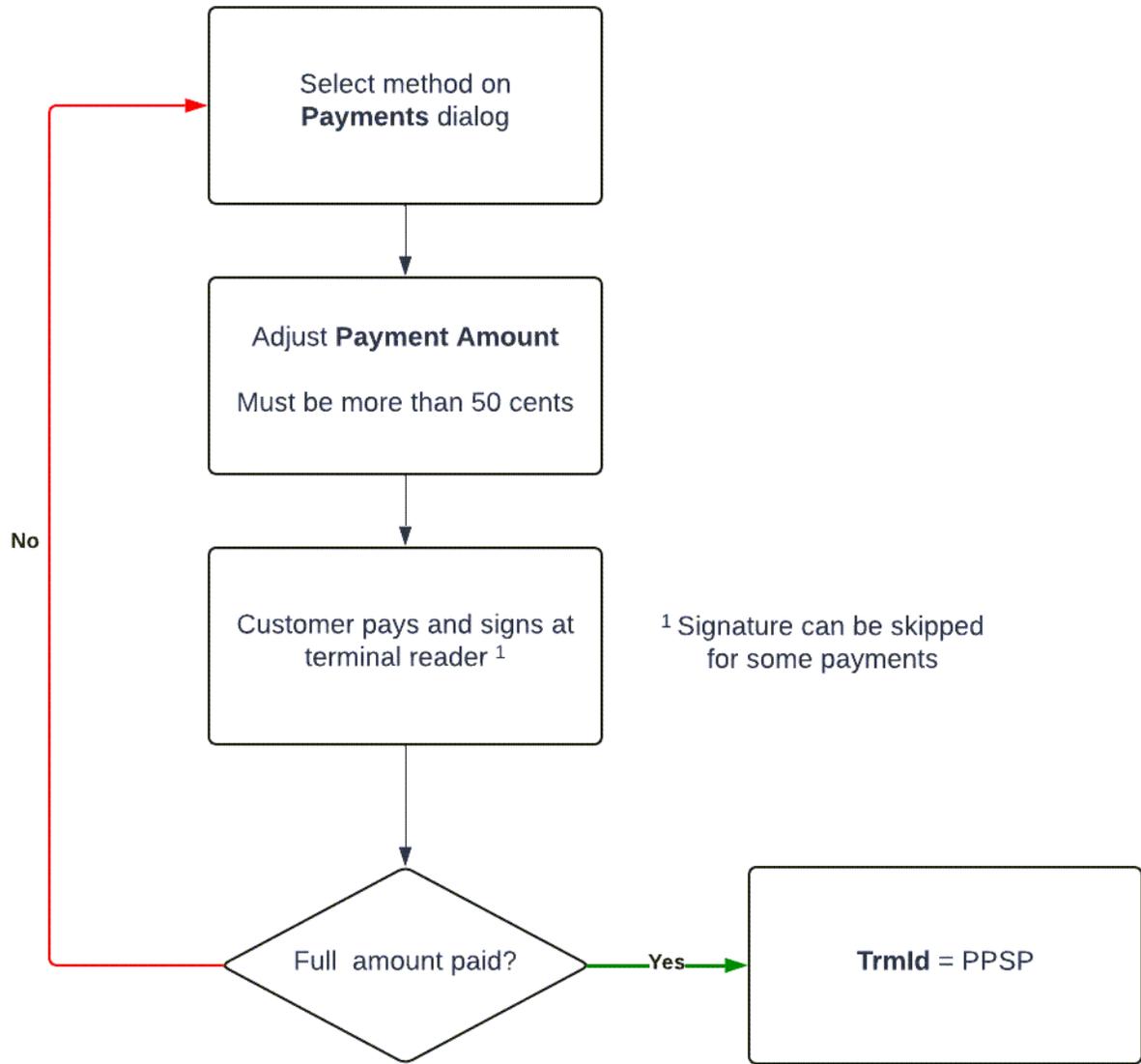
¹ Optional by dealership

² Only available when customer already saved card information

³ Signature can be skipped

⁴ Only available when customer bank account info saved in Stripe portal

1.4.3 | Split payment diagram



1.5 | Understand merchant responsibilities

As a merchant working with Procede Software, you'll be responsible for various actions. These actions are accessible via the Stripe dashboard on your newly created account. While accepting payments, you'll be responsible for:

- Monitoring account status and providing any necessary information to keep your account enabled.
- Completing refunds.
- Monitoring for and responding to disputes.

If any issues arise while completing these actions, please contact Procede Support.

2 | Take payments

The instructions in this section cover how to use Payments to accept customer payments for orders in Excede.

Dealership rules versus Payments functionality

Your dealership may require you to follow specific payment procedures that cannot be enforced by Payments.

Examples:

- Your dealership might only accept checks from customers who have done business with you for more than two years. However, the **Check** payment method is always available on the **Payments** dialog.
- Your dealership may require counterfeit tests for \$100 bills. Payments does not prompt you to perform a test for **Cash** payments of more than \$100.

Be sure to follow your dealership's rules, regardless of what actions may be technically possible on the **Payments** dialog.

2.1 | Card payment

1. Open the order in Excede.
2. Set the **Terms** to Cash.

Important

If you choose an AR, NET, FLEET, or other "billing" term, the **Payments** dialog will **not** open and the customer will **not** be able to pay at the terminal reader.

If you choose one of the term codes that begin with PP, like PPCARD, and the customer pays by a different method, the **TrmId** changes after posting to show the actual payment method.

3. Select **Post Direct (Ctrl+T)**.
4. The **Payments** dialog appears on the right side of the screen.
5. Review the order information. To adjust the items on the order, select the **X** in the upper right corner, make your changes, and then repeat the previous steps.
6. Select **Card** as the payment method.
7. Select **Pay**.

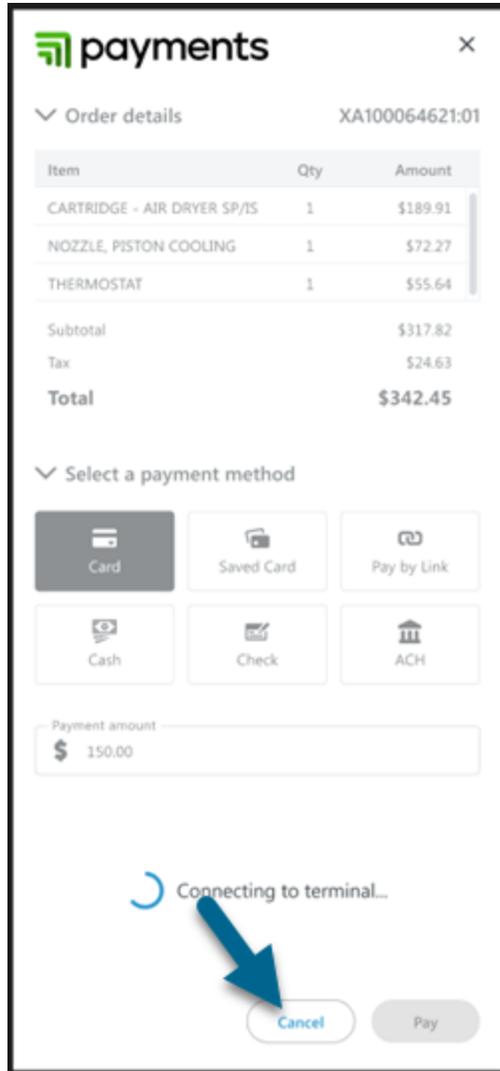
Note

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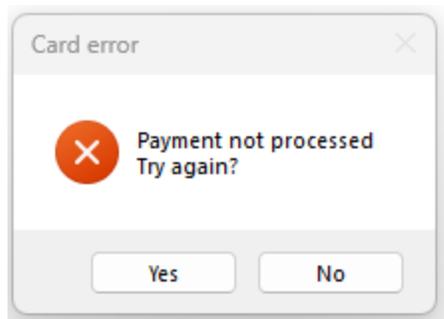
Need to cancel the transaction now?

To cancel a transaction after you select **Pay** on the **Payments** dialog but before the customer presents a card or signs at the terminal reader:

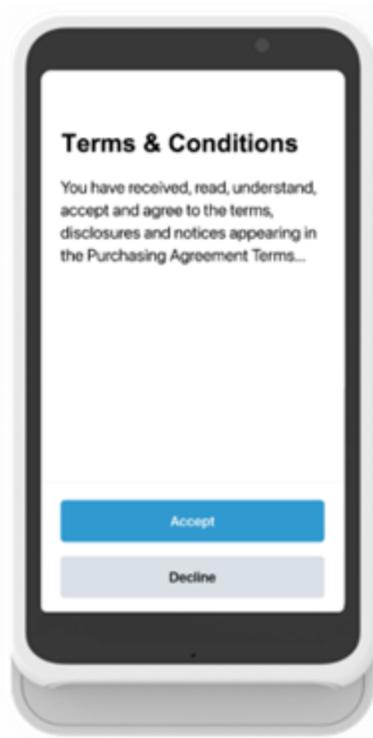
1. Select **Cancel** at the bottom of the **Payments** dialog.



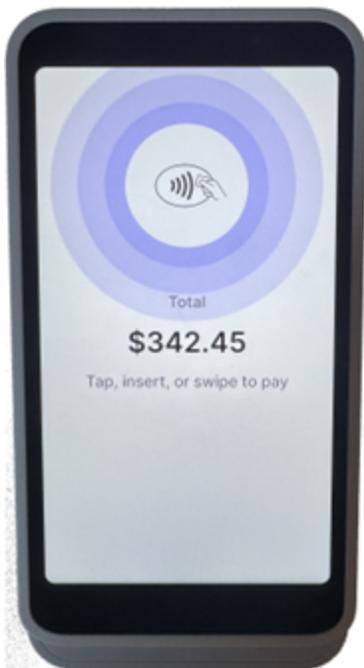
2. Select **No** when prompted to try again.



8. If your dealership enabled the Terms & Conditions feature, the terminal reader prompts the customer to accept them. Declining cancels the transaction.



9. The terminal reader prompts the customer to pay:



10. The customer can:

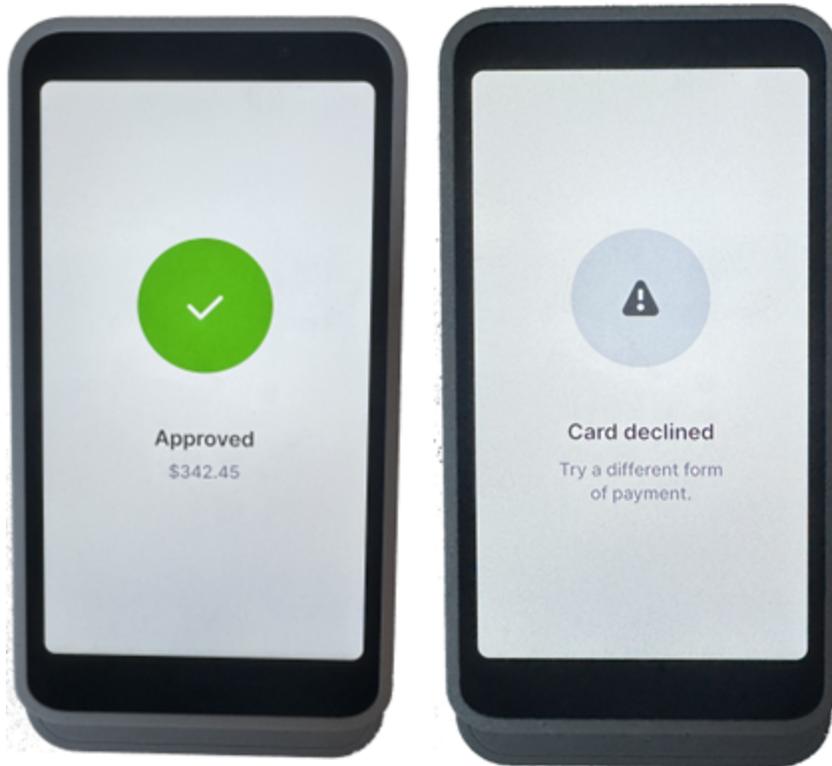
- a. Swipe a card
- b. Insert a card

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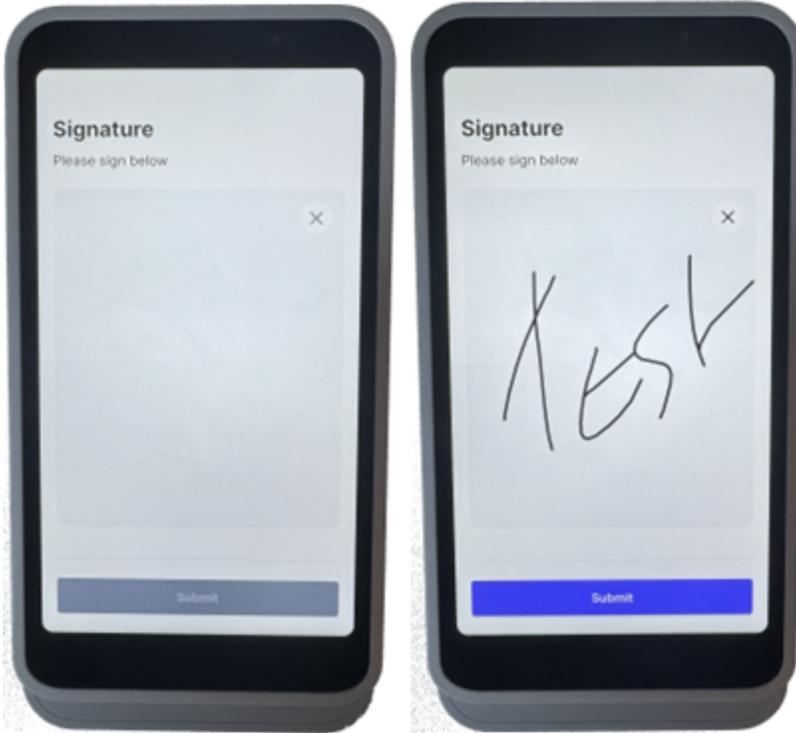
c. Tap a card

d. Use a Wallet app (Apple Pay or Google Pay) on a phone

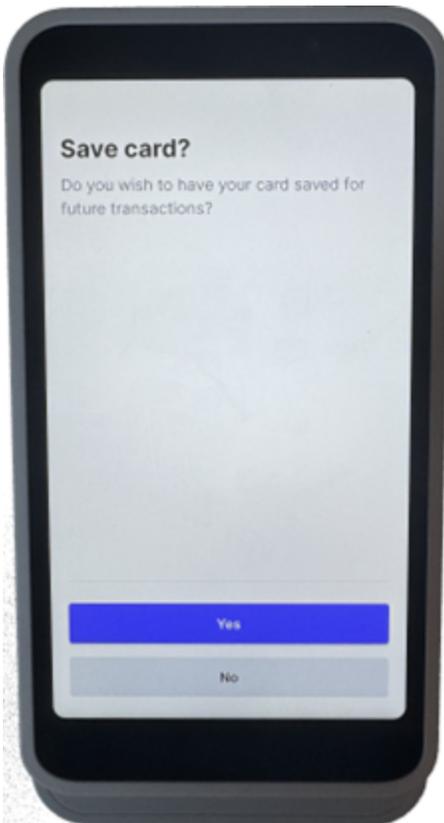
11. The terminal reader shows the status of the transaction (*Approved* or *Card declined*). See [Declined card](#) for information on failed transactions. The rest of this procedure assumes that Stripe approved the transaction.



