

Charge Transactions

Andrew:

Alright your total comes to 99.99, how would you like to pay?

Customer:

Just charge it to my account, please.

Andrew:

Sure... That will work... just... let me see here... no...is it here?... One Second please...

Robert, how do you charge a transaction?

Robert:

In House Charge Transactions allow customers to make purchases and pay later when we send them a notice at the end of the billing cycle. The customer must be set up as an In-House Charge customer ahead of time.

Terry is already set up, so let me show you how to charge it. Select a topic, and I'll show you how it works.

Topics

- Post Screen
- Totals Screen

Post Screen

Eagle allows you to extend credit to some or all of your customers using In-House Charge Accounts.

Customers with charge accounts can purchase and pay based on their credit terms.

A charge account allows them to postpone payment until you send a statement at the end of your billing cycle.

Select a customer for the transaction.

Then, confirm the purchaser's authorization to make a charge for their company.

With the Customer Field selected, choose Menu Kpad and select Enter Charge Authorization.

Select the appropriate name from the list and choose OK.

You can add a temporary name to the list if needed, but make sure to call the customer to verify.

Otherwise, your Accounts Receivable clerk is typically the person who adds names to the Charge Authorization list.

When you finish adding items to the order, continue to the Totals Due screen as usual.

Totals Screen

Ask the customer if they want to charge the entire amount or a part of it.

If they're charging the entire amount, just press the Enter key; otherwise, enter the correct amounts in the corresponding fields first.

Eagle prompts for a signature.

When the customer signs on the electronic signature pad, select OK to confirm.

If you do not have a signature pad or for some reason the customer cannot sign, choose Cancel and follow the prompt for a list of override options.

With the signature or override accepted, Eagle completes the In-House Charge transaction.

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Corporate Office

804 Las Cimas Parkway
Austin, TX 78746
USA

Toll Free: +1.888.448.2636
Direct: +1.512.328.2300
Fax: +1.512.278.5590

Latin America and Caribbean

Blvd. Antonio L. Rodriguez #1882 Int. 104
Plaza Central, Col. Santa Maria
Monterrey, Nuevo Leon, CP 64650
Mexico

Phone: +52.81.1551.7100
Fax: +52.81.1551.7117

Europe, Middle East and Africa

No. 1 The Arena
Downshire Way
Bracknell, Berkshire RG12 1PU
United Kingdom

Phone: +44.1344.468468
Fax: +44.1344.468010

Asia

238A Thomson Road #23-06
Novena Square Tower A
Singapore 307684

Singapore
Phone: +65.6333.8121
Fax: +65.6333.8131

Australia and New Zealand

Suite 2 Level 8,
100 Pacific Highway
North Sydney, NSW 2060
Australia

Phone: +61.2.9927.6200
Fax: +61.2.9927.6298