

XinatorCC

Payment Processing System

USER GUIDE



Xceleran, Inc
Support@Xceleran.com

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Introduction

Welcome to the User Guide for XceleranCC. In this guide we will focus on getting started with the core features and an explanation of optional services. Details on set up and use of those services are in separate documents. In addition to this document, help is available in the video tutorials on the Xceleran YouTube channel and linked in our Support Section, and of course from our support staff via, chat, email, or phone.

To fully utilize all the features of XceleranCC it is necessary to use OpenEdge Payment Processing from Global Payments Integrated (GPI) and QuickBooks Online from Intuit. Additional benefits can be derived from using GPI software, most of which is free or at a nominal cost. If you already have those services or wish to purchase them yourself, we can still provide all functionality. If you would like to arrange for them through Xceleran you get the additional benefits of available discounts and Tier 1 support.

The one option, XceleranCC POS (Point of Sale) App for iOS devices is available in the Apple Store at no additional cost.

NOTE: *Help is available from the “?” icon and Chat feature found on every page.*

Thanks for choosing XceleranCC!

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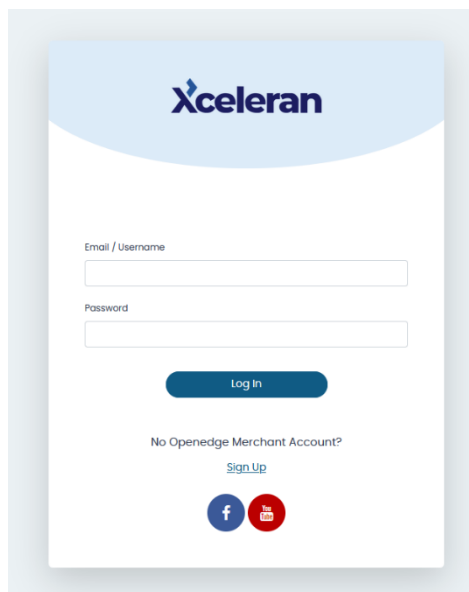
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Chapter 1: Getting Started

Logging into your XceleranCC Dashboard.

From the XceleranCC can be accessed either independently from it's login page <https://paymentportal.xceleran.com/webterminal/msf/Login.aspx> or in conjunction with any of Xceleran's Business Management Software.

To begin enter the login information you were sent in the confirmation email.



The login page features the Xceleran logo at the top. Below it are two input fields labeled 'Email / Username' and 'Password'. A blue 'Log In' button is positioned below the password field. Underneath the button, there is a link for 'No Openedge Merchant Account?' and a 'Sign Up' link. At the bottom, there are social media icons for Facebook and YouTube.



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From here you have access to:

1. Home Screen with YouTube Tutorial
2. Virtual Terminal for Payment Processing and Management
3. QuickBooks Online access
4. Reports
5. Reminders tab to create reminders to customers to complete payments.
6. User Management

Each of these are covered below.

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Chapter 2: Virtual Terminal Payment Processing and Management

Overview – There are 4 tabs across the top, Sales, View Transactions, Recurring Payments, and Batch. Each is reviewed below. In general, this is where you can make manual transactions, see and manage all transactions made here or by remote device, manage refunds and voids, etc.

One important note. No sensitive payment information is stored anywhere in the Virtual Terminal. All information is sent to OpenEdge via strict encryption standards and stored in their systems.

Sales Tab

There are 4 options for processing payments: CC Processing (Credit/Debit Cards); ACH Processing (Bank Deposit using Routing Number and Bank Account); XPayLink (Customer payment link sent by email or text message); and, POS Processing (Computer connected device or XceleranCC POS for iOS).

The screenshot shows the Xceleran Virtual Terminal interface. At the top, there's a header with the Xceleran logo and a user profile (Welcome! Sean Marzola | Logout). Below the header, there are four tabs: Sales, View Transactions, Recurring Payments, and Batch. The Sales tab is active. Under the Sales tab, there are four processing options: CC Processing, ACH Processing, XPayLink, and POS Processing. The CC Processing option is selected and highlighted with an orange box. Below the tabs, there are input fields for Name on Card, Amount, Invoice Number, Address, Zip Code, Email Address, and Reference ID. A Next button is located at the bottom of the form.

CC Processing

CC Processing is used for manually entering credit card information into the appropriate fields in the Virtual Terminal. Only those with an Asterix (*) are required but we advise at least adding zip code. The more information you gather the better for your costs and email is needed if you wish to send receipts.

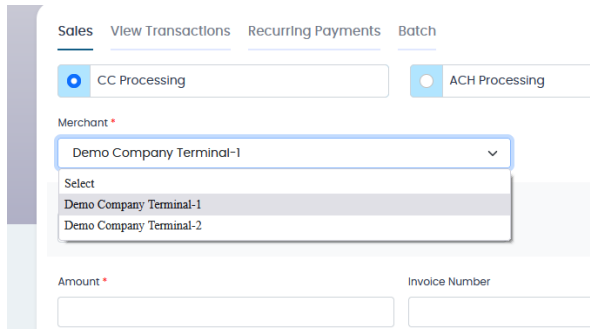
Step 1: Complete basic information and click next.

The screenshot shows the Xceleran Virtual Terminal interface with the Sales tab active. The CC Processing option is selected. The form is filled with sample data: Name on Card (Gary Rowding), Amount (100.00), Invoice Number (1231), Address (123 Elm St), Zip Code (19101), and Email Address (growing@xceleran.com). The Next button is highlighted.

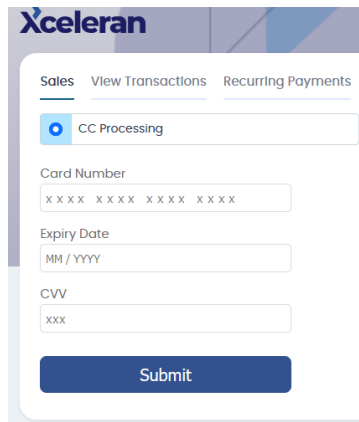
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Step 2. If you have multiple merchant accounts, select the appropriate one for this sale to be associated with.



The screenshot shows the 'Sales' tab selected in the top navigation bar. Below the navigation bar, there are two radio buttons: 'CC Processing' (selected) and 'ACH Processing'. Under the 'Merchant' label, a dropdown menu is open, showing 'Demo Company Terminal-1' as the selected option. Below the dropdown, there are two more options: 'Demo Company Terminal-1' and 'Demo Company Terminal-2'. At the bottom, there are input fields for 'Amount' and 'Invoice Number'.



