Editing Transactions

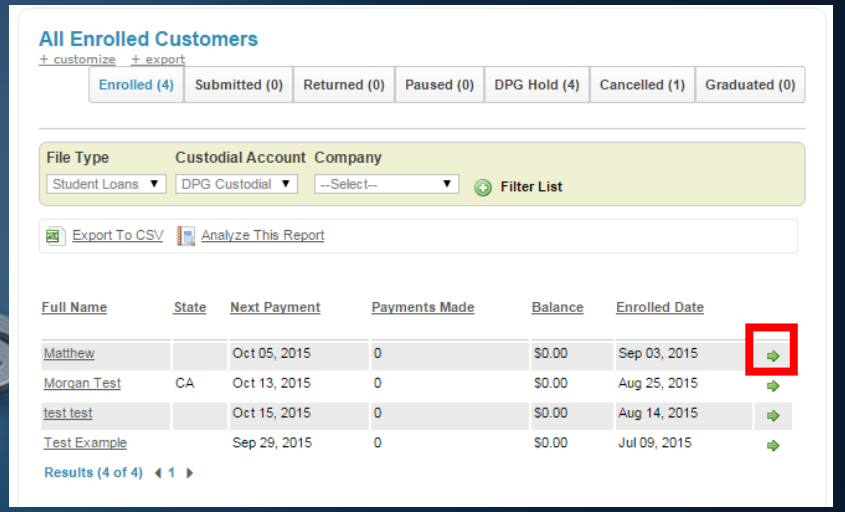
Once a contact has been enrolled you will have access to the enrollment details page where the contact’s payment schedule will be displayed and you will have the ability, depending on your permissions, to edit transactions if necessary.

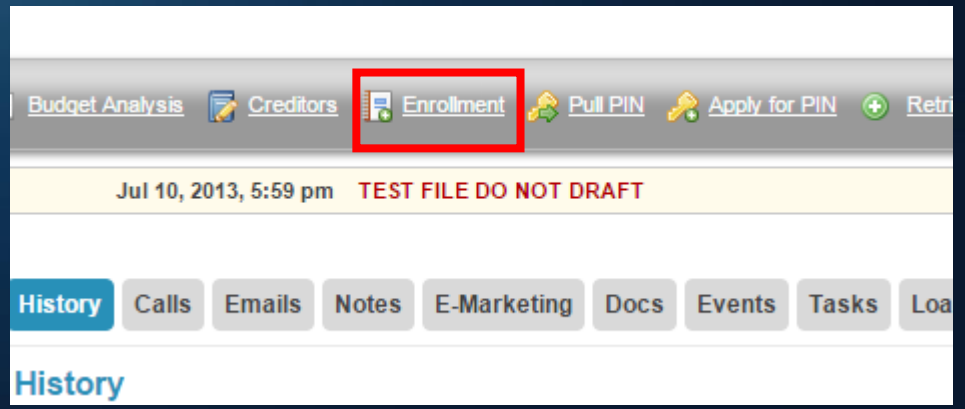
Editing an Individual Transaction

Enrollment Details Screen

You can go to the enrollment details screen 2 different ways.