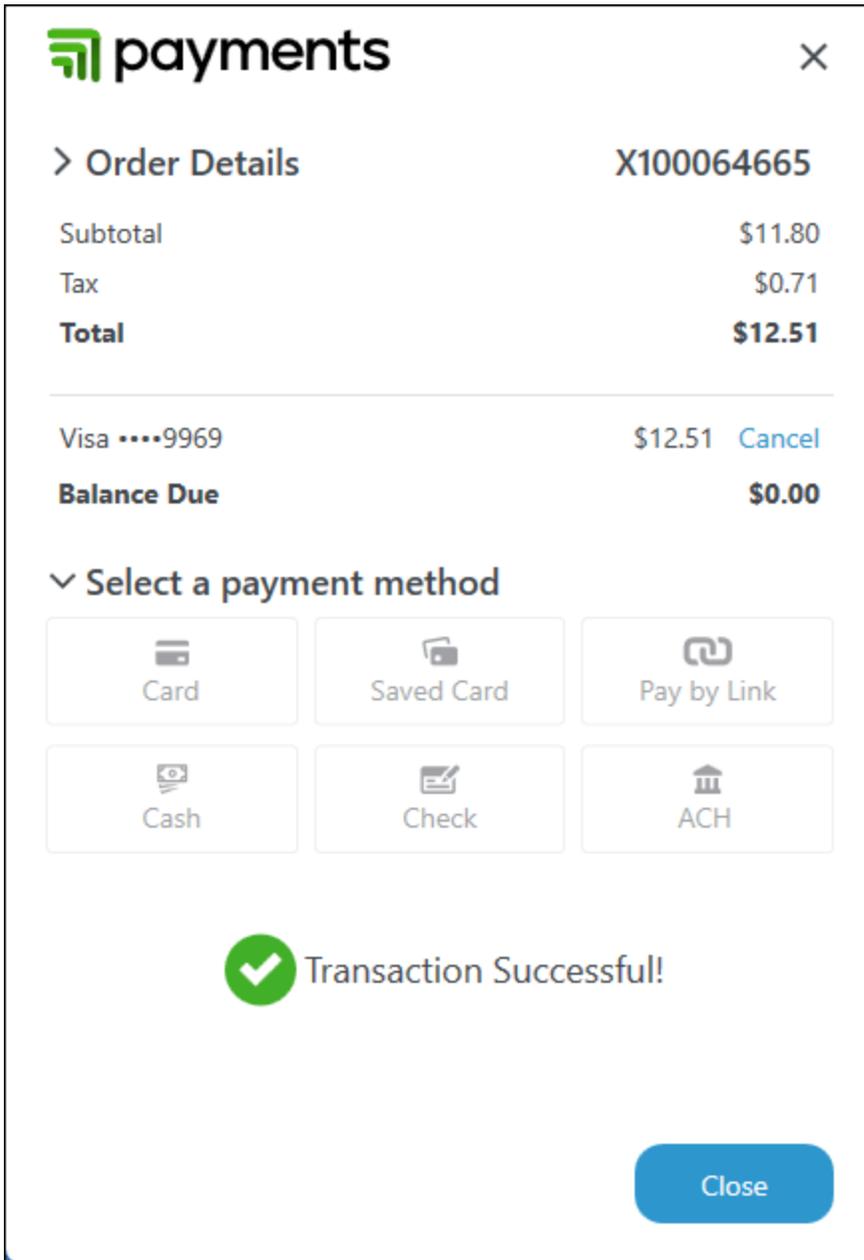
12. The terminal reader prompts the customer for a signature.



13. The terminal reader gives the customer the choice to save the card for future use.



14. The Payments dialog shows *Transaction Successful!*

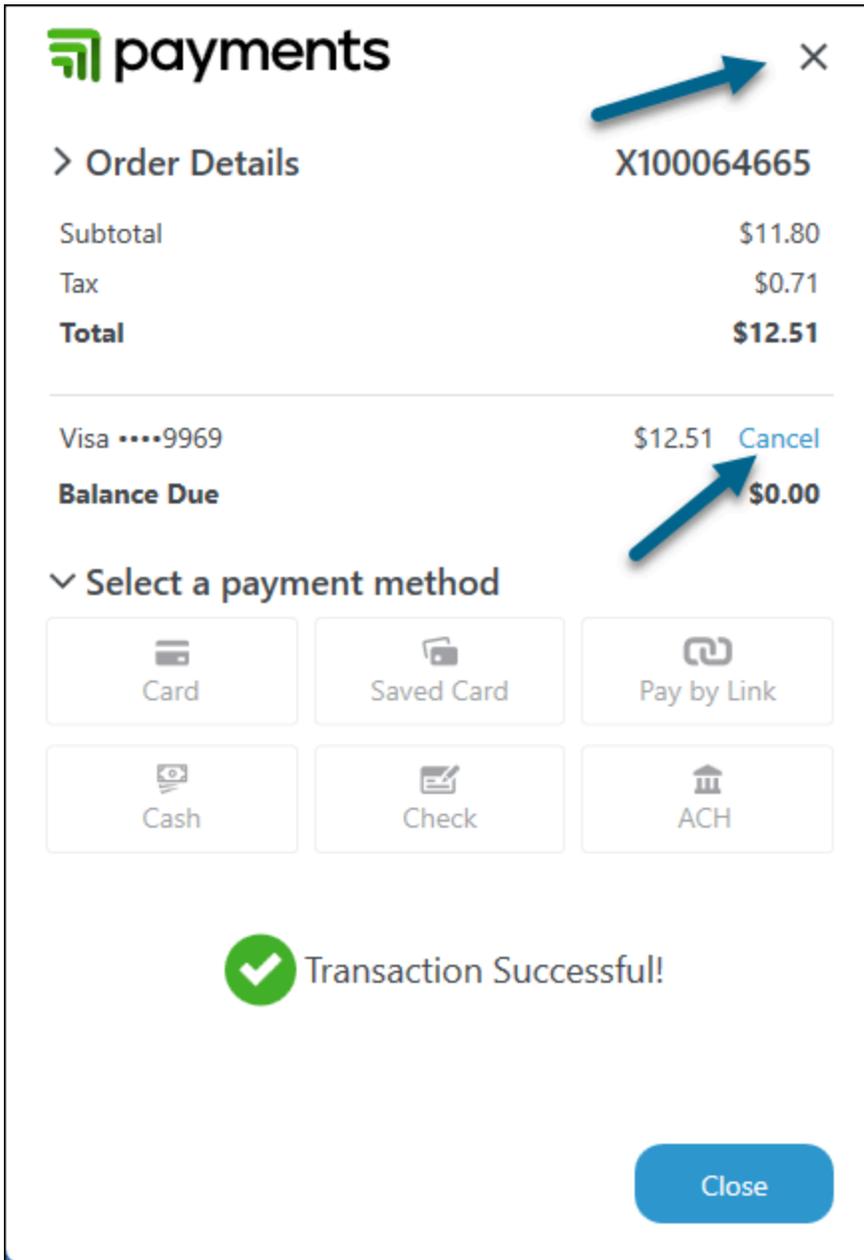


15. Close the Payments dialog.

Note

You can cancel successful or pending transactions by:

- selecting the **Cancel** link next to the payment amount on the **Payments** dialog.
- selecting the **x** in the top right corner of the **Payments** dialog.



If you already closed the Payments dialog, post the order again to open it.

Order information in Excede

How far along is the transaction?	Status	TrmId	PaymentStatus
Approved transaction	Invoiced	PPCARD	Approved
Failed transaction	Open	PPCARD	Failed

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How far along is the transaction?	Status	TrmId	PaymentStatus
Transaction canceled in Excede after payment made	Open	CASH*	None

* original payment term

See the process

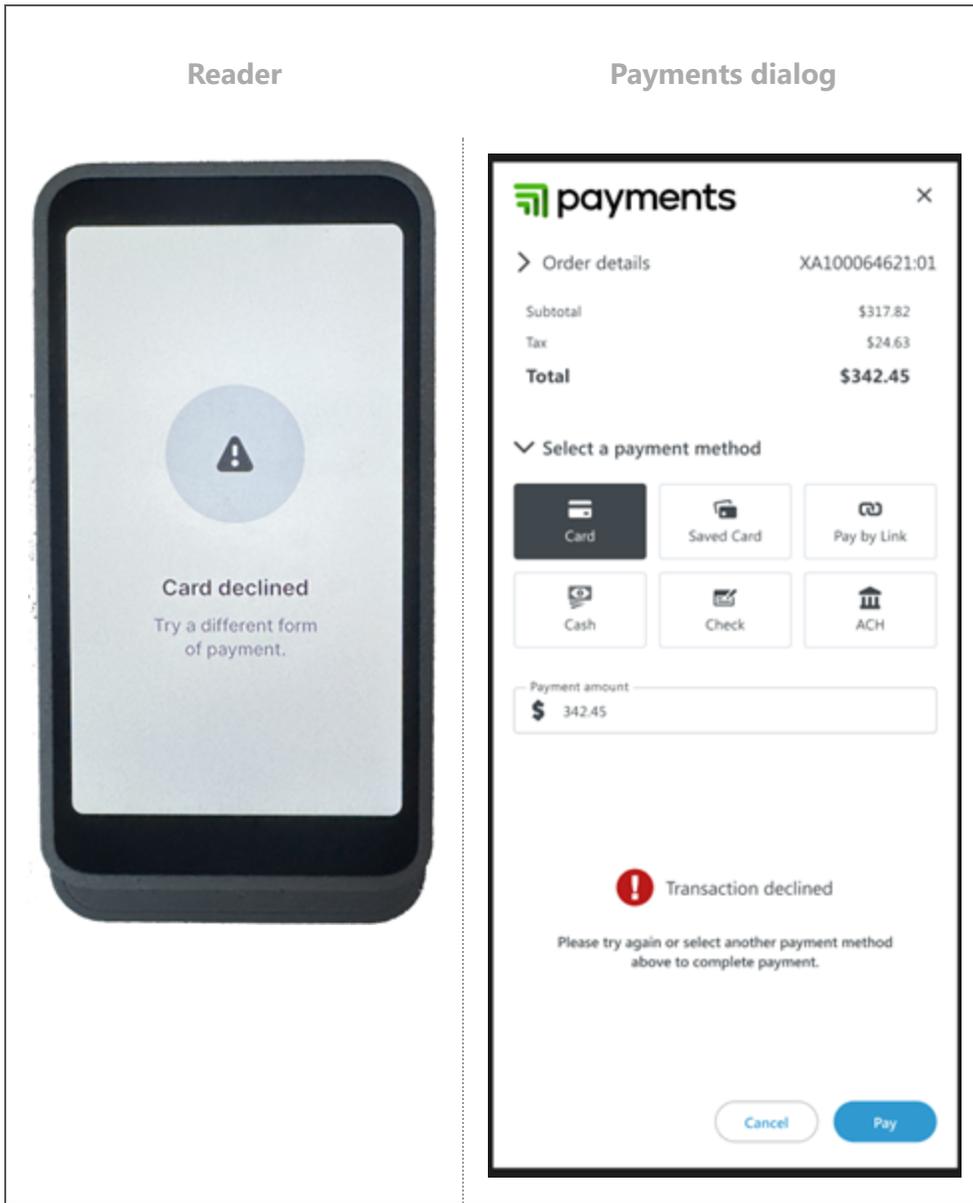
This animation shows the steps in Excede, not at the reader.

The screenshot shows a software application window titled "100 - PROCEDE MOTORS OF CALIFORNIA". The interface includes a toolbar with various actions such as "Export Selection to Excel", "Export Filtered Results", "Export Entire Recordset", "Delete", "Refresh Window", "Reset Smart Filter", "Reset All Filters", "Open Notes", "Create Notes", "Post Direct Post", "Field Chooser Layout", "Print", "Print Preview", "List Print", "List Preview", "Forms", "Help (F1)", and "Help". The main area displays a table of transactions for "Order X100064296 For BILL REID". The table has columns for SlsId, AmtSubtotal, Status, TrmId, PaymentStatus, SlsTypId, and Cl. Transaction X100064296 is highlighted in blue. The status bar at the bottom shows "Selected: 1 Item(s) \$800.61 Total: 500 Item(s) \$166,519.50".

SlsId	AmtSubtotal	Status	TrmId	PaymentStatus	SlsTypId	Cl
X100064441	1,210.38	Open	CASH		PRFC	11
X100064296	800.61	Open	CASH		PRET	11
X100064148	48.00	Open	CASH		PRET	10
E100003040	1,165.72	Open	CASH		PRET	15
E100003039	37.03	Open	CASH		PRET	17
E100003034	371.58	Open	CASH		PRET	15
E100003030	1,137.62	Open	CASH		PRET	10
X100064605:01	57.60	Invoiced	PPCASH		PRET	CA
X100064602:01	43.52	Invoiced	PPCASH		PRET	CA
X100064594:01	-7.14	Invoiced	PPCASH		PRET	CA
X100064593:01	7.14	Invoiced	PPCASH		PRET	CA
X100064584:02	13.58	Invoiced	PPCASH		PRET	10
X100064584:01	0.00	Invoiced	CASH		PRET	CA
X100064582:01	0.02	Invoiced	PPCASH		PRET	CA
X100064580:01	0.05	Invoiced	PPCASH		PRET	CA
X100064579:01	0.97	Invoiced	CASH		PRET	CA

2.1.1 | Declined card

Both the reader and the **Payments** dialog indicate when a customer's card has been declined.



The next steps depend on what the customer chooses to do:

Customer wants to...	Steps
Try the same card again	<ol style="list-style-type: none">1. Select Pay on the Payments dialog. Card will still be the selected method.2. The reader prompts the customer for payment and signature again.3. The reader and the Payments dialog show success or failure information.<ol style="list-style-type: none">a. Success

Customer wants to...	Steps
Use a different card	<ul style="list-style-type: none"> i. Status = Invoiced ii. TrmId = PPCARD <p>b. Failure: Suggest the customer choose a different card or payment method</p> <ol style="list-style-type: none"> 1. Select Pay on the Payments dialog. Card will still be the selected method. 2. Make sure the customer chooses a different card at the reader. 3. The reader and the Payments dialog show success or failure information.
Choose a non-card payment method	<ul style="list-style-type: none"> a. Success <ul style="list-style-type: none"> i. Status = Invoiced ii. TrmId = PPCARD b. Failure: If more than one card fails, you may want to check with your supervisor. Multiple card failures could indicate that the customer's credit accounts have been frozen. Your dealership may have specific procedures for this situation. <p>Offer the customer the option to pay by cash, check, link, or ACH (if available).</p>

2.2 | Saved card payment

The **Saved Card** method is available only when the customer has at least one saved card on file.