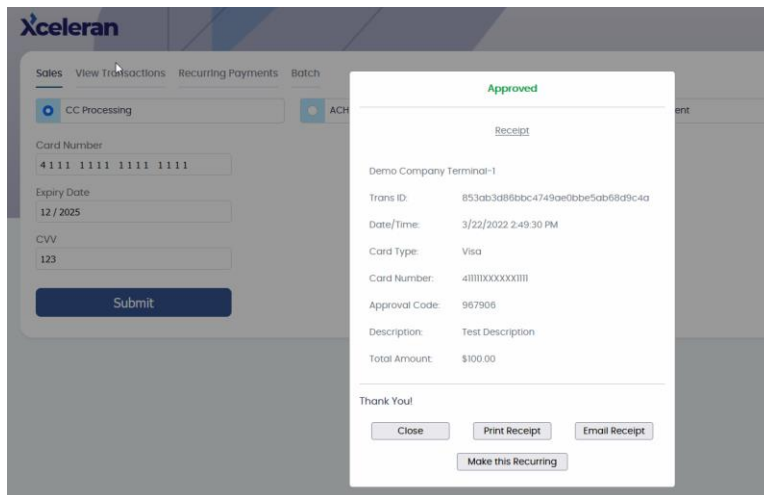
The screenshot shows the 'Sales' tab selected in the top navigation bar. Below the navigation bar, there are two radio buttons: 'CC Processing' (selected) and 'ACH Processing'. Under the 'Card Number' label, there is an input field with a placeholder 'x x x x x x x x x x x x x x x x'. Below the Card Number field, there is an 'Expiry Date' field with a placeholder 'MM / YYYY'. Below the Expiry Date field, there is a 'CVV' field with a placeholder 'xxx'. At the bottom, there is a blue 'Submit' button.

Step 3. Enter the Credit Card Numbers and click Submit.

Step 4. If approved, you will receive confirmation and payment details. This can be Printed, Emailed, or made available for reuse as a Card on File or regularly Recurring Transaction (covered in the Recurring Payments Tab below).

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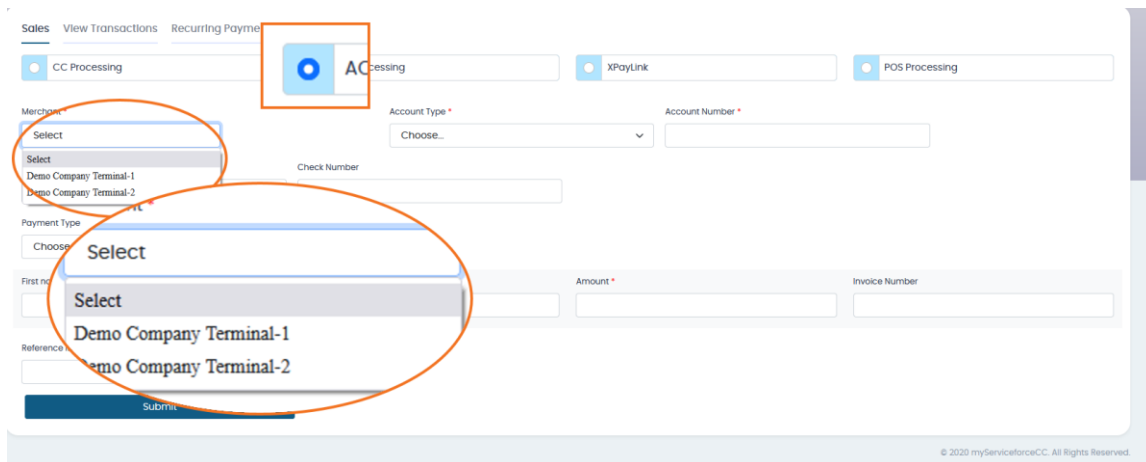
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ACH Processing

ACH means Automated Clearing House and is the banking software that is used to process checks and direct payments to and from a bank account. If you have an ACH agreement with us you can process payments from the bank account number and bank routing number that appear on a customers check. You do not need anything else from the customer to use this method.

Step 1. After Selecting the ACH Processor select the appropriate merchant account if necessary.



Step 2. Select the Account Type, Checking or Savings, and Payment Type; Personal or Business and the complete the remaining fields.

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The screenshot shows the Xceleran payment processing interface. At the top, there is a navigation bar with the Xceleran logo and a 'Welcome!' message. Below the navigation bar, there are tabs for 'Sales', 'View Transactions', 'Recurring Payments', and 'Batch'. Under the 'Sales' tab, there are four radio buttons: 'CC Processing', 'ACH Processing' (which is selected), 'XPayLink', and 'POS Processing'. Below these, there are several input fields: 'Merchant *' (with a 'Select' button), 'Routing Number *', 'Check Number', 'Account Number *', 'Last name *', and 'Invoice Number'. There are two dropdown menus: 'Account Type *' and 'Payment Type'. The 'Account Type' dropdown menu is highlighted with an orange circle and shows a list of options: 'Choose...', 'Checking', and 'Savings'. The 'Payment Type' dropdown menu is also highlighted with an orange circle and shows a list of options: 'Choose...', 'Personal', and 'Business'. There are also orange circles around the 'Choose...' options in both dropdown menus.

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XPayLink Processing

Use this when you want to send your customer a link in email or SMS text which when clicked takes them to a secure payment site hosted by GPI OpenEdge. Optionally, it can also be used to give a consumer financing options. For more information [CLICK HERE](#).

Like the other options, required fields are marked with an asterix. An email address is required. If a mobile number is added a SMS/text message will also be sent. If by email you can add files to it. (Note: if integrated with QBO and you want the QBO invoice to accompany the payment link use the process in the QBO tab (see below for details)).

Customization of the XPaylink is available so that it conforms to your brand. See Appendix B for details.

POS Processing

POS (Point of sale) is used to do card in hand transactions. To use this option you will need either the XceleranCC iOS app or a Windows computer and a POS device. While you are able to use a standard printer for receipts, you may also want to get a receipt printer as well. For more information on POS devices and thermal receipt printers contact support at support@xceleran.com or click a chat link.

SETUP

Once you have the POS device, you must go through the setup process before using it. The POS device will plug directly into your computer via the connected USB cable. To set it up, follow the steps below.

1. Connect the POS device to the computer. Wait for the screen to say “Ready” before moving to step 2. This may take a few minutes and the POS device may make some different sounds and power off and on at least once.

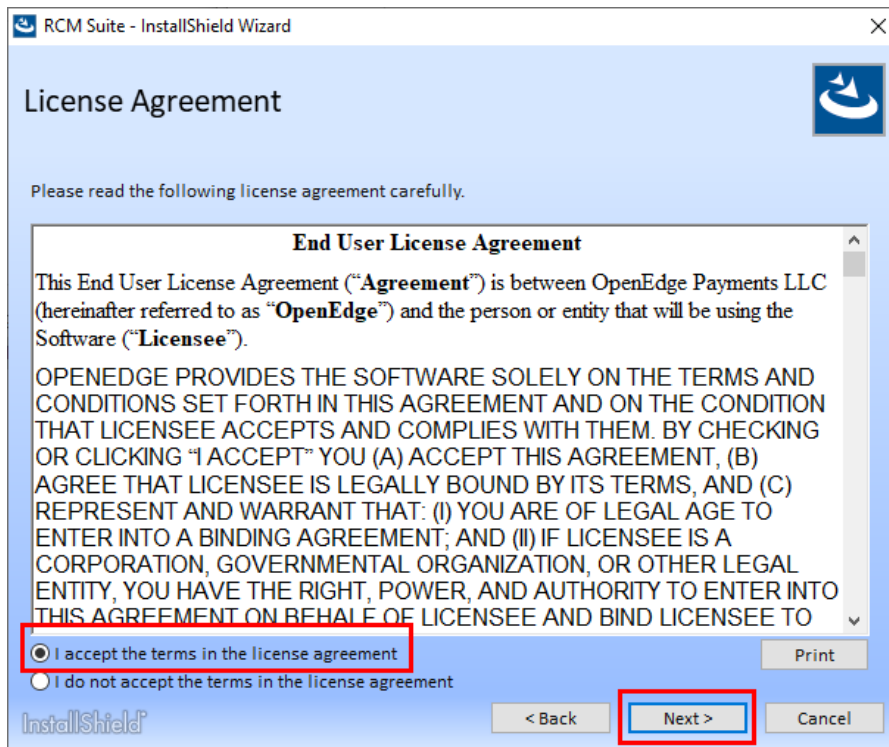
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2. Download the Remote Client Manager (RCM) software by clicking on the following link. Please note that when you click on the link the file will automatically begin to download. Depending on your browser and browser settings, you may be prompted to take some sort of action before the file may be downloaded.

