# **Payment Gateway - Order Time Pay**

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#### Sign up to learn more and compare rates

Order Time Pay is the premier payment gateway for Order Time Inventory. Process credit card payments with ease via Sales Order, Ship Doc, send payment request emails, and process credit cards via our B2B Portal.

It features a customizable receipt feature and a built in merchant portal to track all of your payment transactions. One click from the Order Time platform will take you to the portal to handle your payments!

#### **Current Features**

- Process Credit Card payments from Sales Orders and Ship Docs
- Process ACH Payments from Sales Orders and Ship Docs
- Payment Request Emails for Credit Card
- Payment Request Emails for ACH
- Payment Request Email Receipt Feature with Customizable fields
- B2B Portal Credit Card Payments & Processing
- B2B Portal ACH Payments & Processing
- Built-in merchant portal to track your payments, payment volume, voids, and refunds
- Order Time Pay Canada
- Payment Method Management
- New preferences to limit the maximum Payment Methods

#### **Upcoming Features**

- Payment Request Info Templates
- The ability to generate a Payment Request link with the tap of a button
- Terminal connections for Magtek terminals and others with swipe, tap, and chip capabilities

• Competitive rates provided via proposal.

# Sign Up for Order Time Pay

If you are an Order Time Customer already you will have an Order Time Merchant account ready to go. If you are looking to get Order Time Inventory with Order Time Pay, sign up below to learn more and compare your rates vs your current payment provider.



Sign up to learn more and compare rates

## Setting up Order Time Pay

Make sure to sign up for Order Time Pay above.

We will get statements from you so that we can build your proposal. Once you have accepted the proposal we will add your Merchant key to the backend of Order Time.

Then we will reach out to you in order to set up the gateway.

Admin + Profile Lists + Pay	ment Gateway			
Payment Gateway				Save
Active Status		OT Pay		
Active      Inactive (	Both	Name	OT Pay	
Records	•	Active	2	
Main Gateway	0	Is default		
OT Pay	0			
States.	0	Default Transaction Type	Sale	× ·
	•	Default Payment Method	Credit Card	*
T. 10		Gateway Type	Order Time Pay	×
Total Records: 4				
			Order Time PAY.	

- Head to Admin > Profile Lists > Payment Gateway after support has setup your gateway to check the settings
- The Gateway will have already been created by our support agents.
- You can rename it how you would like, we recommend setting it to Is Default
- Choose your default Transaction Type whether it be Authorize or Sale
  - Sale should be chosen in MOST situations
    - **SALE** As soon as a payment is saved, the card is swiped.
    - **AUTHORIZE** You must go to the payments individually and click the **Capture** button for each one. This is used when payments must be approved.

General	
Customer	
Payment Method Credit Card	
Date 4/8/2025	
Memo	
Check / Ref # SO-3104693	
Deposit Account Cash on hand	
A/R Account	

- You can also get to the Capture button by clicking the edit button on the payment line within the payments tab on the document it is applied to, like the Sales Order or Ship Doc

Payment Method	Credit Card	~	Amount Due	4.49	
Date	4/8/2025	1.1.1 1.1.1	Amount	200.00	
Memo			Payment Gateway	OT Pay	
			Unapplied	0.00	
Check / Ref #	SO-3104693				
Deposit Account	Cash on hand	*			
A/R Account		~			

- Select a Default Payment Method, usually Credit Card
- For ACH, make sure the checkbox to activate ACH/eChecks is checked

### **ACH Questions**

How do I turn on ACH with Order Time Pay?

- Head to Admin > Profile Lists > Payment Gateway after support has setup your gateway to check the settings
- Make sure the checkbox to activate ACH/eChecks is checked

What is the default limit for ACH transactions?

• The default is set to \$600, however this limit is easily modified by requesting a limit change during underwriting or reaching out to the support team: payments.accountsupport@fullsteam.com

How do I increase the ACH transaction max amount limit for my Order Time Pay account?