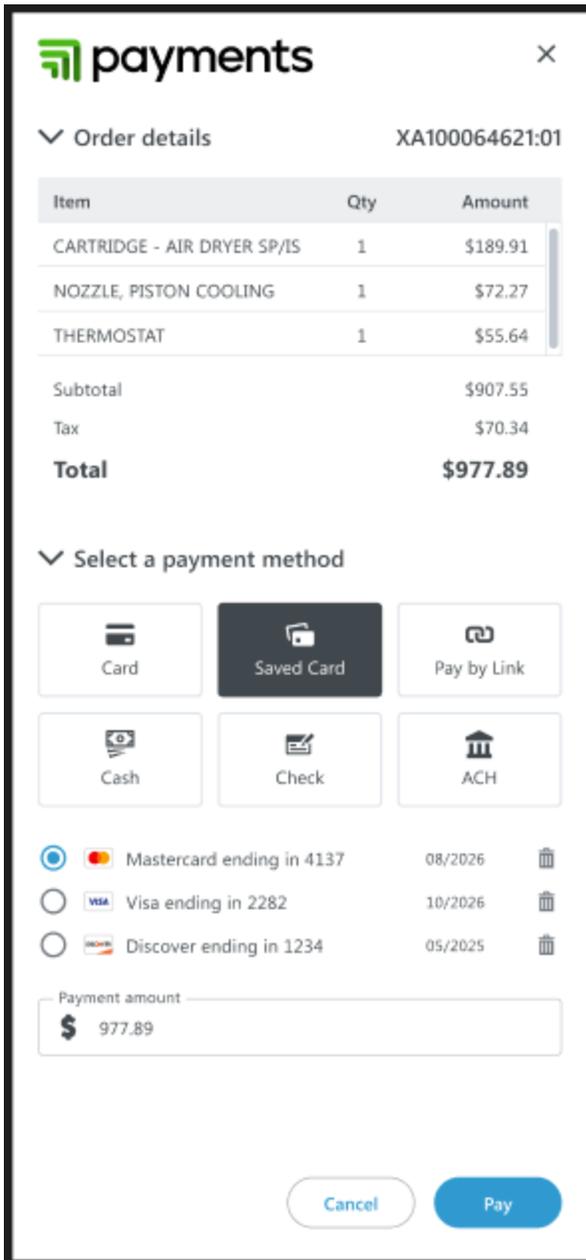
1. Open the order in Excede.
2. Set the **Terms** to Cash.

Important

If you choose an AR , NET, FLEET, or other "billing" term, the **Payments** dialog will **not** open and the customer will **not** be able to pay at the terminal reader.

If you choose one of the term codes that begin with PP, like PPCARD, and the customer pays by a different method, the **TrmId** changes after posting to show the actual payment method.

3. Select **Post Direct** (Ctrl+T).
4. The **Payments** dialog appears on the right side of the screen.
5. Review the order information. To adjust the items on the order, select the **X** in the upper right corner, make your changes, and then repeat the previous steps.
6. Select **Saved Card** as the payment method.



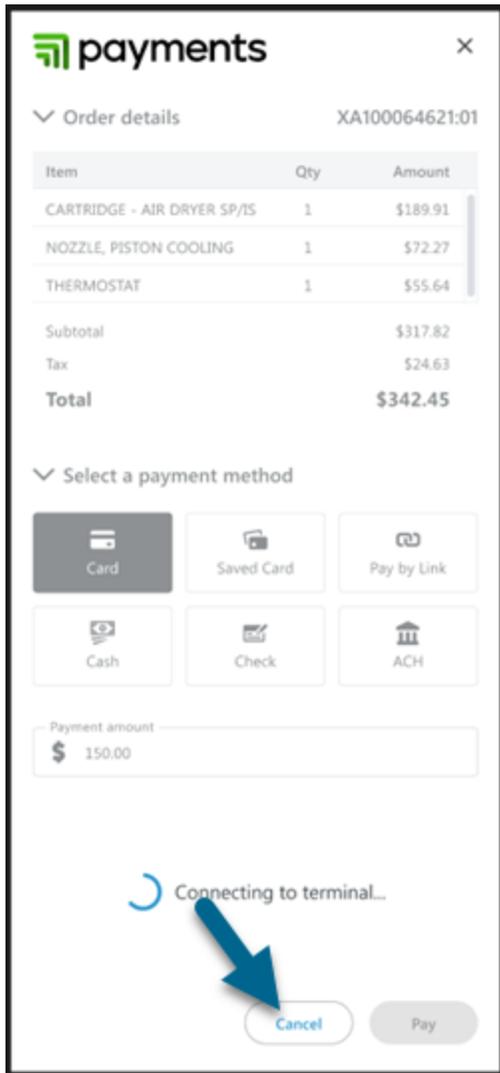
7. The **Payments** dialog shows any saved cards. Ask the customer which card to use.
 - a. You can delete  a saved card. Be sure to confirm with the customer before doing so.
8. Select **Pay**.

Note

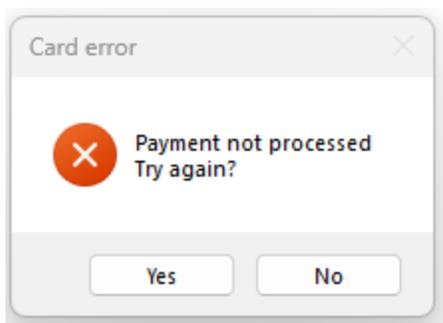
Need to cancel the transaction now?

To cancel a transaction after you select **Pay** on the **Payments** dialog but before the customer presents a card or signs at the terminal reader:

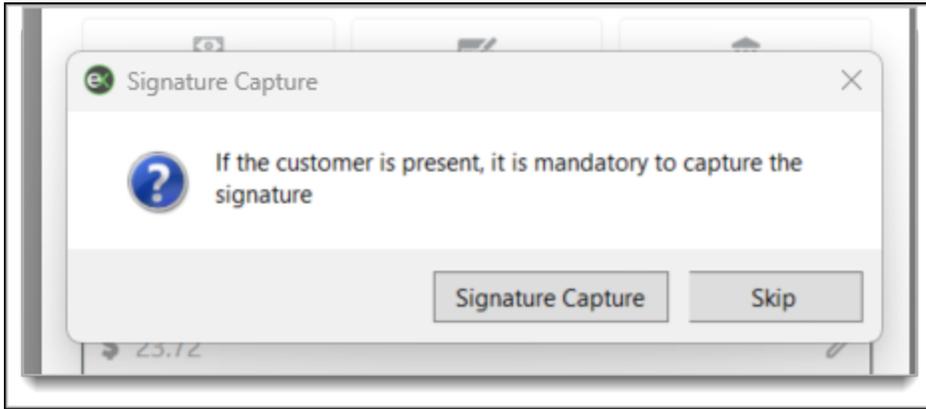
1. Select **Cancel** at the bottom of the **Payments** dialog.



2. Select No when prompted to try again.



9. You are prompted to capture the customer's signature (default) or skip this step. Follow your dealership's rules for saved card payments.



10. If you didn't skip the signature, the terminal reader prompts the customer to sign the screen.

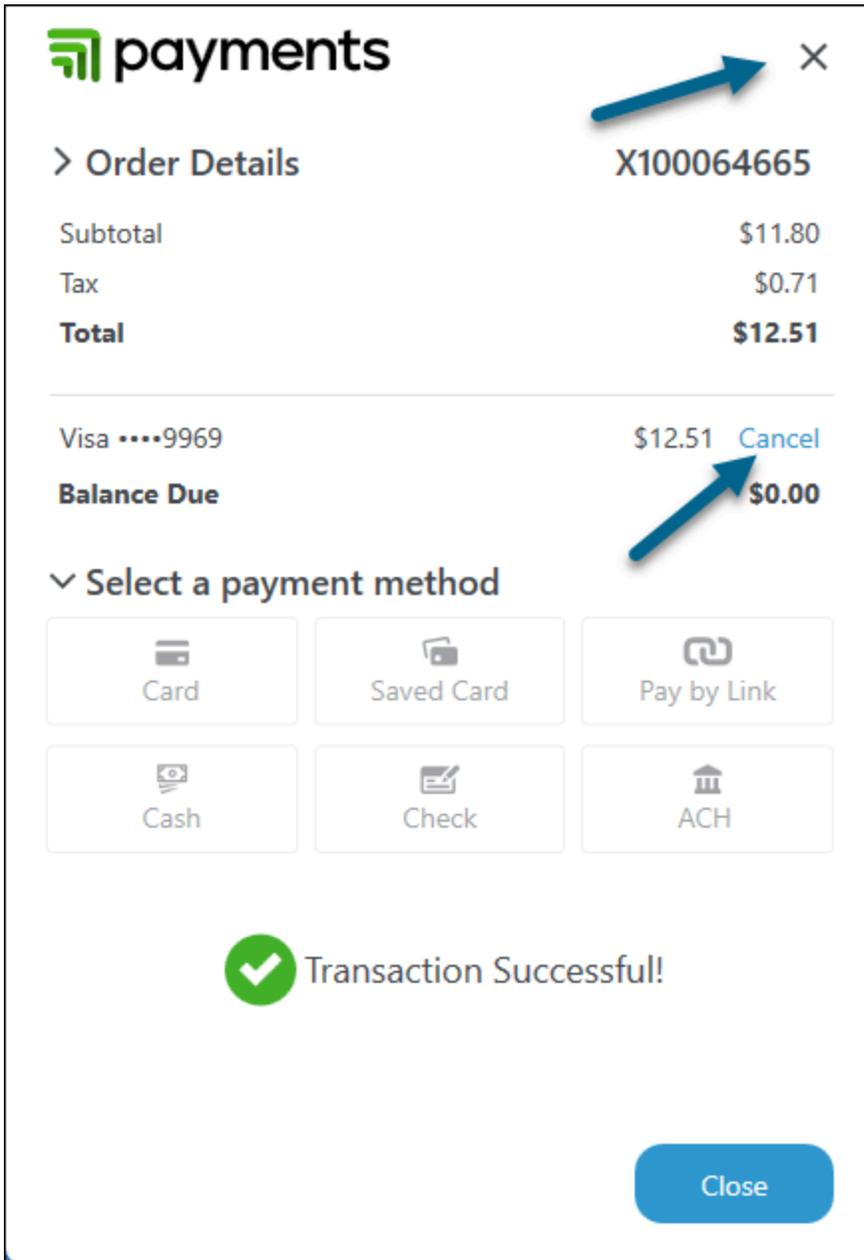
11. The **Payments** dialog shows *Transaction Successful!*

12. Close the **Payments** dialog.

Note

You can cancel successful or pending transactions by:

- selecting the **Cancel** link next to the payment amount on the **Payments** dialog.
- selecting the x in the top right corner of the **Payments** dialog.



If you already closed the Payments dialog, post the order again to open it.

Order information in Excede

How far along is the transaction?	Status	TrmId	PaymentStatus
Approved transaction	Invoiced	PPCARD	Approved
Failed transaction	Open	PPCARD	Failed

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How far along is the transaction?	Status	TrmId	PaymentStatus
Transaction canceled in Excede after payment made	Open	Cash	None

* original payment term

Payment declined?

See <https://docs.stripe.com/declines/codes#stripe-decline-codes> for a comprehensive explanation of the decline codes you may see.

See the process

This animation shows the steps in Excede, not at the terminal reader.

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4480 For RONNIE LOWE

	AmtSubtotal	Status	TrmlId	PaymentStatus	SlsTypId	CusId	DateCreate
	0.00	Open	PPLINK		PRET	11060	5/23/2011
	1.02	Open	PPSP		PRET	11060	5/23/2011
1	15.36	Invoiced	PPSP		PRET	11060	6/24/2024
1	0.98	Invoiced	PPCARD		PRET	11060	6/24/2024
5	14.36	Invoiced	PPLINK		PRET	11060	5/23/2011
4	0.00	Invoiced	PPCARD		PRET	11060	5/23/2011
3	38.62	Invoiced	PPCARD		PRET	11060	5/23/2011
3	3.59	Invoiced	PPSP		PRET	11060	5/23/2011
2	0.00	Invoiced	CASH		PRET	11060	5/23/2011
1	6.63	Invoiced	PPCARD		PRET	11060	5/23/2011

2.3 | Pay by Link

This option will most commonly be used when either:

- the customer isn't physically present and doesn't have a saved card for Payments.
- the customer physically present in the dealership doesn't have a company card and/or lacks the authority to pay the amount.

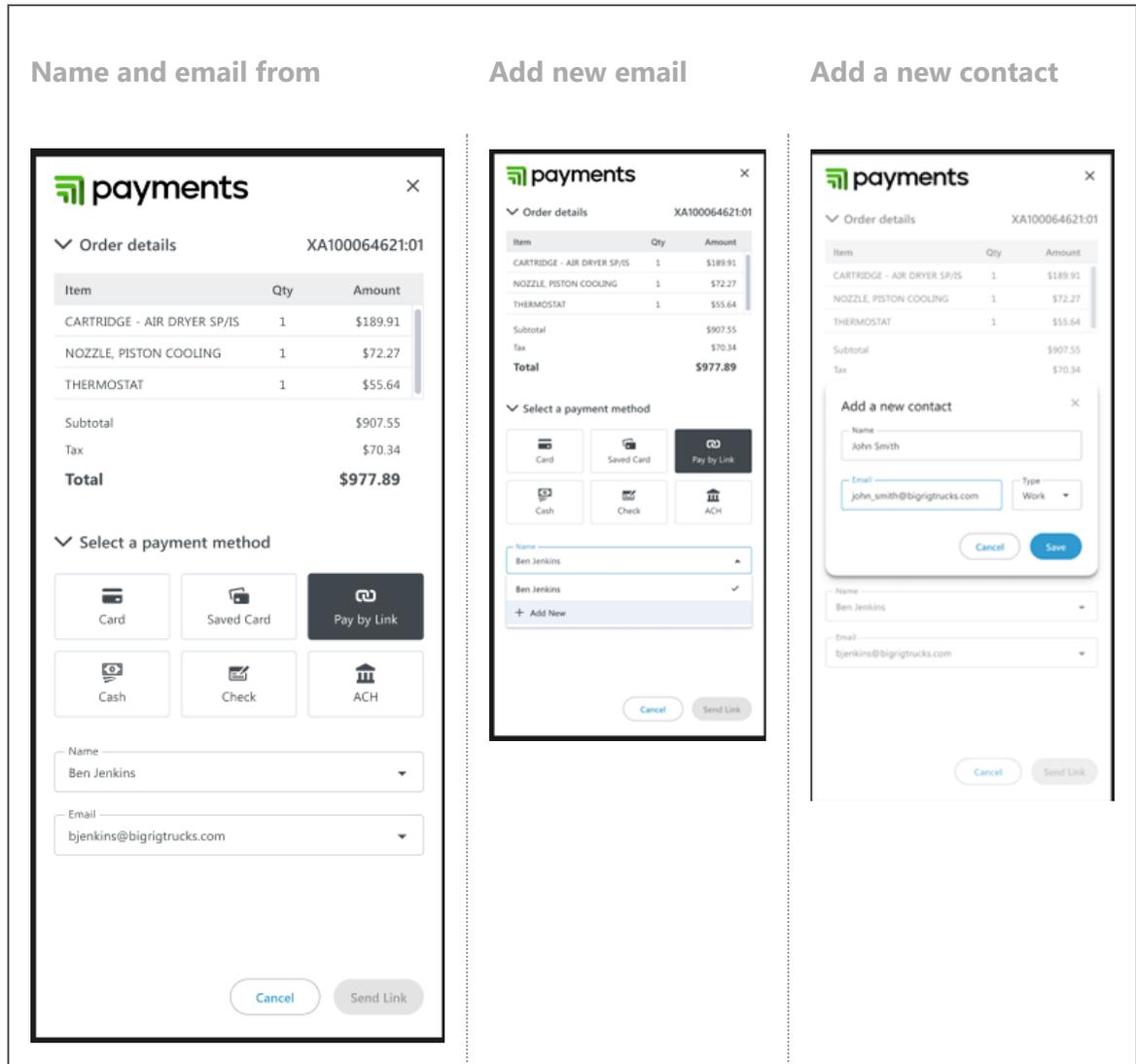
1. Open the order in Excede.
2. Set the **Terms** to Cash.

Important

If you choose an AR , NET, FLEET, or other "billing" term, the **Payments** dialog will **not** open and the customer will **not** be able to pay at the terminal reader.

If you choose one of the term codes that begin with PP, like PPCARD, and the customer pays by a different method, the **TrmId** changes after posting to show the actual payment method.