https://www.x-charge.com/downloads/files/RCM%20Windows_GA.exe

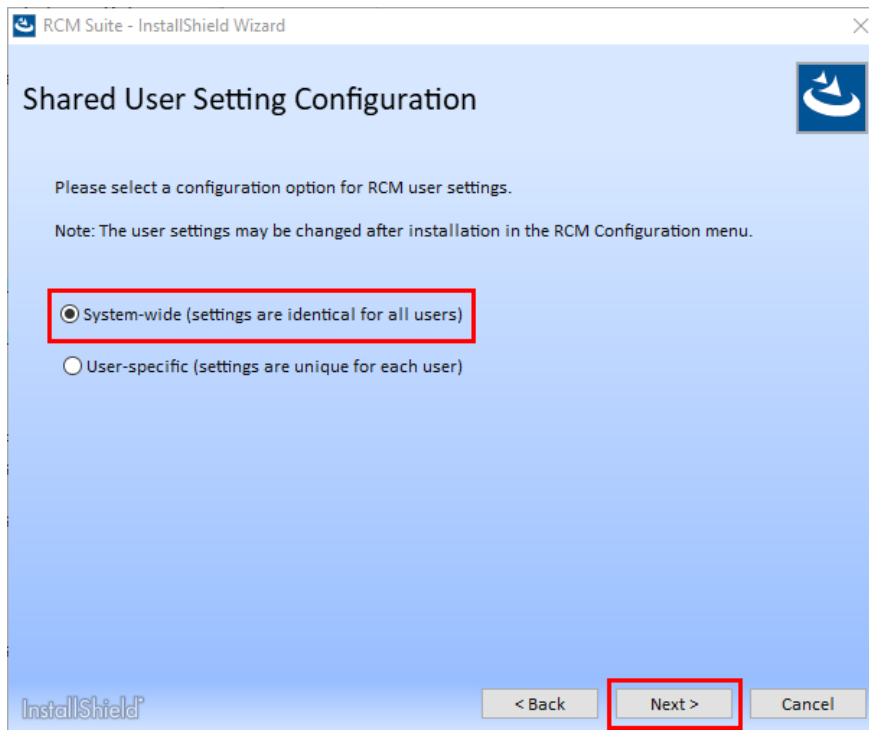
3. Locate the downloaded file (RCM Windows_GA.exe or similar) and double-click on it to run the setup program. If you see a window that asks if you want to allow the app to make changes to your device, click **Yes**.
4. Next you may see a License Agreement. If so, select "I accept the terms in the license agreement" and click **Next**.



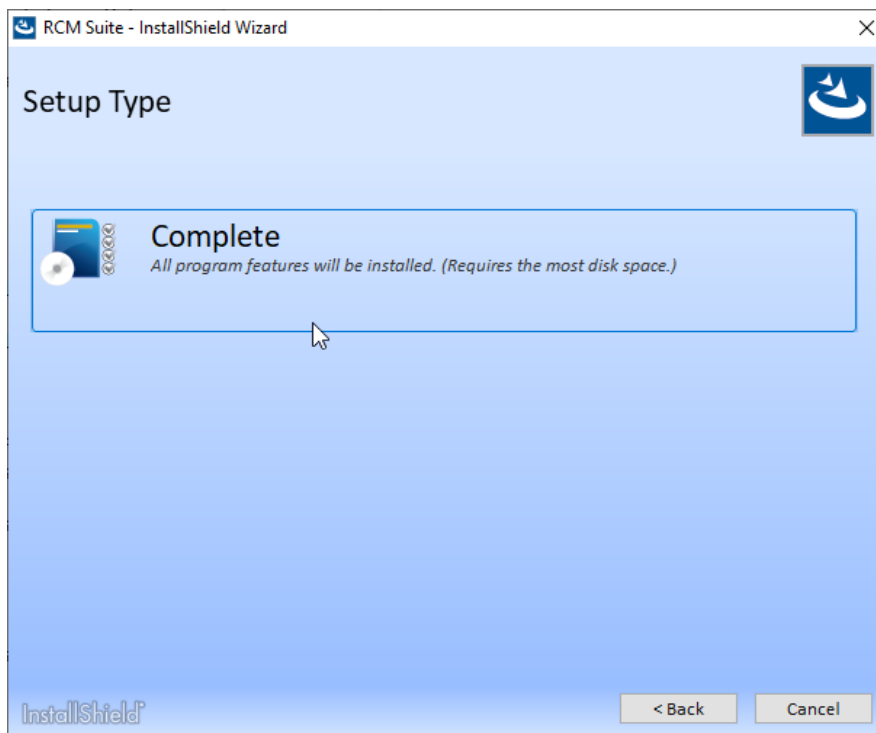
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5. On the *Shared User Setting Configuration* screen, select **System-wide** and click **Next**.



