How to Create a Credit Card Token

Software Development

RIMSS Business Systems Technology

File   View   Company   Customer   Notes Receivable   CRM   Suppliers   Employees   Payroll   Banking   Fixed Assets   Inventory   Service   Wholegoods   Lease   Rental   Reports   Web Links   Windows   Help

RIMSS WinNetStar | Telephony | Customer List | Customer - Bethany Olson (312580) ×

Save   Save and Close   Save And New

General | Details | Financial | Attachments | User Defined Fields | Purchase Orders | Insurance | Equipment Owned | Notes | Statement Consolidation | Alerts

Sales

Salesperson: [▼]

Grouping and Tax

Customer Type: Retail   ▼
Tax Status: Taxable   ▼
Tax Exemption #: [   ]
Exemption Expiration: [▼]
Tax Group Override: None   ▼

Financial Details

Credit Limit: $0.00
Price Level: List   ▼
Credit Rating: [▼]
Finance Charge Override: 0.00 %   ☐ Exclude from Finance Charges

Account Numbers

[**Add New Account**]

Account Type	Account Code	Account Num	Expiration Date	Account First Name	Account Last Name

Terms

Payment Terms: COD   ▼
☐ Purchase Order Required on Purchases

Discounts

Parts Counter: 0.00 %
Parts on Repair Order: 0.00 %
Labor on Repair Order: 0.00 %
Labor Rate Override: [▼]

Other Options

☐ Include Invoices on Customer Statements
☐ Always Ignore Item Sales History for this Customer
☐ Email Statement   Address: [▼]
☐ Email Note Statement   Address: [▼]

POS Invoice Email Address: [▼]
WG Invoice Email Address: [▼]
Service Invoice Email Address: [▼]
Rental Invoice Email Address: [▼]
Lease Invoice Email Address: [▼]

Promotional Pricing

[Fetch]

Name	Description	Customer Filter Name	Item Filter Name	Pricing Scenario...	Start Date	End Date	Last Modified...	Last Modified...

On the Details tab of the Customer Master, click on "Add New Account".

In the Account Number pop-up window select the down arrow on Account Type and choose ChargeItPro.

RIMSS.WinNetStar v8.0.0.799   Enterprise:Messicks Enterprise   Company:Messick Farm Equipment, Inc. (2)   Location:Elizabethtown (3)

File   View   Company   Customer   Notes Receivable   CRM   Suppliers   Employees   Payroll   Banking   Fixed Assets   Inventory   Service   Wholegoods   Lease   Rental   Reports   Web Links   Windows   Help

RIMSS WinNetStar | Telephony | Customer List | Customer - Bethany Olson (312580) ✕

Save   Save and Close   Save And New

General | Details | Financial | Attachments | User Defined Fields | Purchase Orders | Insurance | Equipment Owned | Notes | Statement Consolidation | Alerts

Sales

Salesperson: [   ]

Grouping and Tax

Customer Type: Retail
Tax Status: Taxable
Tax Exemption #: [   ]
Exemption Expiration: [   ]
Tax Group Override: None

Financial Details

Credit Limit: $0.00
Price Level: List
Credit Rating: [   ]
Finance Charge Override: 0.00 %

Terms

Payment Terms: COD
☐ Purchase Order Required on Purchases

Discoun...

Parts Cou...
Parts on P...
Labor on...
Labor Rat...

Other Options

☐ Include Invoices on Customer Statements
☐ Always Ignore Item Sales History for this Customer
☐ Email Statement

Address: [   ]
Address: [   ]

Account Number

Account Type: ChargeItPro
Account Number: [   ]
Account Code: [   ]
Expiration Date: 12/31/9999

[Ok]
[Cancel]

FreedomPay Parameters

Credit Card First Name: [   ]   [Request Token]
Credit Card Last Name: [   ]
Credit Card Token: [   ]
Credit Card Token Expiration Mo/Year: [0] [0]
Credit Card CVV: [   ]

Select Request token.

DO NOT TYPE IN THE BOX.
(ChangeItPro will fill in the box for you.)

Account Numbers

[Add New Account]

Account Type	Account Code	Account Num	Expiration Date	Account First Name	Account Last Name
❌		❌	12/31/9999		

[Fetch]

Name	Description	Customer Filter Name	Item Filter Name	Pricing Scenario...	Start Date	End Date	Last Modified...	Last Modified...

English (United States) | Client Desktop | User: mbrimss (RIMSS\marybeth) | Role: Administrator | Workstation: RIMSS-MARYBETH | Server: Atlas | Database: WinNetStarApp | Portal: .NET Remoting

Save Credit Card

ChargeItPro

S300-S Active

CARD NUMBER

EXPIRATION (MMYY)   **CVV CODE**

NAME ON CARD

ADDRESS

ZIP

Swipe, Insert, or Manually Enter your credit card now.

This might take a few seconds to process before you get the next window.

Manual Entry

Total Amount $0.00

CANCEL

Save Credit Card

ChargeItPro

Complete

✔ **Transaction Successful**

Amount: 0.00

Approval Number: 171602

Message: Approved

Once the Credit Card Token has been approved, click Close to return to the Customer Master Details tab.

CLOSE

File View Company Customer Notes Receivable CRM Suppliers Emplo... ts Web Links Windows Help

RIMSS WinNetStar | Telephony | Customer List | Customer - Bethany Olson (312180)

Save Save and Close Save And New

General | Details | Financial | Attachments | User Defined Fields | ... | tion | Alerts

DO NOT TYPE IN THE BOX.

Wait until ChargeItPro populates the box for you and then select ok.

Sales

Salesperson:

Terms

Payment Terms: COD

☐ Purchase Order Required on Purchases

Other Options

☐ Include Invoices on Customer Statements

☐ Always Ignore Item Sales History for this Customer

☐ Email Statement   Address

Grouping and Tax

Customer Type: Retail

Tax Status: Taxable

Tax Exemption #:

Exemption Expiration:

Tax Group Override: None

Discounts

Account Number

Account Type: ChargeItPro ▼   Ok

Account Number: Cancel

Account Code:

Expiration Date: 12/31/9999

FreedomPay Parameters

Credit Card First Name:

Credit Card Last Name:

Credit Card Token: Request Token

Credit Card Token Expiration Mo/Year: 0 0

Credit Card CVV:

If the box is blank, just wait for the information to populate.

Account Number

Account Type: ChargeItPro ▼   Ok

Account Number: ***********3184   Cancel

Account Code: Visa

Expiration Date: 6/28/2026 ▼

FreedomPay Parameters

Credit Card First Name: GIFT CARD RE...

Credit Card Last Name: GIFT CARD RECIPIENT

Credit Card Token: 23dc7dc3f4   Request Token

Credit Card Token Expiration Mo/Year: 6 26

Credit Card CVV:

Once populated, click on OK to add the account.

Financial Details

Credit Limit: $0.00

Price Level: List

Credit Rating:

Finance Charge Override: 0.00 %

Account Numbers

Add New Account

Fetch

Account Type	Account Code	Account Num	Expiration Date	Account First Name	Account Last Name		Name	Description	Customer Filter Name	Item Filter Name	Pricing Scenario...	Start Date	End Date	Last Modified...	Last Modified...
► ChargeItPro	Visa	***********3184	6/28/2026	GIFT CARD RECIPIENT	GIFT CARD RECIPIENT										

After verifying the information on the account, click "Save" or "Save and Close" on the top left of the Customer Master.