3. Select **Post Direct (Ctrl+T)**.
4. The **Payments** dialog appears on the right side of the screen.
5. Review the order information. To adjust the items on the order, select the **X** in the upper right corner, make your changes, and then repeat the previous steps.
6. Select **Pay by Link** as the payment method.
7. The **Payments** dialog shows the customer's **Name** and **Email** and **Phone** fields.
 - a. These fields reflect the customer's information in Excede. Customers may have multiple saved email addresses and phone numbers (Home, Work, Other).
 - b. If these fields are blank, or the customer wants to use a different email / phone, enter the correct information by clicking the **Email** field and selecting **Add New**.



- 8. Select **Send Link**. The **Payments** dialog shows a *Transaction Started!* message.
- 9. **Payments** sends an invoice to the specified email address.

Note

The payment link in the email expires in 24 hours.

- 10. You can **Close** the **Payments** dialog while you wait for the payment.

Note

The **PaymentStatus** for the order = *Pending* until receives confirmation.

Id	AmtSubtotal	Status	TrmId	PaymentStatus	IsTypId	CusId	DateCreate
X100064519	53.12	Open	PPLINK	Pending	PRET	12117	5/23/2011

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11. The email recipient selects the link in the email message and makes the payment online:

TRUCK CENTERS

Pay
\$1,660.92

100C/4969721NX MODULE,INLET CATALYST	\$1,509.93
100C/4969721NX-CORE (4965285D) MODULE,INLET CATALY	\$374.00
100C/4969721NX-CORE (-\$374.00) (4965285D) MODULE,INLET CATALY	\$0.00
Tax 10% (SD) SAN DIEGO TAX	\$150.99
Subtotal	\$2,034.92
Total due	\$1,660.92

Powered by **stripe** | [Terms](#) | [Privacy](#)

Contact information

Email

Payment method

Card US bank account Google Pay

Card information

1234 1234 1234 1234

MM / YY CVC

Cardholder name

Full name on card

Country or region

United States

ZIP

I agree to Fake Kriete's [Terms of Service](#).

Pay

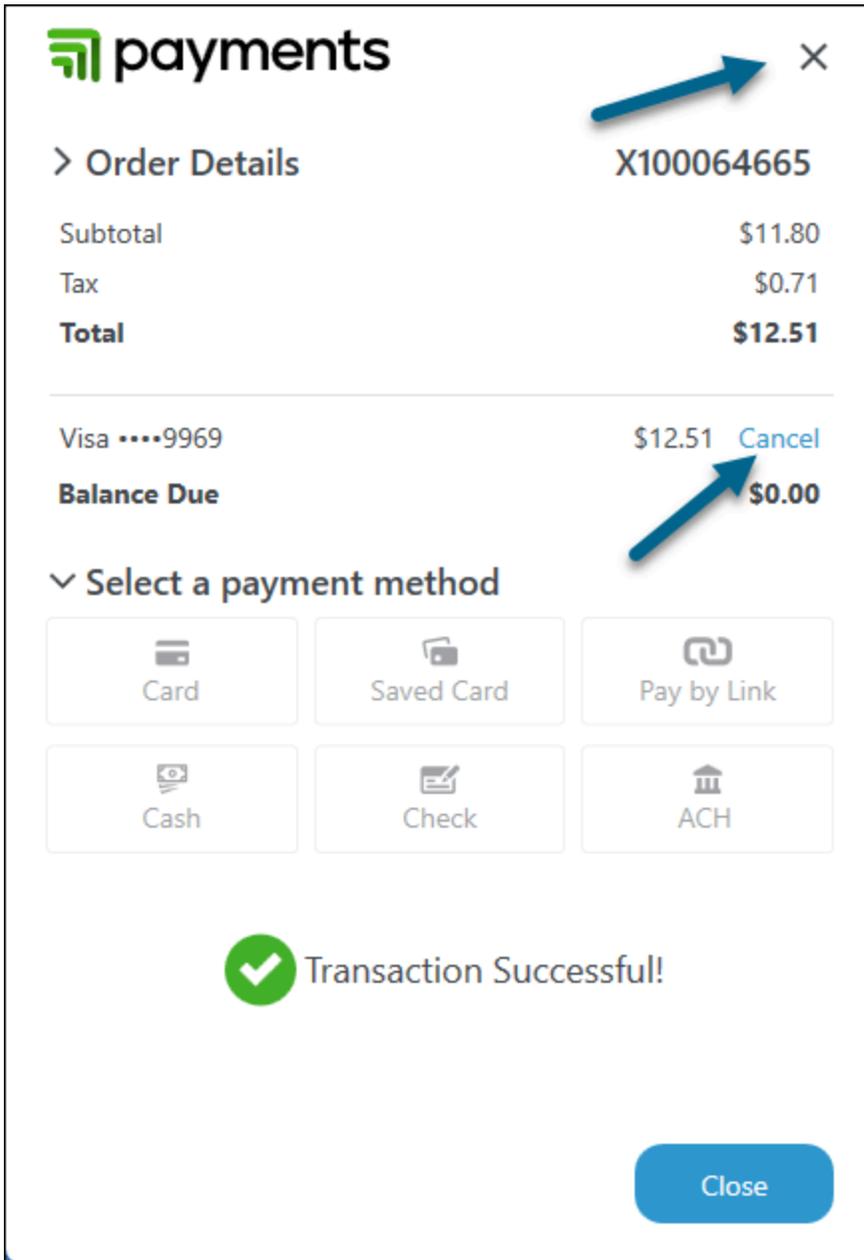
By confirming your payment, you allow Fake Kriete to charge you for this payment and future payments in accordance with their terms.

12. The **PaymentStatus** automatically changes from *Pending* to *Approved* and the order's **Status** changes from *Open* to *Invoiced*. You may need to refresh the screen in to see these changes.

Note

You can cancel successful or pending transactions by:

- selecting the **Cancel** link next to the payment amount on the **Payments** dialog.
- selecting the x in the top right corner of the **Payments** dialog.



If you already closed the Payments dialog, post the order again to open it.

Order information in Excede

How far along is the transaction?	Status	TrmId	PaymentStatus
Customer has not yet paid, link still active	Open	PPLINK	Pending
Customer paid within 24 hours	Invoiced	PPLINK	None

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How far along is the transaction?	Status	TrmId	PaymentStatus
Customer did not pay within 24 hours, link expired	Open	PPLINK	Failed
Transaction canceled in Excede either: <ul style="list-style-type: none">• after link sent but before 24 hours• after payment made	Open	PPLINK	None

See the process

This animation shows the steps in Excede, not at the terminal reader.

Payments Product Guide

The screenshot displays a software interface for managing payments. At the top, there is a menu bar with various icons and labels: 'en Create Notes', 'Post Direct Post', 'Field Chooser Layout', 'Print', 'Print Preview', 'List Print', 'List Preview', 'Forms', and 'Help (F1) Help'. A mouse cursor is positioned over the 'Post Direct Post' icon. Below the menu bar is a table with the following columns: 'Trmid', 'PaymentStatus', 'SlsTypId', 'CusId', and 'DateCreate'. The table contains 20 rows of data. The first row is highlighted in blue and has the following values: 'CASH', (blank), 'PRET', '12117', and '5/23/2011'. The second row has 'PPLINK', 'Pending', 'PRET', '11060', and '5/23/2011'. The third row has 'AR30', (blank), 'PRET', '10739', and '5/23/2011'. The fourth row has 'FLEETC', (blank), 'PRFCV', '10563', and '5/23/2011'. The fifth row has 'FLEETC', (blank), 'PRFC', '11851', and '5/23/2011'. The sixth row has 'CASH', (blank), 'PRFC', '11851', and '5/23/2011'. The seventh row has 'FLEETC', (blank), 'PRFCV', '11158', and '5/23/2011'. The eighth row has 'FLEETC', (blank), 'PRFC', '11851', and '5/23/2011'. The ninth row has 'FLEETC', (blank), 'PRFC', '10662', and '5/21/2011'. The tenth row has 'AR30', (blank), 'PRET', '10312', and '5/20/2011'. The eleventh row has 'AR30', (blank), 'PRET', '11893', and '5/20/2011'. The twelfth row has 'FLEETC', (blank), 'PRFC', '11851', and '5/20/2011'. The thirteenth row has 'FLEETC', (blank), 'PRFC', '11851', and '5/20/2011'. The fourteenth row has 'FLEETC', (blank), 'PRFC', '11851', and '5/20/2011'. The fifteenth row has 'FLEETC', (blank), 'PRFC', '11851', and '5/20/2011'. The sixteenth row has 'CASH', (blank), 'PRFCV', '11150', and '5/20/2011'. The seventeenth row has 'FLEETC', (blank), 'PRFC', '11851', and '5/20/2011'. The eighteenth row has 'AR30', (blank), 'PINT', '&PLD', and '5/20/2011'. The nineteenth row has 'AR30', (blank), 'PRET', '10639', and '5/20/2011'. On the right side of the interface, there is a vertical sidebar with icons for 'Vehicles' and 'Employees'.

Trmid	PaymentStatus	SlsTypId	CusId	DateCreate
CASH		PRET	12117	5/23/2011
PPLINK	Pending	PRET	11060	5/23/2011
AR30		PRET	10739	5/23/2011
FLEETC		PRFCV	10563	5/23/2011
FLEETC		PRFC	11851	5/23/2011
CASH		PRFC	11851	5/23/2011
FLEETC		PRFCV	11158	5/23/2011
FLEETC		PRFC	11851	5/23/2011
FLEETC		PRFC	10662	5/21/2011
AR30		PRET	10312	5/20/2011
AR30		PRET	11893	5/20/2011
FLEETC		PRFC	11851	5/20/2011
FLEETC		PRFC	11851	5/20/2011
FLEETC		PRFC	11851	5/20/2011
FLEETC		PRFC	11851	5/20/2011
CASH		PRFCV	11150	5/20/2011
FLEETC		PRFC	11851	5/20/2011
AR30		PINT	&PLD	5/20/2011
AR30		PRET	10639	5/20/2011

2.4 | Cash payment

Payments Product Guide

1. Open the order in Excede.
2. Set the **Terms** to Cash.

Important

If you choose an AR , NET, FLEET, or other "billing" term, the **Payments** dialog will **not** open and the customer will **not** be able to pay at the terminal reader.

If you choose one of the term codes that begin with PP, like PPCARD, and the customer pays by a different method, the **TrmId** changes after posting to show the actual payment method.

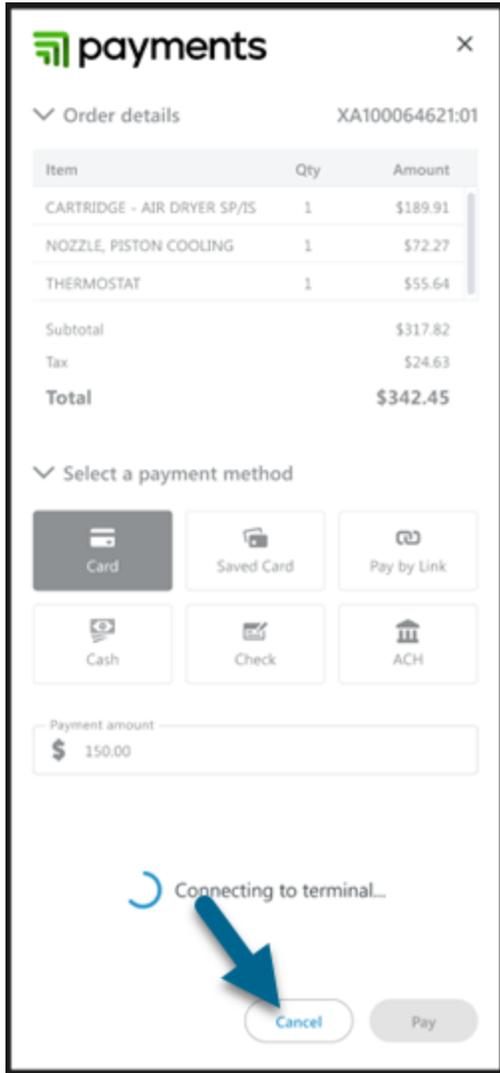
3. Select **Post Direct (Ctrl+T)**.
4. The **Payments** dialog appears on the right side of the screen.
5. Review the order information. To adjust the items on the order, select the **X** in the upper right corner, make your changes, and then repeat the previous steps.
6. Select **Cash** as the payment method.
7. In the **Payment Amount** field, you can either:
 - a. Leave the amount owed as-is.
 - b. Enter the total cash given to you by the customer so Payments can calculate the change due.
8. Select **Pay**.

Note

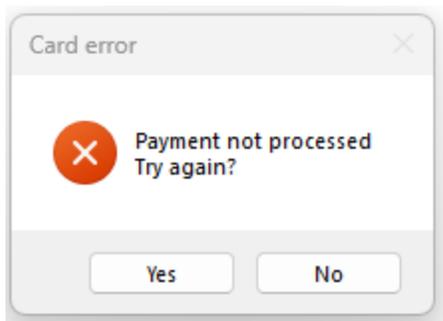
Need to cancel the transaction now?

To cancel a transaction after you select **Pay** on the **Payments** dialog but before the customer presents a card or signs at the terminal reader:

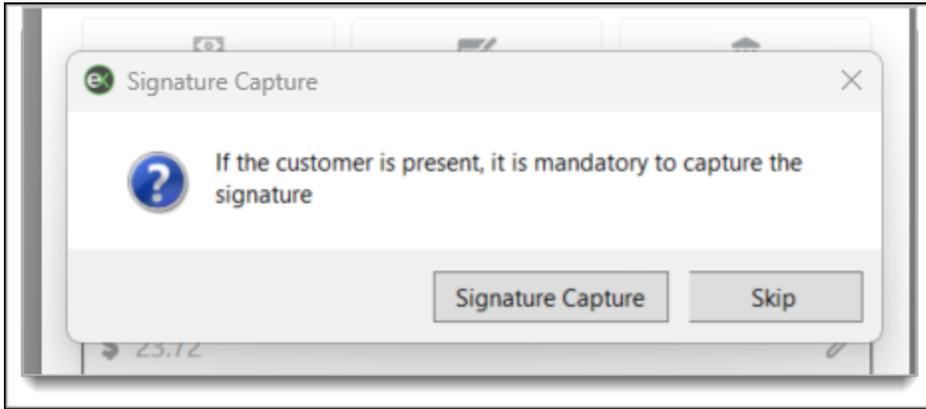
1. Select **Cancel** at the bottom of the **Payments** dialog.



2. Select No when prompted to try again.



9. You are prompted to capture the customer's signature (default) or skip this step. Follow your dealership's rules for cash payments.



10. If you didn't skip the signature, the terminal reader prompts the customer to sign the screen.
11. The **Payments** dialog shows *Transaction Successful!* If you overwrote the **Payment Amount** with the total cash from the customer, it will also show the change due.
12. Close the **Payments** dialog.

Note

You cannot cancel a cash transaction after closing the **Payments** dialog. You can still refund the purchase.

Order information in Excede

How far along is the transaction?	Status	TrmId	PaymentStatus
Customer paid	Invoiced	PPCASH	None

See the process

This animation shows the steps in Excede, not at the terminal reader.