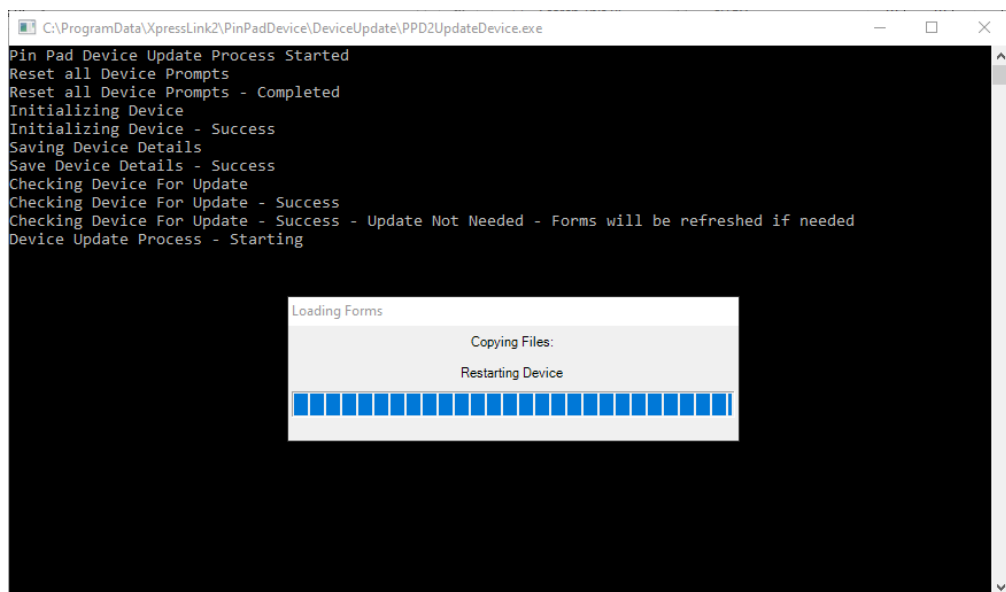
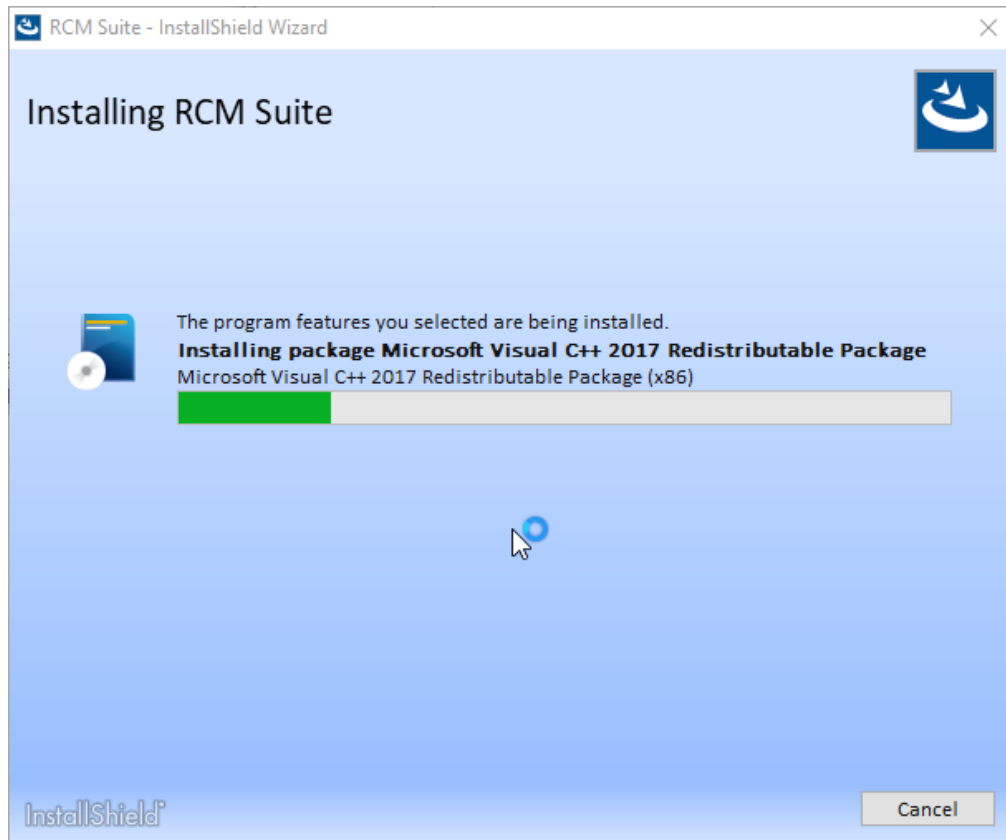
6. For Setup Type click **Complete** (the only option).



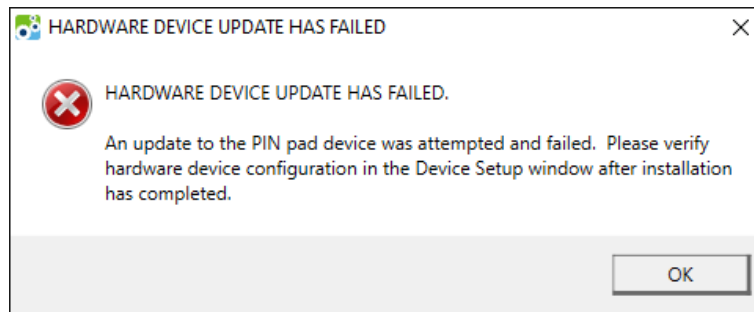
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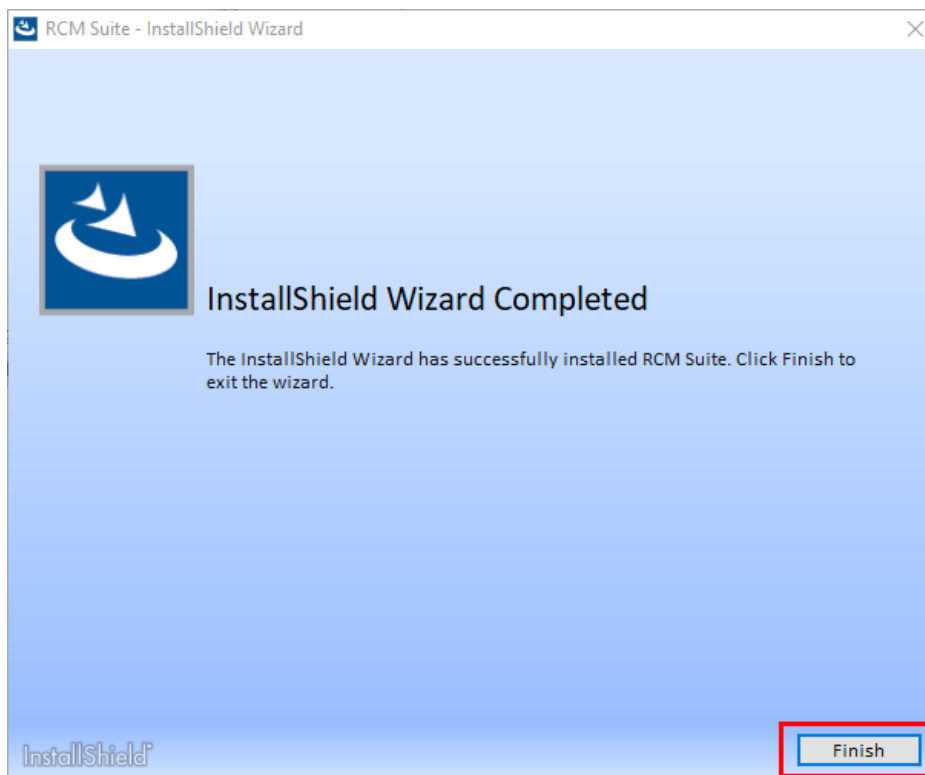
- The installation will now begin and you will see a few different screens appear. The POS device will make some sounds and restart at least one time during this process, and the process may take a few minutes.

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NOTE: If a message appears that says “HARDWARE DEVICE UPDATE HAS FAILED”, make sure the POS device is properly connected to the computer and restart the setup process.



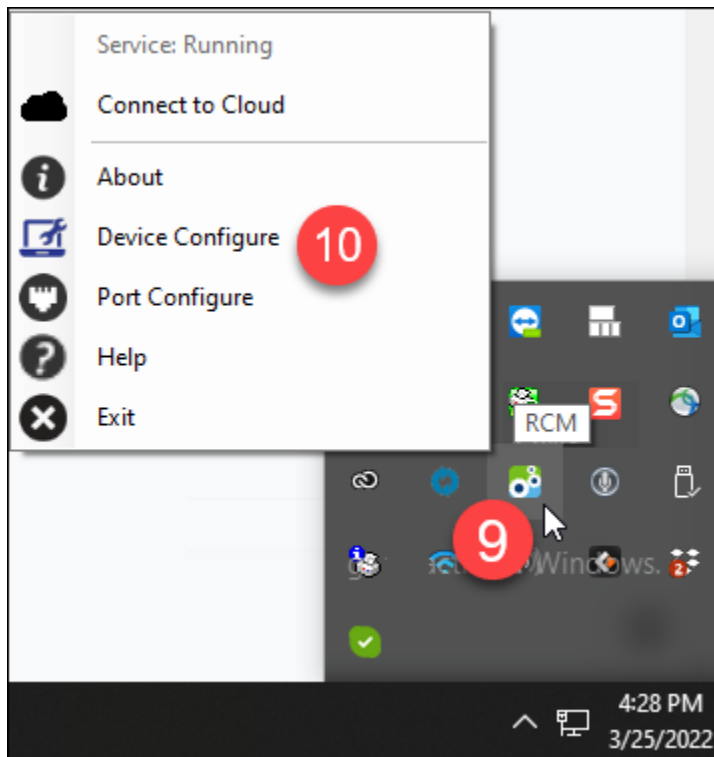
- When the installation has finished successfully you will see the InstallShield Wizard Completed window. Click **Finish**.