• Submit statements to the FS Account Support team to raise the amount: payments.accountsupport@fullsteam.com

# **Setting Up the Receipt Fields**

dmin 👂 Company Info		
ompany Info		Save
General		Address
Add Logo		Name/Company Street Floor/Suite City State/Prox/Reg. Zip/Possal Code Country
Phone	- (MA) (MC) - (M	Email Addresses
Fax Website Time Zone Home currency	Ang Taon A Tao Taon Ang Ang Ang Ang Ang Ang Ang Ang Ang An	Email Default from email
Payment Support In	nfo	
Payment Terms		Refund Policy
Shipping Policy		Merchandise Returns Policy
Customer Service Em	///	Customer Service Phone
contact@ordertime	e.com	954-555-5555

- Head to Admin > Company Info
- You will see a new section called Payment Support Info
- Enter or paste your Payment Terms, Refund Policy, Shipping Policy, and Merchandise Returns Policy
- Add your Customer Service Email Address
- Add your Customer Service Phone Number
- Click SAVE at the top-right to lock in your changes

### **Managing Payment Methods**

From the Customer Details Page you are able to:

- Add an OT Payment Method
- Manage existing OT Payment Methods

### **Order Time Pay Payment Screen**

Payment				×
Payment Method	Credit Card 🗸	Amount Due	20.00	
Date	11/7/2024	Amount	20.00	
Memo				_
		Payment Gateway	OT Pay 🗸	
		DISCOVER	VISA 🌔 🥵 🏧	
Check / Ref #	SO-104417	Name on Card		
Deposit Account	Cash on hand 🗸	Credit Card Address		
A/R Account	*	Card Type		
		Credit Card No.		
		Exp. Month	Select 🗸	
		Exp. Year	Select V	
		CVV		
		Credit Card Zip/Postal		
		Country	~	
		Email		
		Transaction Type	Sale 🗸	
		Unapplied	0.00	
		PP		
			Save	

- Order Time Pay can transact with all of the card types listed at the top
- If you have already entered a previous credit card for that Customer you will see a dropdown to use the Card-on-File
- As you enter the CC Number you will see the Card Type displayed for verification purposes
- Transaction Type can be set to Authorize or Sale for your convenience
- Zip and Country must be entered for proper rate calculation

# **Accessing your Merchant Portal**

- Users with a Role that can View Payments (restrict as necessary) are able to see the Order Time Pay banner below your recent records list
- Clicking on this will automatically log you in to your Order Time Merchant Account so that you can view your entire dashboard

Order Time	Search			
🛱 Home - 🛷 Sales -	🐂 Purchasing -	🔅 Production -	🄊 Rentals -	🛷 Repairs - 🛛 📦
Create New 👻	Home			
Open Full List 👻				
Recent Records	< >			
104417				
104424	all-day			
<b>9</b> 22	8am			
<b>o</b> 920				
≓ 121	9am			
NLOT5	10am			
NLOT5	11am			
WHOLE PC				
WHOLE PC	12pm			
Ørder Time PAY	1pm			
. Present ity FOLLSTEAM	2pm	-		
	2			
	Spm			
	4pm			
≡ Single Sign-on MerchantTrack				directoria.
Deshboard				
s Transaction Search Dashboard				
Shortcuts Venual				Stats
Terminals Recent Funding Activity		ansactions		Fotal Transaction Count
Reports View Report	> View Rep	ort	>	\$1,513.92 Last Transaction Date
			· · · · · · · · · · · · · · · · · · ·	11/3/2024 11:13:26 AM CT Last Transaction Merchant
Daily Volumes				Last Transaction Amount
200	numbercruncher.Merchant.1 (US	D)		Last Transaction ID
180				
140				
80				
60 40		$\langle \rangle$		
20				
200410000 200410000 200410000 20041012 20041013 2004101015 20041010 20041010 20041010 20041010	77 2024/10/18 2024/10/22 2024/10/22 2024/10/22 2024/10/22 2024/10/22 2024/10/22 2024/10/22 2024/10/22 2024/10/22 2024/10/22	241028 1021 1028 1028 1029 1029 1029 1029 1029 1029 1029 1029	11103 2024/11/04 2024/11/05 2024/11/05 2024/11/05	

- Within MerchantTrack you can see your dashboard with daily volumes
- You can see your transactional statistics on the right-hand side
- On the left you have links to search for transactions, and create reports
- For now, the terminals section does not apply to our current phase of Order Time Pay



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