Payments Product Guide


Post Direct Post


Field Chooser Layout


Print


Print Preview


List Print


List Preview


Forms


Help (F1) Help

mld	PaymentStatus	SlstypId	CusId	DateCreate
ASH		PRFC	11851	5/23/2011
ASH		PRFCV	11150	5/20/2011
ASH		PRET	10707	5/18/2011
ASH		PRET	15267	5/23/2011
ASH		PRET	17347	5/23/2011
ASH		PRET	15695	5/20/2011
ASH		PRET	10707	5/19/2011
CASH		PRET	CASH	6/24/2024
CASH		PRET	CASH	6/24/2024
CASH		PRET	CASH	6/17/2024
CASH		PRET	CASH	6/4/2024
CASH		PRET	10028	5/23/2024
ASH		PRET	CASH	5/23/2024
CASH		PRET	CASH	5/22/2024
CASH		PRET	CASH	5/21/2024
ASH		PRET	CASH	5/17/2024
ASH		PRET	CASH	5/17/2024
ASH		PRET	10142	10/28/2011
ASH		PRET	10061	10/25/2011

Selected: 1 Item(s) \$13.70
Total: 500 Item(s) \$166,521.66

2.5 | Check payment

1. Open the order in Excede.
2. Set the **Terms** to Cash.

Important

If you choose an AR , NET, FLEET, or other "billing" term, the **Payments** dialog will **not** open and the customer will **not** be able to pay at the terminal reader.

If you choose one of the term codes that begin with PP, like PPCARD, and the customer pays by a different method, the **TrmId** changes after posting to show the actual payment method.

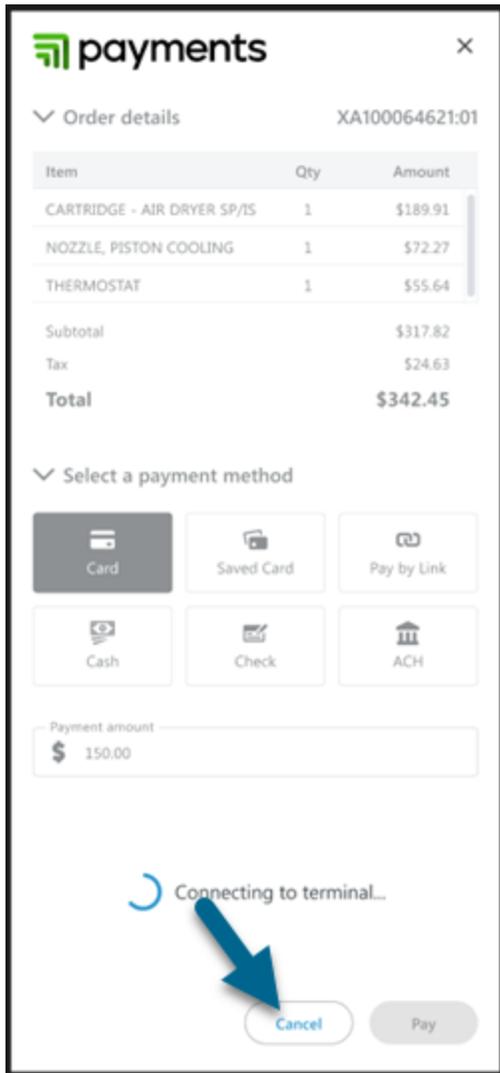
3. Select **Post Direct (Ctrl+T)**.
4. The **Payments** dialog appears on the right side of the screen.
5. Review the order information. To adjust the items on the order, select the **X** in the upper right corner, make your changes, and then repeat the previous steps.
6. Select **Check** as the payment method.
7. Enter the **Check Number**.
8. Select **Pay**.

Note

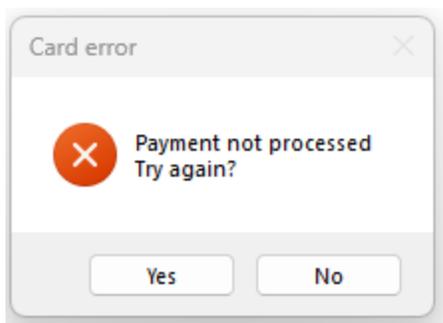
Need to cancel the transaction now?

To cancel a transaction after you select **Pay** on the **Payments** dialog but before the customer presents a card or signs at the terminal reader:

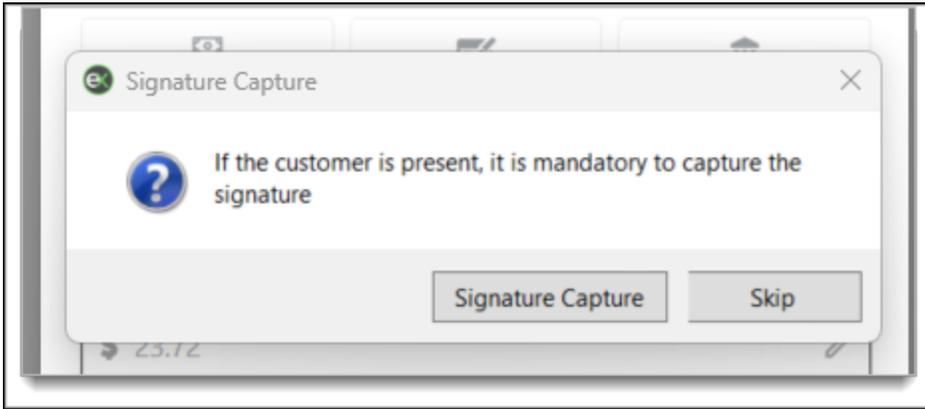
1. Select **Cancel** at the bottom of the **Payments** dialog.



2. Select No when prompted to try again.



9. You are prompted to capture the customer's signature (default) or skip this step. Follow your dealership's rules for check payments.



- 10. If you didn't skip the signature, the reader prompts the customer to sign the screen.
- 11. The **Payments** dialog shows *Transaction Successful!*
- 12. Close the **Payments** dialog.

Note

You cannot cancel a check transaction after closing the **Payments** dialog. You can still refund the purchase.

Order information in Excede

How far along is the transaction?	Status	TrmId	PaymentStatus
Customer paid	Invoiced	PPCHCK	None

See the process

This animation shows the steps in Excede, not at the terminal reader.

Payments Product Guide

Create Notes
 Post Direct
 Field Chooser
Layout
 Print
 Print Preview
 List Print
 List Preview
 Forms
 Help (F1)
Help

TrmId	PaymentStatus	SlcTypId	CusId	DateCreate
cash	X			
CASH		PRFC	11851	5/23/2011
PPCASH		PRFCV	11150	5/20/2011
CASH		PRET	10707	5/18/2011
CASH		PRET	15267	5/23/2011
CASH		PRET	17347	5/23/2011
CASH		PRET	15695	5/20/2011
CASH		PRET	10707	5/19/2011
PPCASH		PRET	CASH	6/24/2024
PPCASH		PRET	CASH	6/24/2024
PPCASH		PRET	CASH	6/17/2024
PPCASH		PRET	CASH	6/4/2024
PPCASH		PRET	10028	5/23/2024
CASH		PRET	CASH	5/23/2024
PPCASH		PRET	CASH	5/22/2024
PPCASH		PRET	CASH	5/21/2024
CASH		PRET	CASH	5/17/2024
CASH		PRET	CASH	5/17/2024
CASH		PRET	10142	10/28/2011
CASH		PRET	10061	10/25/2011

Selected: 1 Item(s) \$48.00 Total: 500 Item(s) \$166,521.66

Vehicles
 Employees

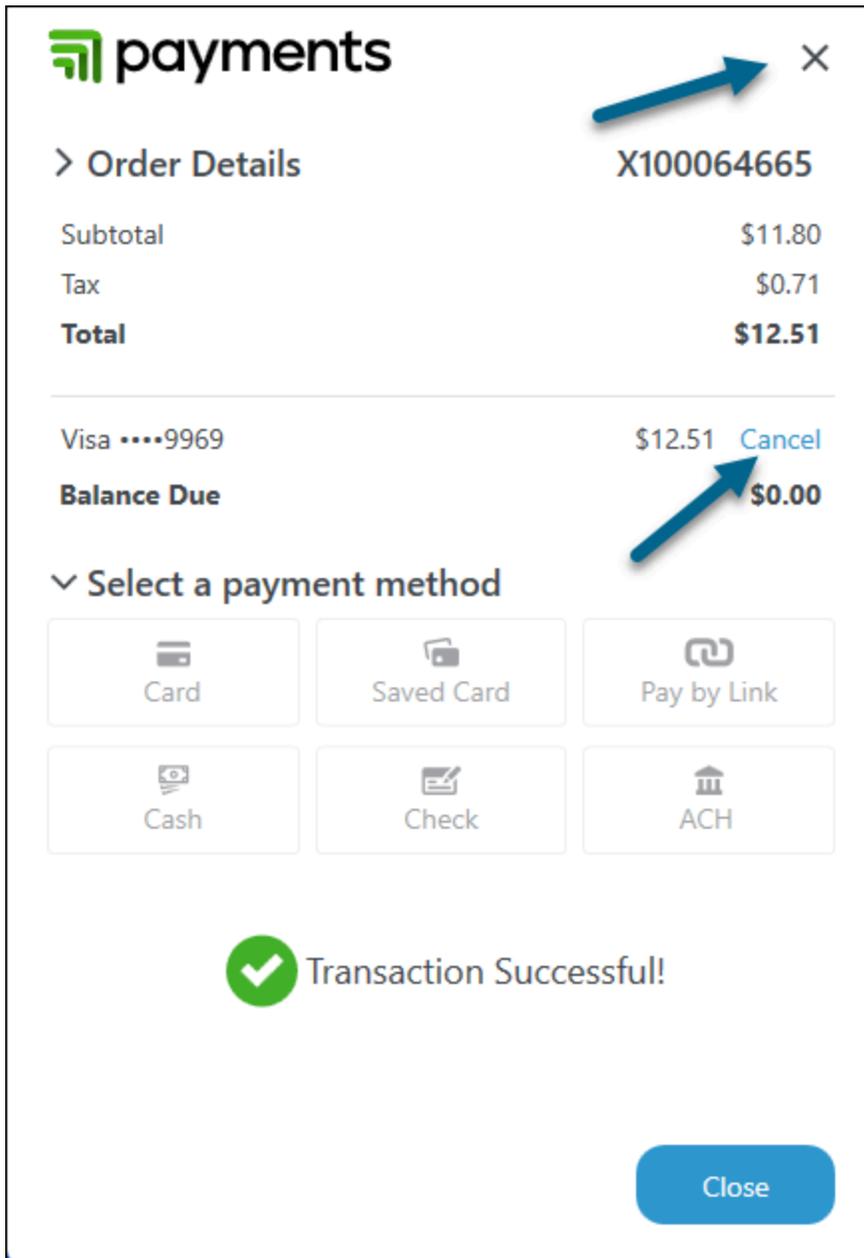
2.6 | ACH payment

The ACH payment method is enabled only if the customer's bank account information has been added in the Stripe portal. This information is **not** saved to the customer record in Excede.

Note

You can cancel successful or pending transactions by:

- selecting the **Cancel** link next to the payment amount on the **Payments** dialog.
- selecting the x in the top right corner of the **Payments** dialog.



If you already closed the **Payments** dialog, post the order again to open it.

Payments Product Guide

1. Open the order in Excede.
2. Set the **Terms** to Cash.

Important

If you choose an AR , NET, FLEET, or other "billing" term, the **Payments** dialog will **not** open and the customer will **not** be able to pay at the terminal reader.

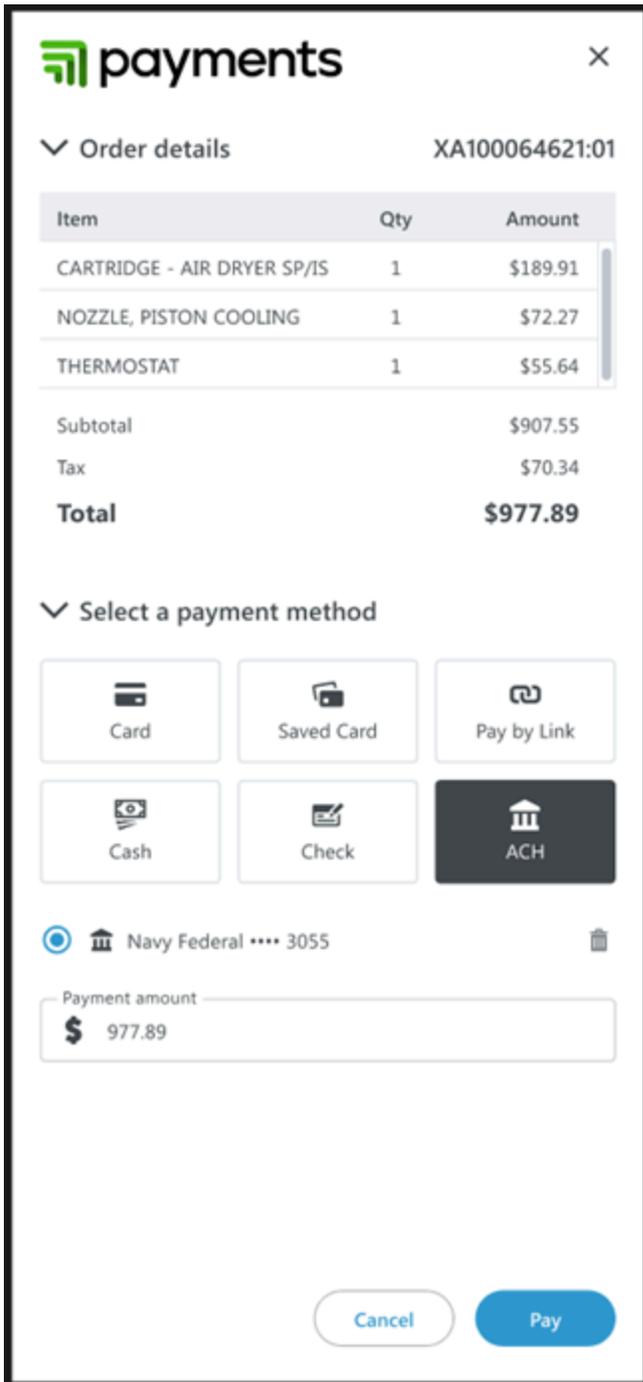
If you choose one of the term codes that begin with PP, like PPCARD, and the customer pays by a different method, the **TrmId** changes after posting to show the actual payment method.

3. Select **Post Direct (Ctrl+T)**.
4. The **Payments** dialog appears on the right side of the screen.
5. Review the order information. To adjust the items on the order, select the **X** in the upper right corner, make your changes, and then repeat the previous steps.
6. Select **ACH** as the payment method.

Note

If the customer wants to pay by ACH but the option is not enabled on the **Payments** dialog, your accounting / customer service team must setup the bank account information in the Stripe portal. You can't configure this payment method from Excede.

7. The **Payments** dialog shows the saved bank information, including the last four digits of the account number.
 - a. Customers with multiple bank accounts set up in the Stripe portal can choose which one to use.
 - b. You can delete  a saved account. Be sure to confirm with the customer before doing so.
8. Select **Pay**.



9. The **Payments** dialog shows *Transaction Started!*

10. You can **Close** the **Payments** dialog while you wait for the payment to be confirmed. This step usually takes a few minutes, during which the **PaymentStatus** of the order = *Pending*.

11. The **PaymentStatus** automatically changes from *Invoiced* to blank and the order's **Status** changes to *Invoiced*. You may need to refresh the screen in Excede to see this change.

Order information in Excede

How far along is the transaction?	Status	TrmId	PaymentStatus
Waiting for bank approval	Invoiced	PPACH	Pending
Bank approved transaction	Invoiced	PPACH	None
Bank rejected transaction	Open	PPACH	Failed
See https://docs.stripe.com/declines/codes#stripe-decline-codes for a comprehensive explanation of the decline codes you may see.			
Transaction canceled in Excede after payment made	Open	PPACH	None

See the process

This animation shows the steps in Excede, not at the terminal reader.