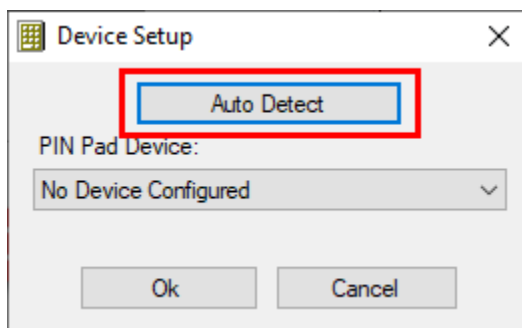
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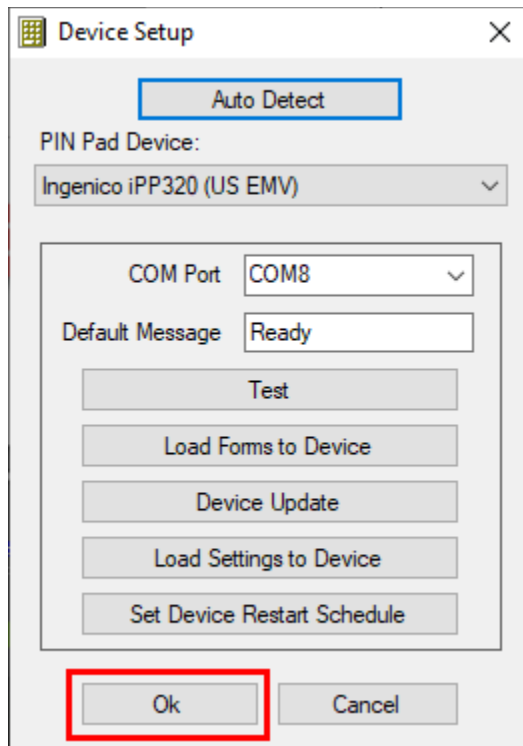
9. In the system tray (typically the lower-right corner of your screen), right-click the RCM icon.
10. In the menu that appears, click **Device Configure**.



11. In the window that opens, click **Auto Detect**.



12. Within a few seconds, the screen should change and show the settings for your POS device. Finally, click **Ok**.



That's it! Your device is ready to begin processing payments.

View Transactions Tab

From this tab you are able to search for transactions and then view, open, perform specific actions, and print or export them. To get started Click the down arrow on Search Fields.

The screenshot shows the Xceleran interface with the 'View Transactions' tab selected. A table of transactions is displayed with columns: Invoice No, Customer, Date, Amount, Status, Processed by, Payment Type, and ApprovalCode. A 'Show search fields' button with a dropdown arrow is highlighted with an orange box.

Invoice No	Customer	Date	Amount	Status	Processed by	Payment Type	ApprovalCode
2203220439220	Gary Rowding	3/22/2022 4:39:23 PM	100.00	Pending(Resend)		PL	
2203220326244	My test company	3/22/2022 3:26:24 PM	50.00	Error(Resubmit)	demouser@myserviceforce.com	ACH	
2203220308587	XYZ Co	3/22/2022 3:08:58 PM	100.00	Error(Resubmit)	demouser@myserviceforce.com	ACH	
2203220307488	XYZ Co	3/22/2022 3:07:48 PM	100.00	Error(Resubmit)	demouser@myserviceforce.com	ACH	
2203220249302	Gary Rowding	3/22/2022 2:49:30 PM	100.00	Paid	demouser@myserviceforce.com	CC	967906

From the Search screen you can:

The screenshot shows the Xceleran Search screen. Numbered callouts indicate the following features:

- 1: Search button
- 2: Sort columns by clicking the header
- 3: TransactionID column header
- 4: Excel button
- 5: Customer Name search field
- 6: Status search field

1. Find transactions by using the fields available.
2. Sort columns by clicking the header.

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- Refund or Void a transaction. (Note: Void is used if cancelling the transaction before it has processed in a GPI batch.) Refunds can be partial, by entering the amount to be refunded, or total.

Refund Transaction

Transaction ID: 853ab3d86bbc4749ae0bbe5ab68d9c4a

Invoice No: 2203220249302

Customer: Gary Rawding

Transaction Amount: 100.00

Refund Amount:

Payment Type: CC

Close Refund

- Export to an Excel file.
- Open a record.

Transaction Detail

Demo Company Terminal-1

Invoice No: 2203220249302

Customer: Gary Rawding

Date: 3/22/2022 2:49:30 PM

Amount: \$100.00

Status: Paid

Processed By: demouser@myserviceforce.com

Payment Type: CC

Approval Code: 967906

Reference ID:

Transaction ID: 853ab3d86bbc4749ae0bbe5ab68d9c4a

Close

- Resend a XPayLink.

Recurring Payments Tab

XcelranCC provides the capability to reuse payment information if added to the Recurring Payments list, i.e. store on file. This includes occasional use, referred to as “Manual” recurring or those that are processed on a regular calendar schedule. Any payment type can be stored. (Note: technically no payment details are stored in our programs, only a “token” that is sent to GPI/OpenEdge to retrieve information when called for.)

In this tab there are three primary functions, Search, Add New recurring transaction, and Process a Manual Transaction. (Note: You can also start the Add New process from the Sales tab after processing a manual transaction and clicking the Make Recurring button.)

Search

The search fields are highlighted and are used to find an individual transaction or perhaps a batch for a given Billing Cycle which is helpful to review upcoming Automatic Recurring charges for any modifications that need to be made.

The screenshot shows the 'Recurring Payments' tab with search filters and a table of transactions. The filters include Billing Cycle, Payment Type, Recurring Type, and Status. The table has columns for Task ID, Customer, Billing Cycle, Payment Type, Amount, #Payments, Start Date, Last Run, Next Run, Type, and Status. Below the table, there are four detailed views of the search field drop-down options.

Task ID	Customer	Billing Cycle	Payment Type	Amount	#Payments	Start Date	Last Run	Next Run	Type	Status
209940423472	Zahurul Haque	Monthly	CC	500.00	2	2021-10-01		2021-10-01	Automatic	Active
210080355250	Zahurul Haque	N/A	CC	100.00	Continuous	2021-10-08	2021-10-08		Manual	Active
21012010227	Zahurul Haque	Monthly	CC	50.25	3	2021-10-14		2021-10-14	Automatic	Active
2088240233144	Zahir Haque	Monthly	CC	50.25	1	2021-09-01		2021-09-01	Automatic	Active
209940406343	Zahir Haque	Weekly	CC	50.25	2	2021-09-17		2021-09-17	Automatic	Active
209950101418	Tausik Khan	Yearly	CC	10.00	2	2022-01-01			Automatic	Active

Billing Cycle options: All, Monthly, Bi-Weekly, Weekly, Yearly

Payment Type options: All, Card Processing, ACH Processing, Customer Statement

Recurring Type options: All, Automatic, Manual

Status options: Active, Inactive

Search Field Drop Down Options

Like other Search options the columns are sortable and results can be exported to an Excel spreadsheet.

Run a Manual Recurring Payment

After a search for a Manual Recurring transaction, you click on the transaction ID (1) to view and make any changes and then the Run button to process (2).

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The screenshot shows the 'Recurring Payments' section of the Xceleran interface. At the top, there are tabs for 'Sales', 'View Transactions', 'Recurring Payments', and 'Batch'. Below these are filters for 'Billing Cycle' (All), 'Payment Type' (All), 'Recurring Type' (Manual), and 'Status' (Active). A 'Search' button and an 'Add New' button are present. Below the filters is a table with columns: Task ID, Billing Cycle, Payment Type, Amount, #Payments, Start Date, Last Run, Next Run, and Status. The first row shows a Task ID of 2109221228200, which is highlighted with a blue circle and the number 1. The 'Status' column for this row shows 'Active' and a 'Run' button, which is highlighted with a blue circle and the number 2.

Add New Recurring Information

Adding a new transaction is a 3 step process. First add Customer Information. Second, the payment details. Third designate as Automatic or Manual and set the schedule if automatic.

Step 1 -After clicking the Add New button simply start by adding the Customer Information including the Payment Type from the drop down, amount to be processed, and click next. (Note: the amount can be \$0.00 to be updated when you process a future transaction.)

The screenshot shows the 'Customer information' form in the Xceleran interface. The form is divided into two main sections. The first section contains fields for 'Name on Card*', 'Email address*', 'Mobile', 'Address', 'City', 'State' (with a 'Choose...' dropdown), and 'Zip Code'. The second section contains fields for 'Payment Type' (with a 'Select...' dropdown), 'Reference ID', 'Amount*', and 'Description'. The 'Next' button is highlighted with a blue circle and the number 3. The 'Payment Type' dropdown is highlighted with a blue circle and the number 2, and the 'Amount*' field is highlighted with a blue circle and the number 4.

Step 2- Add the payment information.

The payment information will be slightly different based upon the payment type and does not apply to XPayLink as that is added by the customer directly. Here is CC Processing:

The screenshot shows the 'Card information' form. It contains three main input fields: 'Card Number' (masked as XXXX XXXX XXXX XXXX), 'Expiry Date' (with 'Month' and 'Year' dropdowns), and 'CVV' (masked as XXX). At the bottom of the form are two buttons: 'Back' and 'Next'.

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Step 3 – Recurring Settings.

First select the Recurring Type, i.e., Manual or Automatic. If Manual then select the current date for starting, N/A (not applicable) for billing cycle, zero (0) for number of payments which means it will be available until made Inactive, and save.

The screenshot shows a form titled "Recurring Settings" with the following fields and callouts:

- 1**: Recurring Type dropdown menu, currently set to "Manual".
- 2**: Start Date input field, showing a placeholder "mm / dd / yyyy".
- 3**: Billing Cycle (Based on start date) dropdown menu, currently set to "N/A".
- 4**: Number Of Payments input field, showing the value "0".
- 5**: A "Save" button at the bottom right of the form.

Below the input fields, there is a note: "Use zero (0) for continuous payments". At the bottom of the form are two buttons: "Back" and "Save".

If Automatic, then:

- Select the date for first payment. This will determine when future dates will be made.
- Pick the Billing cycle from the drop down from these choices.

A dropdown menu showing the following options:

- Select...
- Monthly
- Bi-Weekly
- Weekly
- Yearly
- N/A

- Select the number of payment cycles with (0) for payments to continue until made Inactive,
- and save.

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The image shows a 'Recurring Settings' form with the following fields and callouts:

- 1**: 'Recurring Type' dropdown menu, currently set to 'Automatic'.
- 2**: 'Start Date' text input field with a placeholder 'mm / dd / yyyy'.
- 3**: 'Billing Cycle (Based on start date)' dropdown menu, currently set to 'Monthly'.
- 4**: 'Number Of Payments' text input field, currently containing the value '0'.
- 5**: 'Save' button.

Below the 'Number Of Payments' field, there is a note: 'Use zero (0) for continuous payments'.

At the bottom of the form are two buttons: 'Back' and 'Save'.

Batch Tab

In the payment process world transactions are accumulated and send to the corresponding banks in batches, typically of not exclusively twice a day. Payments that are received into your bank account are based upon those batches. So, to closely reconcile payments the Batch process details are necessary.

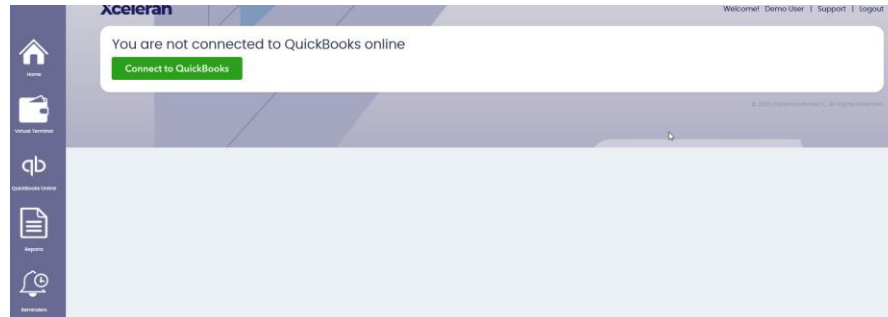
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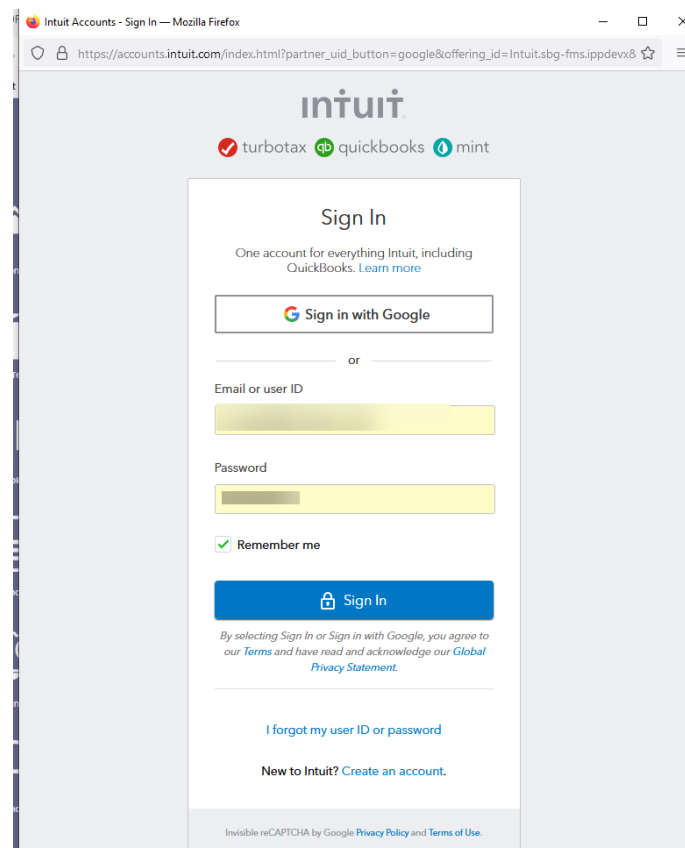
Chapter 3: QuickBooks Online

One of the major features of XceleranCC is the integration with QuickBooks Online. This has many benefits in terms of efficiency and accuracy. This integration also extends to any of the Business Management Software options.