Payments Product Guide

The screenshot displays a software interface with a menu bar at the top. The menu items are: 'Post Direct Post', 'Field Chooser Layout', 'Print', 'Print Preview Print', 'List Print', 'List Preview', 'Forms', and 'Help (F1) Help'. Below the menu bar is a table with the following columns: 'TrmId', 'PaymentStatus', 'SlcTypId', 'CusId', 'DateCreate', and 'Cu'. The first row of the table is highlighted in blue and contains the values: 'CASH', 'PRET', '10111', '6/25/2024', and 'AL'. On the right side of the interface, there is a vertical sidebar with icons for 'Vehicles' and 'Employees'. At the bottom of the interface, a dark bar displays the summary: 'Selected: 1 Item(s) \$142.97 Total: 1 Item(s) \$142.97'.

TrmId	PaymentStatus	SlcTypId	CusId	DateCreate	Cu
CASH	PRET	10111	6/25/2024	AL	

Selected: 1 Item(s) \$142.97 Total: 1 Item(s) \$142.97

2.7 | Split payment

Customers can split the total amount due between multiple payment methods. For example, a customer might pay \$200 in cash and put the rest of the bill on a credit or debit card.

Customers can also split a payment between more than one card, including saved cards.

1. Open the order in Excede.
2. Set the **Terms** to Cash.

Important

If you choose an AR , NET, FLEET, or other "billing" term, the **Payments** dialog will **not** open and the customer will **not** be able to pay at the terminal reader.

If you choose one of the term codes that begin with PP, like PPCARD, and the customer pays by a different method, the **TrmId** changes after posting to show the actual payment method.

3. Select **Post Direct (Ctrl+T)**.
4. The **Payments** dialog appears on the right side of the screen.
5. Review the order information. To adjust the items on the order, select the **X** in the upper right corner, make your changes, and then repeat the previous steps.
6. Choose the first payment method.
7. Change the **Payment Amount**.

Note

Each **Payment Amount** must be at least .50 cents.

8. Select **Pay**.
9. The customer completes the first payment at the terminal reader, unless you selected ACH or Pay by Link. These methods are not often used for splitting payments.
10. The **Balance Due** on the **Payments** dialog automatically changes to show the remaining balance.

✕

> Order Details X100064670

Subtotal	\$474.24
Tax	\$0.00
Total	\$474.24

Visa ****9969 \$100.00 [Cancel](#)

Balance Due **\$374.24**

∨ Select a payment method



Card



Saved Card



Pay by Link



Cash



Check



ACH

 Transaction Successful!

Select another payment method above.

Pay

11. Repeat the steps above until the entire order amount has been paid.

Note

You cannot cancel a split transaction that included a cash or check payment after closing the **Payments** dialog. You can still refund these purchases.

Order information in Excede

How far along is the transaction?	Status	TrmId	PaymentStatus
Approved transaction.	Invoiced	PPSP	None
Transaction canceled in after payment made.	Open	PPSP	None

2.8 | Pay Later

You can post a cash order without receiving the payment but still collect it later via the Payments application, rather than through "net" payment terms.

1. **Post** the order.
2. Select **Cash** as the payment method.
3. Select **Pay Later**.
4. Select **Pay**.



Order Details

X100064672

Item	Qty	Amount
100B/BG607	3	\$28.44
Subtotal		\$28.44
Tax		\$1.71
Total		\$30.15

Select a payment method

Payment method selection grid:

- Card
- Saved Card
- Pay by Link
- Cash** (highlighted with a blue circle containing the number 2)
- Check
- ACH

Payment Amount: \$ 30.15

Pay Later



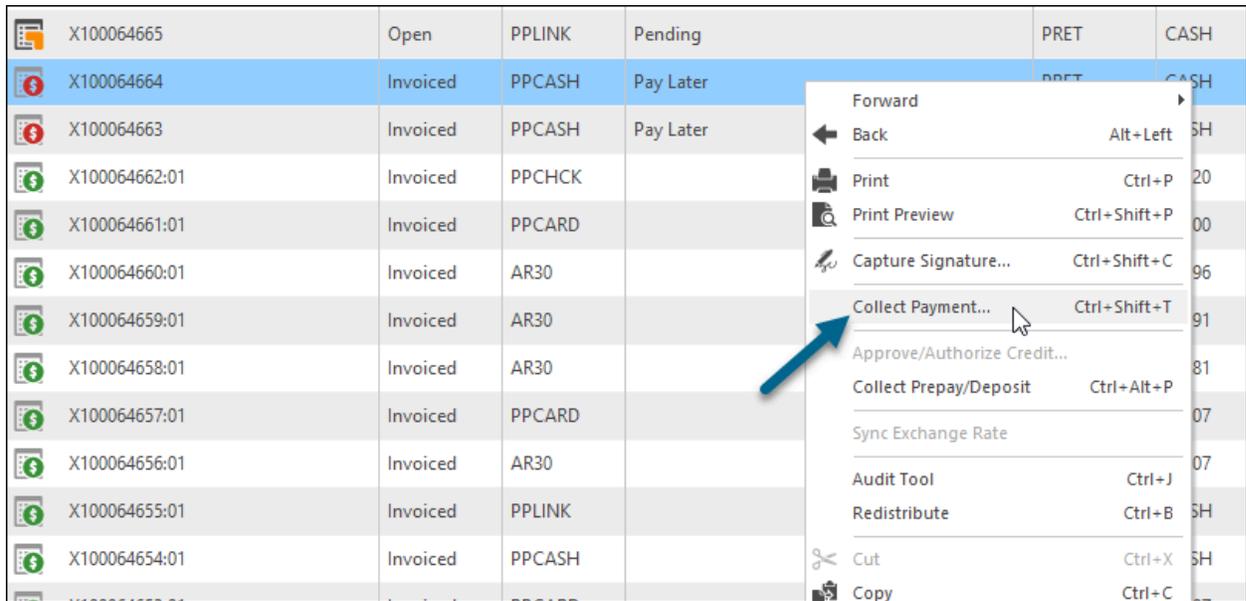
Cancel

Pay



Payments Product Guide

- 5. Close the **Payments** dialog.
- 6. The order posts with a PaymentStatus of *Pay Later*.
- 7. When the customer is ready to pay, right-click the order and select **Collect Payment**.



X100064665	Open	PPLINK	Pending	PRET	CASH
X100064664	Invoiced	PPCASH	Pay Later	PRET	CASH
X100064663	Invoiced	PPCASH	Pay Later		
X100064662:01	Invoiced	PPCHCK			
X100064661:01	Invoiced	PPCARD			
X100064660:01	Invoiced	AR30			
X100064659:01	Invoiced	AR30			
X100064658:01	Invoiced	AR30			
X100064657:01	Invoiced	PPCARD			
X100064656:01	Invoiced	AR30			
X100064655:01	Invoiced	PPLINK			
X100064654:01	Invoiced	PPCASH			

- 8. On the **Payments** dialog, select **Cancel** to the right of the (Pay Later) indicator.



Order Details

X100064664

Item	Qty	Amount
100D/ZBL3500054	1	\$138.33
Subtotal		\$138.33
Tax		\$8.30
Total		\$146.63

CASH (Pay Later) \$146.63 [Cancel](#)
Balance Due  **\$0.00**

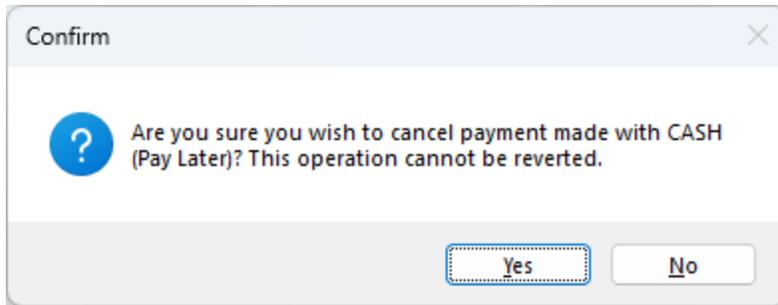
Select a payment method

- Card
- Saved Card
- Pay by Link
- Cash
- Check
- ACH

 Transaction Successful!

Close

9. Confirm your decision.



10. Select a new payment method and complete the transaction:

- a. Card
- b. Saved card
- c. Pay by Link
- d. ACH
- e. Cash
- f. Check

2.9 | Cancel payments after closing the Payments dialog

You can cancel orders with a `PaymentStatus` of `Pending` or `Pay Later`. The steps to cancel depend on the `PaymentStatus`.

Cancel a Pending order

Pending transactions are typically `Pay by Link` payments that the customer has not yet completed or `ACH` payments that have not been approved by the customer's bank.

1. Find an order with a `PaymentStatus = Pending`.
2. **Post** the order.
3. On the **Payments** dialog, select the **Cancel** link next to the payment method and amount.

The screenshot displays the 'payments' interface in 'TEST MODE 1.0.0.30'. It features a 'payments' logo and a close button. The main section is titled 'Order Details' with order ID 'X100064519'. A table lists items: '100N/2006137C1' (Qty: 12, Amount: \$48.12) and 'FRT' (Qty: 1, Amount: \$5.00). Below the table, a summary shows Subtotal (\$53.12), Tax (\$0.00), and Total (\$53.12). A blue arrow points to the 'Cancel' link next to the 'Pay by Link' option, which is set for \$53.12. The 'Balance Due' is \$0.00. The 'Select a payment method' section includes buttons for Card, Saved Card, Pay by Link (selected), Cash, Check, and ACH. At the bottom, there are input fields for 'Payment Amount' (set to \$ 0.00) and 'Name' (MICHAEL MILES), along with 'Cancel' and 'Close' buttons.

Item	Qty	Amount
100N/2006137C1	12	\$48.12
FRT	1	\$5.00
Subtotal		\$53.12
Tax		\$0.00
Total		\$53.12

Pay by Link (jnold@procedesoftware.com) \$53.12 [Cancel](#)

Balance Due **\$0.00**

Select a payment method

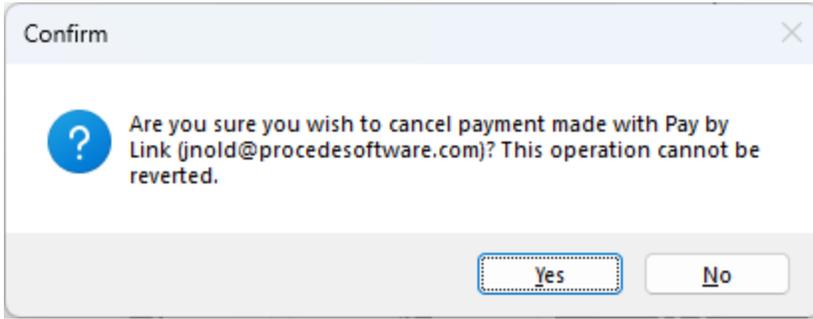
- Card
- Saved Card
- Pay by Link**
- Cash
- Check
- ACH

Payment Amount: \$ 0.00

Name: MICHAEL MILES

[Cancel](#) [Close](#)

4. Confirm your decision.



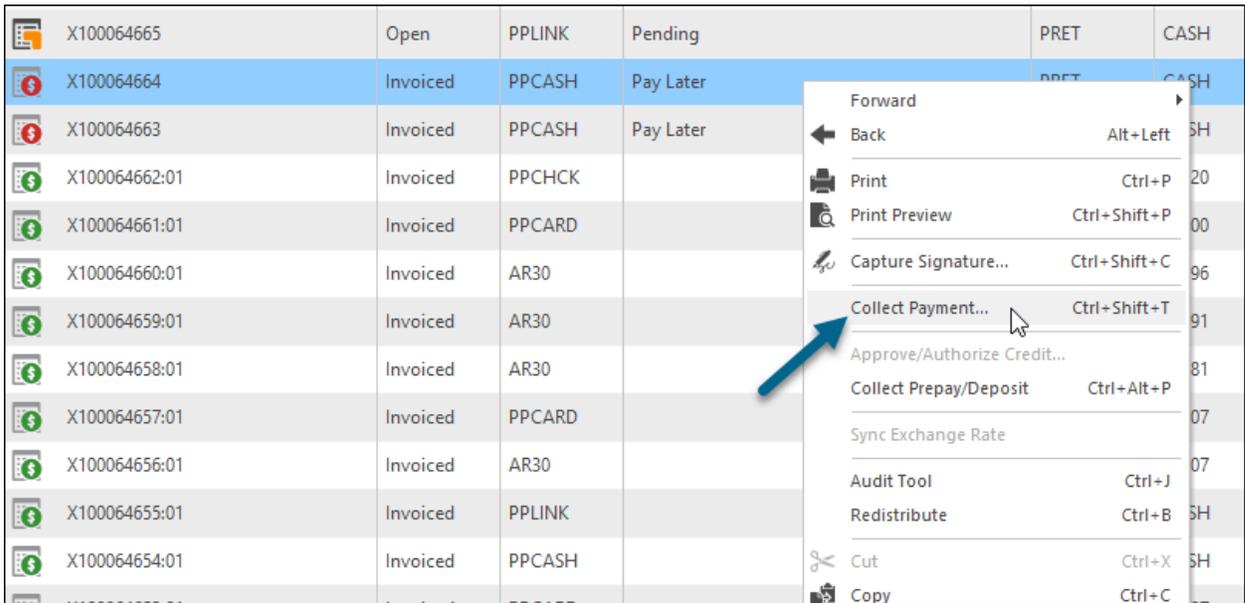
5. You can select a new payment method or select the X at the top right corner to close the Payments dialog.

Note

If the customer doesn't pay by a new method, the **TrmId** remains the same as it was before you cancelled the order. However, the **PaymentStatus** will no longer be *Pending*.

Cancel a Pay Later order

1. Right-click the order and select **Collect Payment**.



2. On the Payments dialog, select **Cancel** to the right of the (Pay Later) indicator.



Order Details

X100064664

Item	Qty	Amount
100D/ZBL3500054	1	\$138.33
Subtotal		\$138.33
Tax		\$8.30
Total		\$146.63

CASH (Pay Later) \$146.63 [Cancel](#)
Balance Due  **\$0.00**

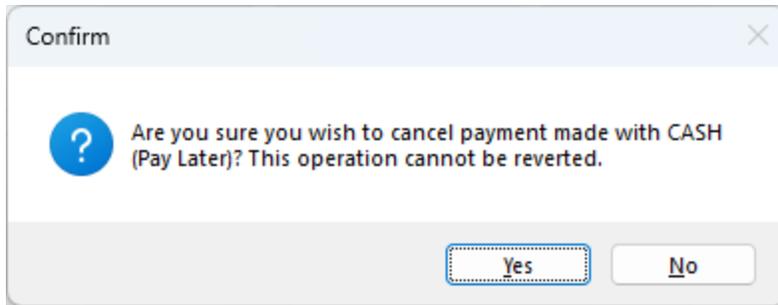
Select a payment method

- Card
- Saved Card
- Pay by Link
- Cash
- Check
- ACH

 Transaction Successful!

Close

3. Confirm your decision.



4. You can select a new payment method or **Close** the **Payments** dialog.

2.10 | Decline codes

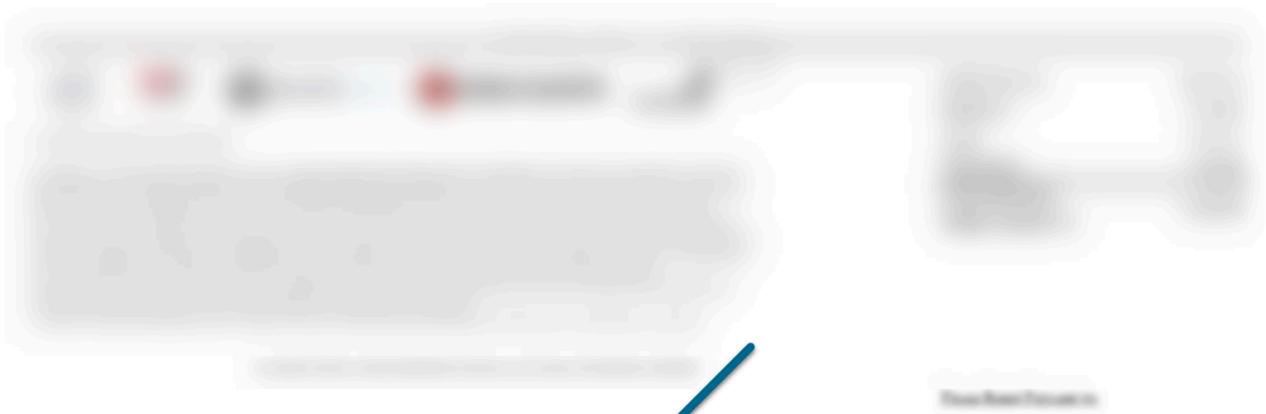
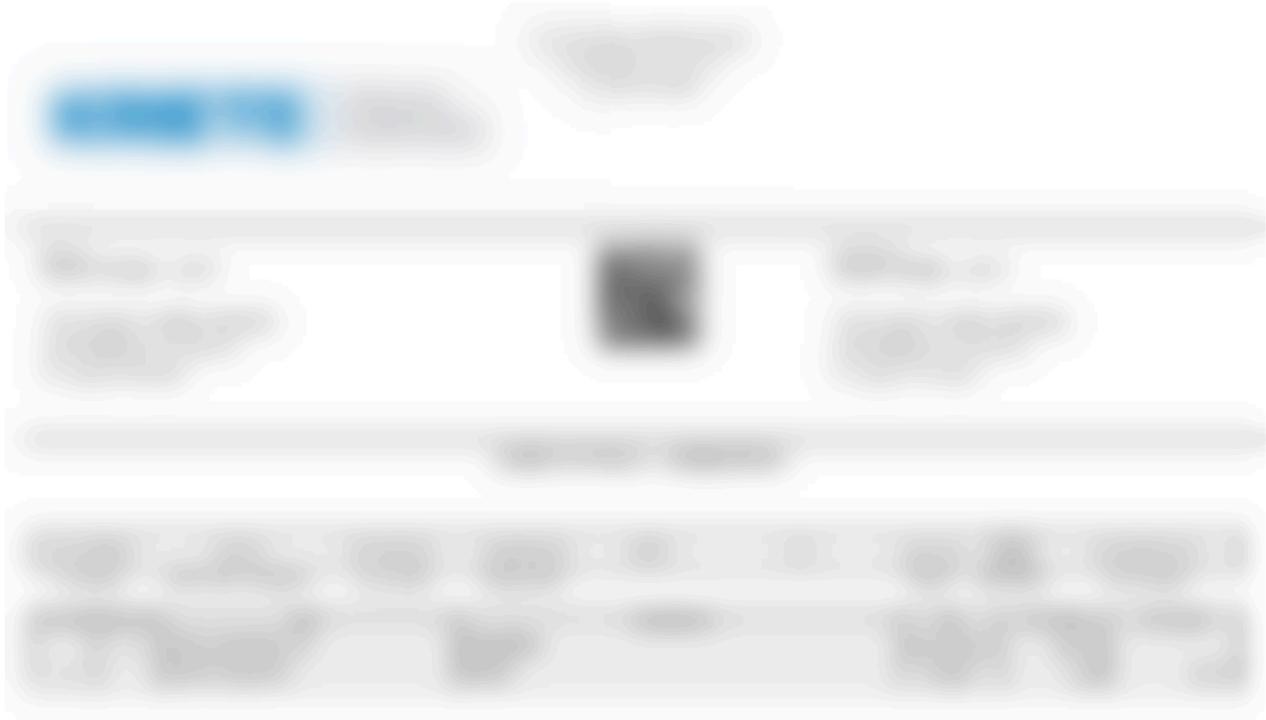
A decline code is typically a two-digit, alphanumeric error code that indicates a reason for the decline. While the code can originate from a number of sources, it often comes from the issuing bank, payment processor, or credit network.

See <https://docs.stripe.com/declines/codes#stripe-decline-codes> for a comprehensive explanation of the codes you may see.

2.11 | View signature

Excede saves images of customer signatures to C:\PRO\IMG by default. This directory can be changed.

Excede inserts the image onto the **Signature** line of the form(s) printed after the order posts:



SIGNATURE X

Stephen Maturin

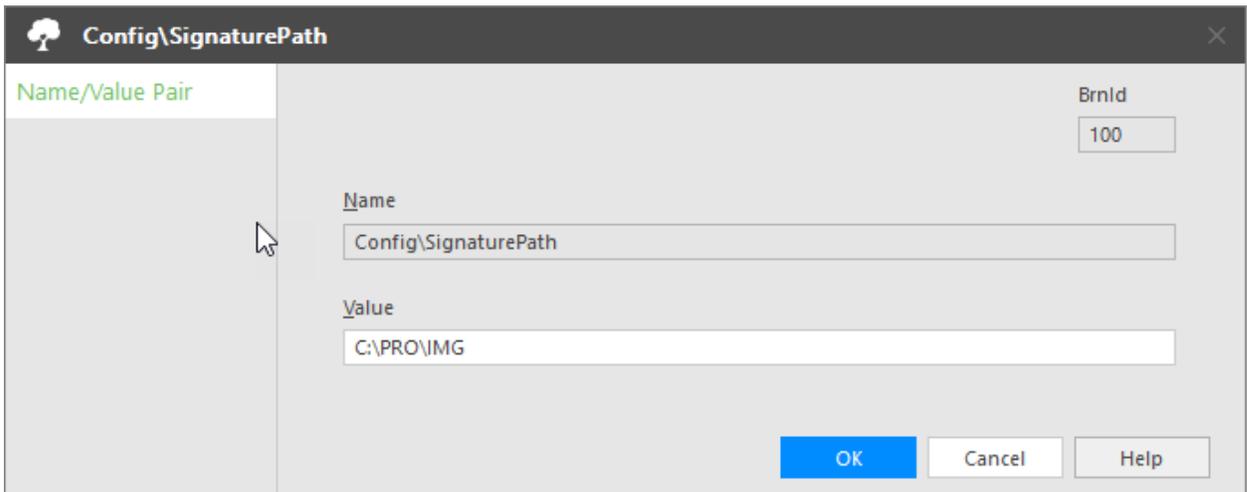
Page 1 of 2

Excede then automatically deletes signature files after printing the form(s).

Change the signature image storage directory

You must have appropriate workspace permissions to modify the Branch Communication Settings.

1. In Excede, select **Company | Items | Branches**.
2. Drill into the **branch**.
3. Drill into **Procede Pay**.
4. Open **ItmId 5427, Config\SignaturePath**.
5. In the **Value** field, change the **directory** and select **OK**.



3 | Signature Capture

Terminal readers can collect digital signatures for any unposted document in Excede, including those that do not involve Payments.

3.1 | Automatic Signature Capture rules for Payments transaction

Signature Capture is always enabled for some Payments transactions and can be enabled by Branch Communication Settings (BCS) for others.

Card

Signature Capture is automatically enabled for these transactions and will always display the signature screen on the terminal.

Saved card, cash, or check

1. Enable Signature Capture via the branch communication setting.
2. The Signature Capture message will appear when you select these payment methods on the **Payments** dialog in Excede:
 - a. Saved card
 - b. Cash
 - c. Check
3. If you select **Signature Capture**, the terminal reader prompts the customer for a signature.

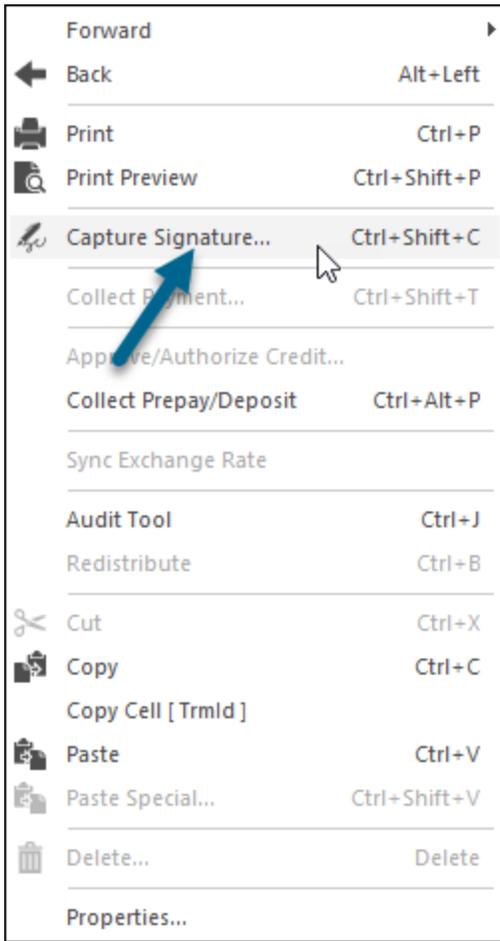
Pay by Link and ACH

1. Enable Signature Capture for these payment methods via the Branch Communication Setting.
2. You will not be prompted to collect a signature from the **Payments** dialog, but you can right-click the order and select **Capture Signature**.
3. The terminal reader prompts the customer to sign.

3.2 | Signature Capture for unposted documents

You can use the terminal reader to capture a signature for any unposted document, including those that do not involve Payments.

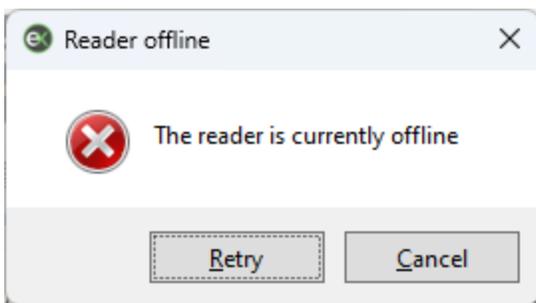
Right-click the document in Excede and select **Capture Signature**. The terminal reader prompts the customer for a signature.



4 | Troubleshooting

4.1 | Terminal reader offline

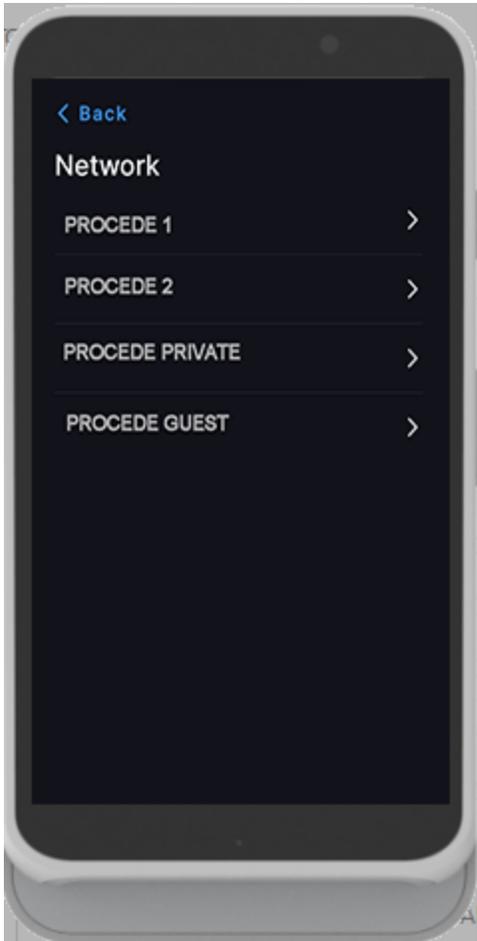
Payments shows *The reader is currently offline* when the terminal for your work area loses its WiFi connection.



Note

This message does not appear until you post a transaction that launches Payments.

1. Offline terminals automatically show a list of available networks. Pick one.



2. When the device connects successfully, your dealership logo appears on the terminal reader.
3. Continue with the transaction on the **Payments** dialog.

4.2 | Switch terminal readers

If a terminal reader stops working for a reason other than losing connectivity, you can take payments from a different device.

The "replacement" terminal reader doesn't need to be located near your workstation — you can switch to any device at your branch.

1. **Post** a transaction that launches Payments.
2. On the **Payments** dialog, select **Card** as the payment method.
3. Select **Settings**.

Note

No payment method other than **Card** lets you access the **Settings**.

4. Choose an *online* terminal reader and select **Save**.

Tip

We recommend that dealerships format the **Reader label** as <branch-department-last 3 digits of the serial # found on back of the device>.

For example, 102-Service-804.



TEST MODE 1.0.0.30



Order Details

X100064608

Item	Qty	Amount
100X/SPLASH	1	\$1.80
100N/XSMA2124692FC2	2	\$84.12
100N/XSMA2124692FC2-CORE	2	\$48.00
Subtotal		\$133.92
Tax		\$0.00
Total		\$133.92

Select a payment method

Payment method selection buttons: Card (selected), Saved Card, Pay by Link, Cash, Check, ACH.

Readers for location HQ (tml_FdUoyQzM7VmKr8)

- 102-Accounting-258 online
- 102-Counter 1-369 online
- 102-Counter 2-471 online
- 102-Reception-582 online
- 102-Service-616 online
- 102-Vehicles-724 online

Cancel

Save

5. The customer can complete the transaction at the "replacement" terminal reader.

5 | Refunds

Important

Only transactions originally created by Payments can be refunded through Payments.

Check with your manager for guidance on refunding payments made through other Point of Sale systems.

1. Reverse the purchase in Excede.
 - a. Copy and paste the order.
 - b. Confirm that you want to reverse the order and enter a reason, like "Refund to customer."
 - c. See the Excede help for detailed instructions on reversing orders.
2. **Post** the reversed order.
3. The **Payments** dialog shows the original payment method and the **Refund amount**.

Note

If the original payment was split between multiple methods, see the Refund a split payment instructions.

4. Select **Refund**.

**TEST MODE** 1.0.0.30 ✕

▼ Order Details X100064611

Item	Qty	Amount
100D/TLD50845	-2	\$-0.98

Subtotal \$-0.98

Tax \$-0.06

Total **\$-1.04**

Visa ••••9969 \$1.04 Cancel

Balance Due **\$1.04**

▼ Select a payment method



Card



Saved Card



Pay by Link



Cash



Check



ACH

Refund amount - CARD VISA 9969
\$ -1.04 ✎

Cancel

Refund

Payments Product Guide

5. The customer does not need to sign or present a card at the terminal reader.
6. The **Payments** dialog shows:
 - a. original payment amount and method.
 - b. refunded amount and payment method.
 - c. *Transaction Successful!* message.
7. Close the **Payments** dialog.

Order information in Excede

How far along is the transaction?	Status	TrmId
Customer paid	Invoiced	Varies by payment method.
Refund successful	Invoiced	Same as original Payments term code.

5.1 | Refund a split payment

Important

Only transactions originally made through Payments can be refunded through Payments.

Check with your manager for guidance on refunding payments made through other point-of-sale systems or via purchase orders.

1. Reverse the **purchase** in .
 1. Copy and paste the **order**.
 2. Confirm that you want to reverse the order and enter a **reason**, like "Refund to customer."