Set up is very simple. When you first click on the QBO icon you will be asked to Connect to your QuickBooks account.



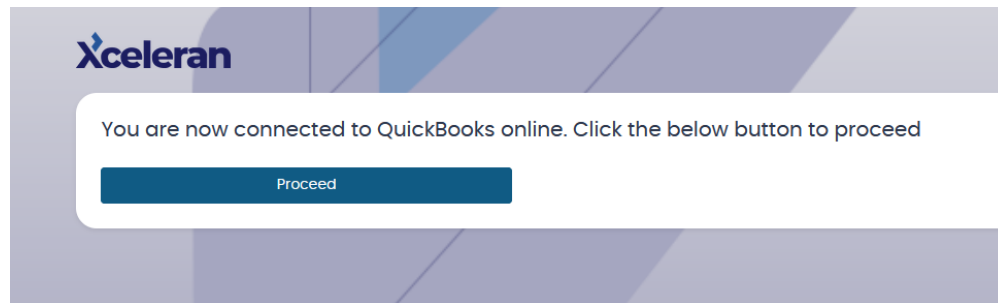
You will be presented with a login screen from Intuit in which you will enter your QBO login details.



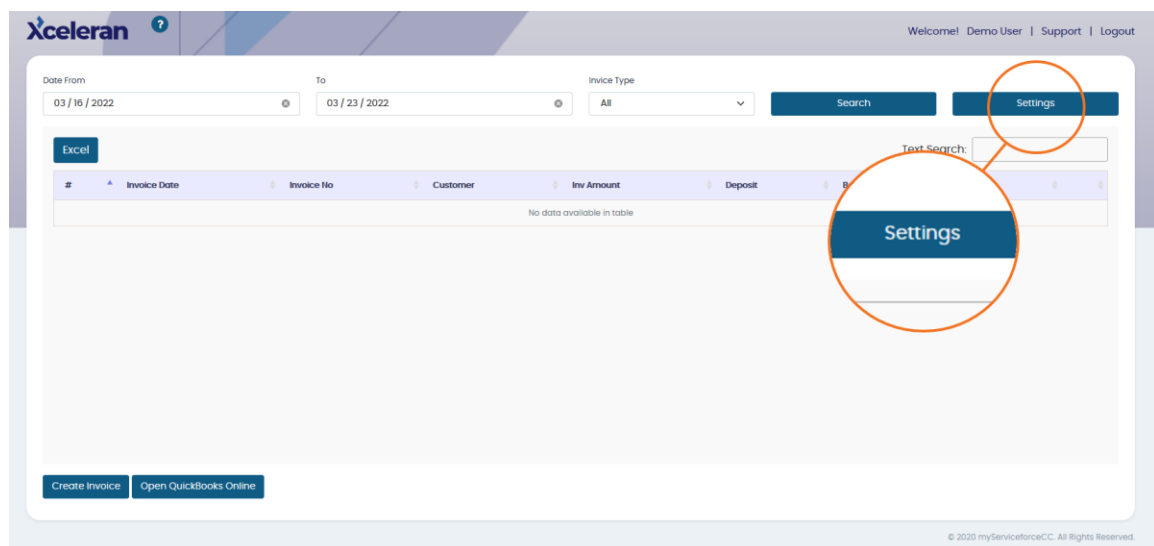
When completed the Intuit process you will be ready to Proceed.

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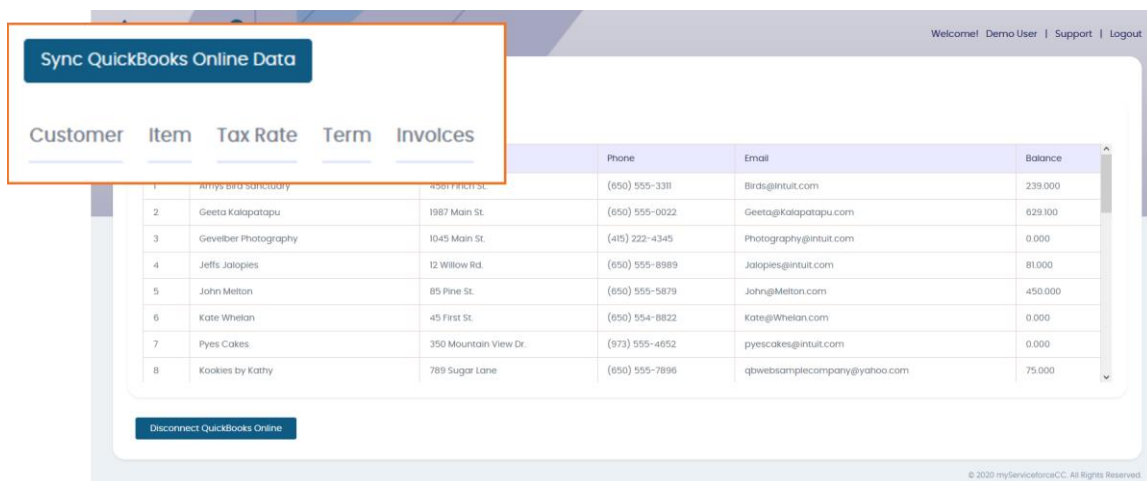
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This brings you to the QBO search screen, but first we need to Synchronize your data. You will need to do this anytime you disconnect from your QBO account otherwise it is done automatically.



Click on Settings and then click the Sync button. A sample of your data will appear under each of the tabs so you can be assured the data sync has occurred. It's not a bad idea to Disconnect from QBO when you will not be using XceleranCC for a period of time for security purposes.



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Clicking the QBO Icon in the Side panel or clicking Invoices will return you to the Search screen.

The screenshot shows the 'Invoices' search interface. At the top, there are date filters (Date From: 12/01/2021, To: 03/23/2022) and an 'Invoice Type' dropdown menu (All, Paid, Unpaid). A 'Search' button is labeled with a circled '1'. Below the filters is an 'Excel' button and a table of invoices. The table has columns: #, Invoice Date, Invoice No, Customer, Inv Amount, Deposit, Balance, Status, and a 'Receive payment' link. A circled '2' points to the 'Invoice No' column header. A circled '3' points to the 'Status' column. A circled '4' points to the 'Invoice No' field of the first row. A circled '5' points to the 'Create Invoice' button at the bottom left. A circled '6' points to the 'Open QuickBooks Online' button at the bottom left.

#	Invoice Date	Invoice No	Customer	Inv Amount	Deposit	Balance	Status	
1	03/21/2022	1038	Barnett Design	108.00	0.00	108.00	Unpaid & Overdue 2 Days	Receive payment
2	01/27/2022	1037	Sonnenschein Family Store	362.07	0.00	362.07	Unpaid & Overdue 25 Days	Receive payment
3	01/27/2022	1036	0969 Ocean View Road	477.50	0.00	477.50	Unpaid & Overdue 25 Days	Receive payment
4	01/15/2022	1004	Coal Cars	2369.52	2369.52	0.00	Paid	
5	01/27/2022	1035	Mark Cho	314.28	0.00	314.28	Unpaid & Overdue 25 Days	Receive payment
6	01/11/2022	1017	Sushi by Katsuyuki	80.00	80.00	0.00	Paid	
7	01/26/2022	1034	Rondonwuu Fruit and Vegi	78.60	0.00	78.60	Unpaid & Overdue 25 Days	Receive payment
8	01/26/2022	1033	Geeta Kalapatapu	629.10	0.00	629.10	Unpaid & Overdue 25 Days	Receive payment
9	01/05/2022	1021	Amey's Bird Sanctuary	459.00	220.00	239.00	Unpaid & Overdue 47 Days	Receive payment
10	01/24/2022	1032	Travis Waldron	414.72	0.00	414.72	Unpaid & Overdue 25 Days	Receive payment
11	01/15/2022	1013	Travis Waldron	81.00	81.00	0.00	Paid	
12	12/10/2021	1029	Dukes Basketball Camp	460.40	460.40	0.00	Paid	

There are 6 functions that can be done from this screen all pertaining to Invoice and Collections.

1. Search by date and invoice type, i.e., Paid or Unpaid.
2. Sort information by clicking a columns header.
3. Receive payment for an unpaid invoice which opens the Virtual Terminal and populates the data fields.
4. Clicking the Invoice field to opens the QBO invoice.
5. Create Invoice button is used to create a new invoice which can then be either be Saved to QBO for future payment or Saved and Submitted to open the Virtual Terminal for collection. (NOTE: The information to create the invoice comes from QBO. With the exception of a new customer any other new items must be added through QBO.) See more below.
6. For convenience a link is provided to open your QBO account.

Invoices

Invoices have the same general format and fields as QBO invoices. As mentioned above, clicking the Invoice Number of an existing invoice will open it. You can modify it and it will update QBO when you click one of the two Submit option buttons. Creating a New Invoice uses the fields and data from QBO. With the exception of a New Customer all other items are created in QBO. The Connect to QBO button makes that convenient.

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The screenshot shows the Xceleran invoice creation interface. Numbered callouts highlight the following fields:

- 1:** Customer dropdown menu.
- 2:** Invoice Date and Due Date fields.
- 3:** Product/Service dropdown menu.
- 4:** The main invoice table with columns for #, Product/Service, Description, Service Date, Qty, Rate, Amount, Tax, and Del.
- 5:** Discount(%) and Tax (California) dropdown menus.
- 6:** Message on invoice text area.

Buttons at the bottom include Submit, Submit & Pay, and Reset.

The fields you need to enter or can modify are highlighted above. Steps to complete a new invoice are similar to those in QBO:

1. Select a customer existing in QBO. (Note: The name that is used in XceleranCC is the Display Name in QBO.)

The screenshot shows the QuickBooks Customer information form. A red box highlights the "Display name as" field, which is currently set to "Bob Builder". Other fields include Title, First name, Middle name, Last name, Suffix, Email, Company, Phone, Mobile, Fax, Other, Website, and checkboxes for "Print on check as" and "Is sub-customer".

2. Invoice Date default is current day and the Due date is based upon your Terms with the default being Due Upon Receipt.
3. Product and Service field is selected from the drop-down menu. Quantity is required to be entered. Other fields can be modified and will be saved to that invoice but will not change the billable item in QBO for future use. The tax check box default is no tax.
4. A new line item is made available automatically after an entry is made.

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5. You can select a Discount by % or amount and if taxable an jurisdiction can be added from the drop-down menu.
6. Complete the Invoice by clicking Submit which saves it in XceleranCC and QBO or Submit and Pay which saves and then opens the Virtual Terminal for selection of payment method. (Note: as shown below, when requesting payment by XPaylink you can attach a copy of the invoice to the email by clicking the check box. You can also add other files from Attach Files.

The screenshot displays the 'Sales' section of the XceleranCC interface. At the top, there are tabs for 'Sales', 'View Transactions', 'Recurring Payments', and 'Batch'. Below these, four payment methods are listed: 'CC Processing', 'ACH Processing', 'XPayLink' (which is selected with a blue circle), and 'POS Processing'. The form fields include: 'Merchant' (Demo Company Terminal-1), 'First name' (Shara), 'Last name' (Barnett), 'Email address' (Design@intuit.com), 'Mobile' ((650) 557-1289), 'Address' (19 Main St.), 'City' (Middlefield), 'State' (Choose...), 'Zip Code' (94303), and 'Email BCC'. Two orange boxes highlight specific features: one on the left highlights the 'Attach QBO invoice pdf' checkbox, and one on the right highlights the 'Attach File/s (Max size: 3 MB; Max No. of files: 3)' section, which includes a 'Browse...' button and the text 'No files selected.'.

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Chapter 4: Reports Tab

The reports tab is another way to search and export data.

Chapter 5: Reminders Tab

Reminders can be created and sent automatically to customers that have been sent XPaylinks and have not responded. They are activated from the Send Reminders Check box on the XPayling page. The emails will include a XPaylink and attachments like the original link. The default is checked, i.e., they will send.

The content and timing of the Reminder is created from this tab. Select the Days after the initial XPaylink was sent, customize your message, and Save. (NOTE: Fields from the data base in [] brackets will be customized to the data. A list of the fields is in Appendix A.

Chapter 6: User Management

Users are added and their roles defined here. There are three standard classes of users:

- **Payment Processor** - They can see everything and create payments via manual entry in CC, ACH, XPaylinks, POS. They do not have access to QBO.
- **Bookkeeper** – They have the same rights as a Payment Processor plus the ability to access QBO functions.
- **Administrator** – All the above plus User Management.

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Appendix A – Content Fields

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Appendix B – XPayLink Customization

With XPayLink your customers will receive an SMS (text) message and/or email with a link where they can go to make their payment on-line. By default, the page will contain the basic information about the payment and your company name like in the example below.

The screenshot shows a payment statement interface with a blue header bar containing the text "Statement - Your Business, Inc.". Below the header, the statement details are displayed: "Statement Date: 03/28/2022" and "Total Balance: \$10.00". A large white box in the center shows "Amount to Pay: \$10.00". Below this, there is a "New Card" section with a radio button selected. It contains input fields for "Card Number", "Expiration", and "CVV", followed by a blue "PAY NOW" button. At the bottom, there is a "Thank you for your business" message and the company name "Your Business, Inc.".

It is best to customize this “on-line statement” to match your company branding to provide your customers with the best possible customer experience. To customize your on-line statement, simply provide us the following:

1. Your company logo (or other graphic) for the header/top of the statement.
2. A logo or graphic for the bottom/footer of the statement.
3. Your choice of banner/button color from the list below.

cyan - #00bcd4	orange - #ff9800	purple - #9c27b0
teal - #009688	brown - #795548	deep purple - #673ab7
green - #4caf50	blue grey - #607d8b	blue - #2196f3
light green - #8bc34a	grey - #9e9e9e	light blue - #03a9f4
lime - #cddc39	deep orange - #ff5722	indigo - #3f51b5
amber - #ffc107	red - #f44336	pink - #e91e63

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