See the documentation for detailed instructions on reversing orders.
2. **Post** the reversed order.
3. The **Payments** dialog shows all the original payment methods.
 - a. By default, any **Card** or **Saved Card** payment will be selected first.

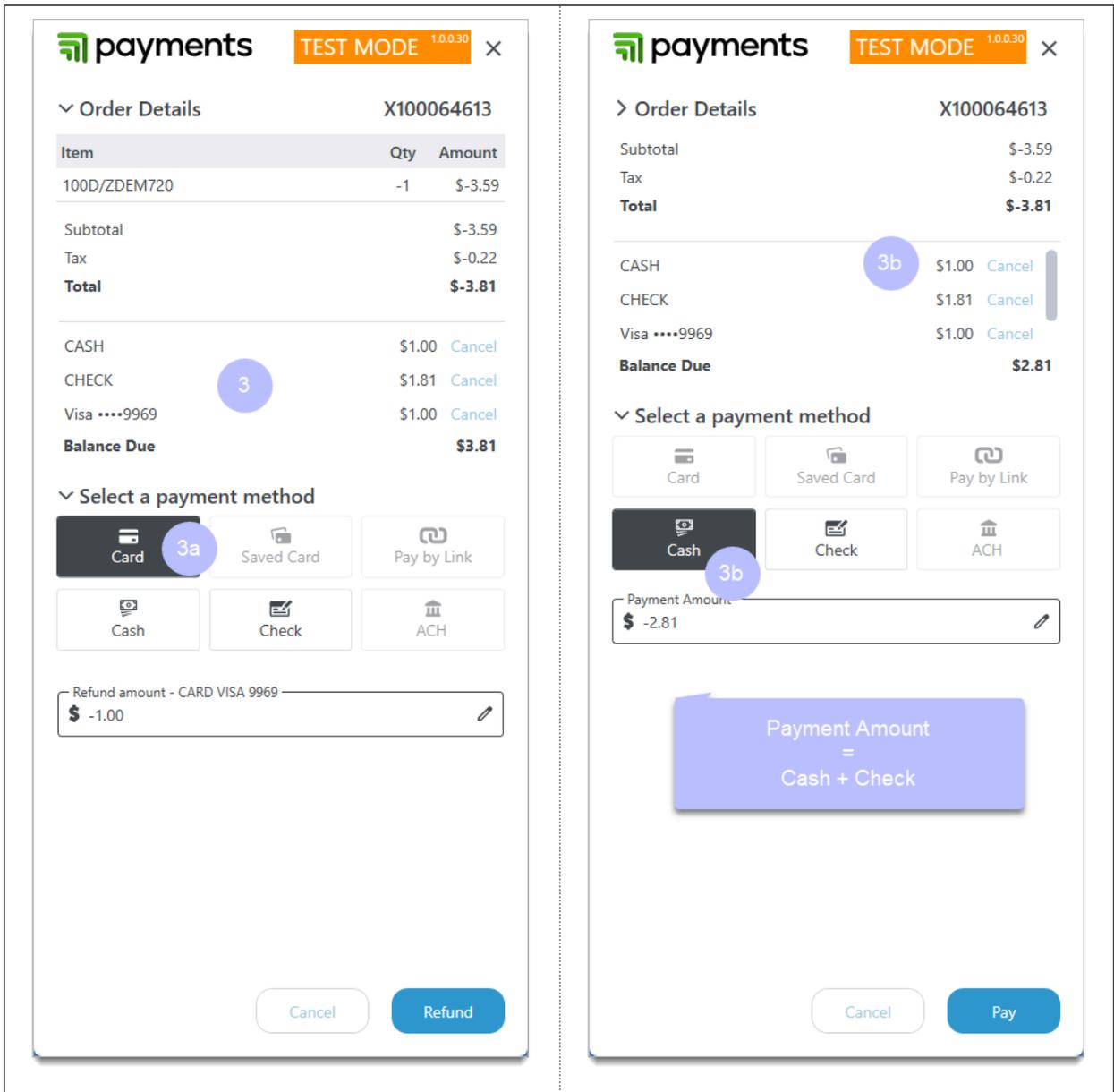
Payments Product Guide

b. **Cash** and **Check** payments are refunded to the customer as cash. If the original payment included both, selecting either **Cash** or **Check** will show a **Payment Amount** equal to the total of both values.

4. Select **Refund**. This button changes to **Pay** if you are refunding a **Cash** or **Check** payment.

Note

The customer does not need to sign or present a card at the reader.



5. The **Payments** dialog shows:

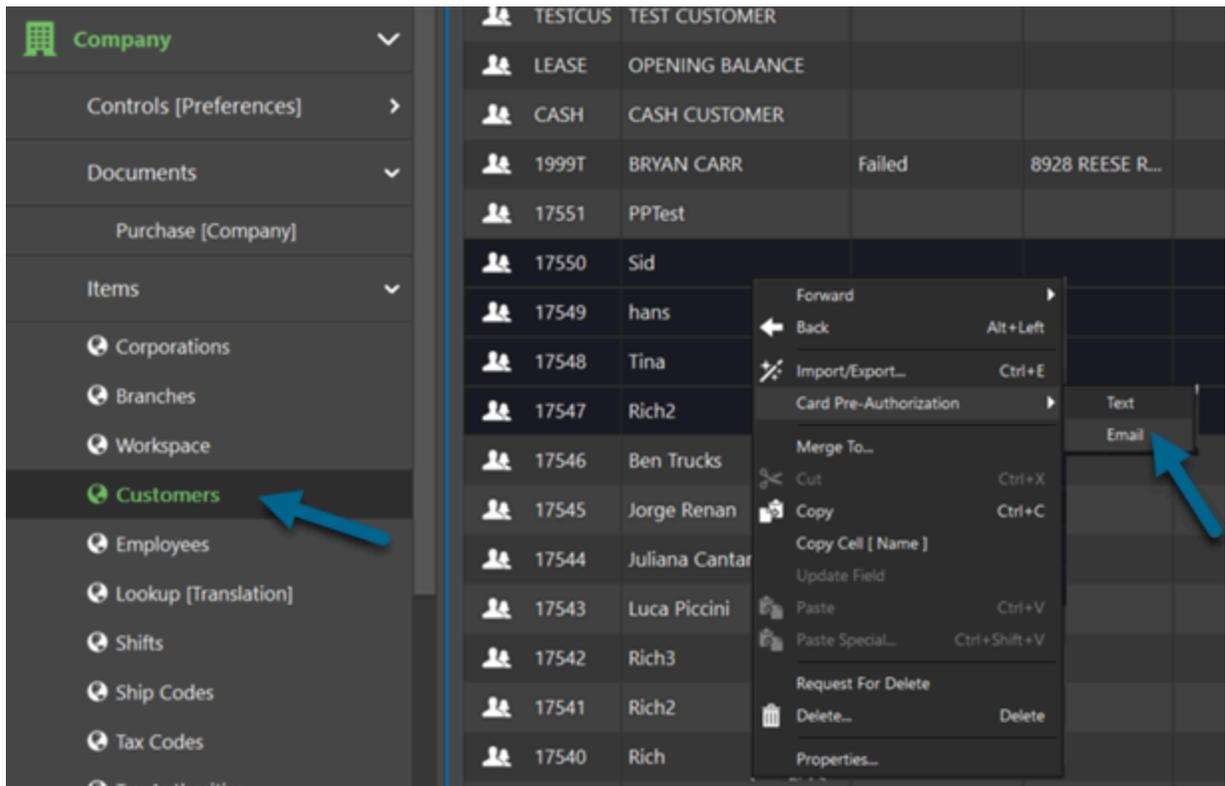
1. The original payment amounts and methods (positive values).
2. The refunded amounts and payment methods (negative values).

- 3. The *Transaction Successful!* message.
- 6. Close the Payments dialog.

6 | Pre-authorization

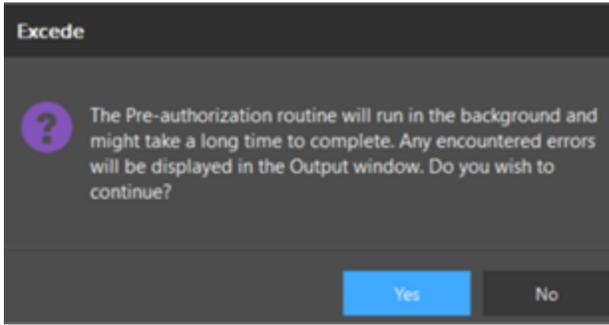
You can add payment information to the customer record to expedite the checkout process.

- 1. In Excede, go to **Company | Items | Customers**.
- 2. Define the customers suitable for pre-authorization.
- 3. Select one or more customers, right-click, and select **Card Pre-Authorization**.
- 4. Select **Text** or **Email**.



- 5. When prompted, select **Yes** to start the pre-authorization process.

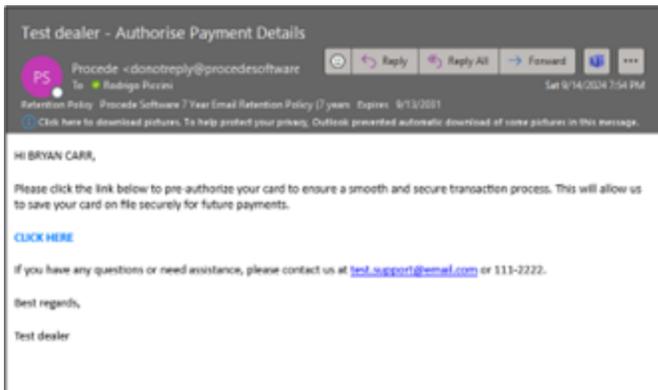
Payments Product Guide



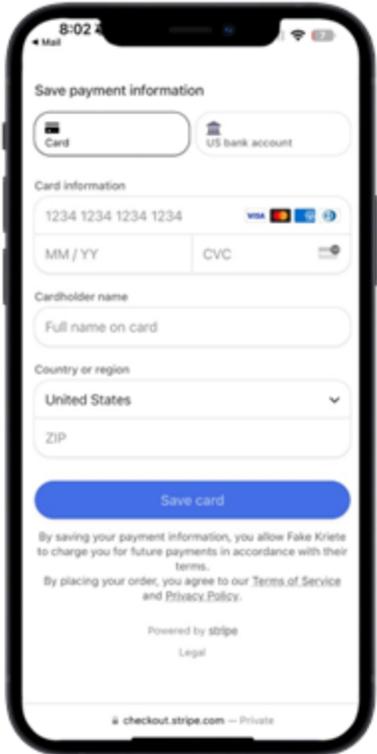
6. A pre-defined Miscellaneous field tracks the pre-authorization status. In the following example, the CusMiscDes10 field shows the status of the pre-authorization process for seven customers.

CusId	Name	CusMiscDes10
1999T	BRYAN CARR	Failed
17539	cosmin	Failed
17524	Mickey Rourke	Failed
17507	KARL MENDOZA	Failed
17506	TONY MATTHEWS	Failed
17544	Juliana Cantarelli	Completed
TESTCUS	TEST CUSTOMER	Requested

7. The customer receives an email or text notification with a link and instructions.



8. Customers who want to use the pre-authorization feature select the link and enter their payment information.



9. Customers can use their pre-authorized card payment when paying by saved card or by link.

7 | Auto-reconciliation

The Reconciliation application easily reconciles Stripe credit card bank payouts and Excede orders. It can identify duplicates and looks for new payouts.

1. The application runs automatically at a time that you define.
2. The application pulls Stripe bank payouts.

Amount	Bank/card	Arrive by
\$8.33 USD Paid	Bank of America **** 6789	Sep 19
\$141.37 USD Paid	Bank of America **** 6789	Sep 18
\$1,094.28 USD Paid	Bank of America **** 6789	Sep 17

3. The application consumes the payout and creates an Excede deposit under Accounting | Documents | Deposits.

The screenshot shows a software interface with a navigation menu on the left and a table of deposit transactions on the right. The navigation menu includes options like Accounting, Documents, Journal Entries, Disbursements, Debit/Credit Memos, Deposits (highlighted), Receipts, and Unauthorized Credit. The table on the right displays a list of transactions with columns for DepId, Des, DepT..., BnkId, and BnkName.

DepId	Des	DepT...	BnkId	BnkName
W100003545	po_1PoxVNH1ob8TQjQ6SRPT3rX7	AA	IBA	IBA BANK
W100003544	po_1PnsF8H1ob8TQjQ6AbERdKn1	AA	IBA	IBA BANK
W100003543	po_1PnVbGH1ob8TQjQ6EE7sLrEF	AA	IBA	IBA BANK
W100003542	po_1PqPO8H1ob8TQjQ68hN4okxY	AA	IBA	IBA BANK
W100003537	po_1Pn9CHH1ob8TQjQ62rnfky4	AA	IBA	IBA BANK
W100003536	po_1Pmme9H1ob8TQjQ6JfOuyIa0	AA	IBA	IBA BANK
W100003535	po_1PknH1ob8TQjQ6E3Q8EDQi	AA	IBA	IBA BANK

- The deposit header parameters are pre-defined via branch communication settings.
- The line items follow automatic accounting rules that are applied to the general ledger for Cash-In-Transit and Cash-On-Hand transactions.

8 | Frequently Asked Questions

The Payments dialog didn't open

When you expect the **Payments** dialog to appear and it doesn't, it usually means the **Term** for the order was billable, such as NET30, instead of an "immediate" option like Cash.

We recommend that you choose Cash as the **Term** for orders that will be paid for through Payments.

Note

Many customers will be set up for Accounts Receivable terms by default.

For the most accurate customer records, you should select an actual customer when creating an order, but you must select a Cash or PP- prefix **Term** to use Payments.

How many methods can a customer use to pay for an order?

Customers can split a payment between as many methods as they want. However, each payment amount must be at least \$0.50 cents.

Why did the Payments dialog open for an order with no amount due?

For any order with an immediate payment **Term** (Cash or any of the PP- prefix choices), the **Payments** dialog automatically opens when posted, even when there is no charge.

Be careful not to accidentally post \$0.00 cost orders, since they will be marked as *Invoiced* and cannot be edited.

Payments Product Guide

Does the **PaymentStatus** automatically update for ACH and Pay by Link?

Yes. The **PaymentStatus** automatically changes from *Pending* to blank, and the **Status** changes to *Invoiced*. You may need to refresh the screen in to see this change.

If the payment has not been made yet, the **Payments** dialog shows a **Payment Amount** of \$0.00 and no status message.

You can cancel a pending payment if needed.

Can I tell if the customer paid through a saved card?

Not in Excede. The **TrmId** for both **Saved Card** and **Card** payments = PPCARD.

You can identify saved card transactions in the Stripe portal.

Can I see a picture of a customer signature?

Before Excede prints the forms associated with the order, signature image files are saved to C:\PRO\IMG by default. This directory can be changed.

The image is added to the printed forms on the **Signature** line. The image file is then deleted from the storage folder.

9 | Contact support

Procede Software

[Click here for instructions.](#)

Stripe

If you have any questions about Stripe's applications, products, or sites, you can receive 24/7 assistance via the Stripe Support site at <https://support.stripe.com/>. From here, you can either contact support or browse the support articles for guidance.

Common support articles include:

- **Stripe onboarding** (What does this error on the Stripe Onboarding page mean?)
- **Stripe dashboard** (Where do I find this item in the dashboard?)
- **Stripe terminal orders** (I have a question about my order.)
- **Stripe product questions** (What is Stripe Radar?)
- **Stripe funds flow** (Where are my payouts?)