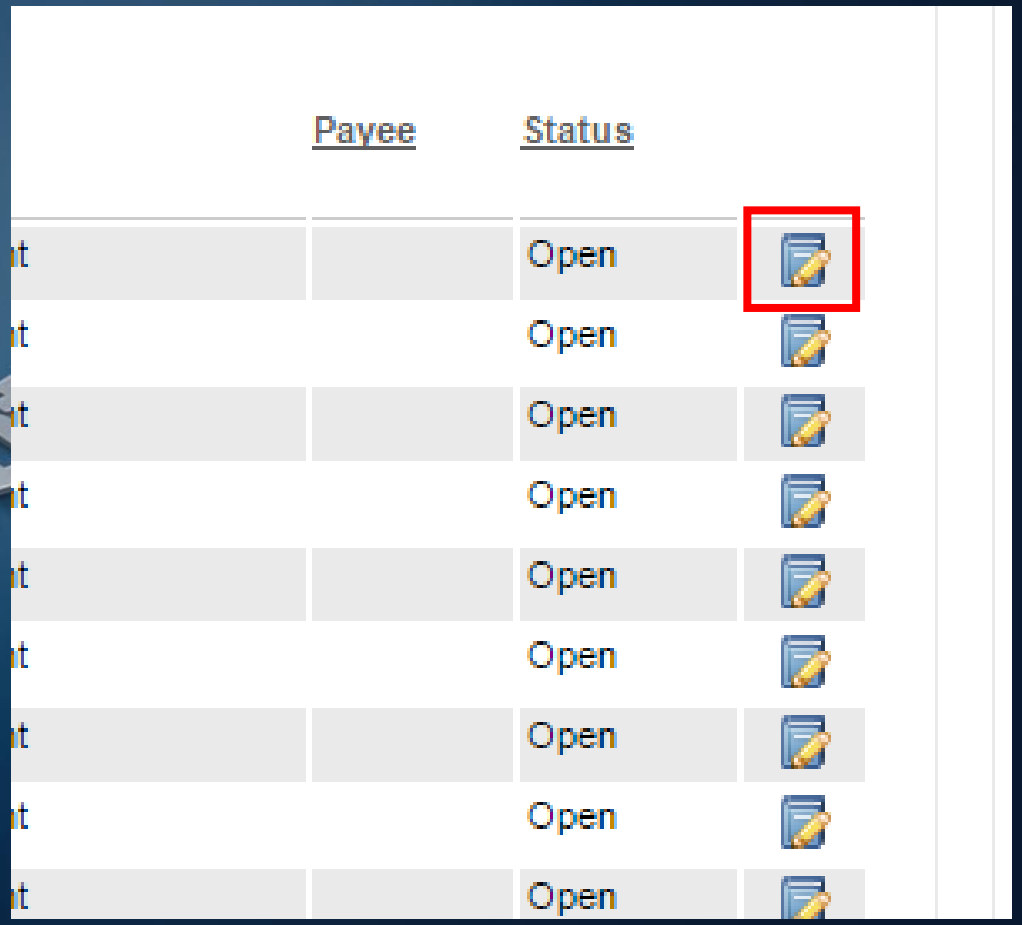
1. By clicking the green arrow at the end of the contact's row in the enrolled section under the enrollment tab (Pictured top right)
2. By clicking "Enrollments" from the client dashboard (Pictured bottom right)





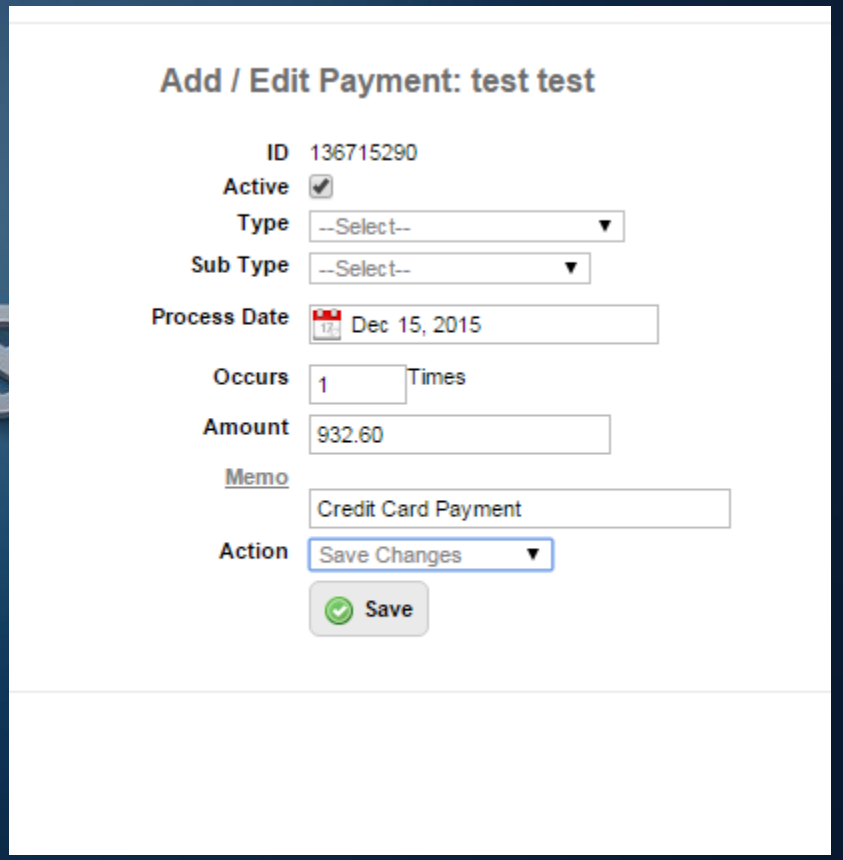
Editing an Individual Transaction

Once on the enrollment details screen you will see the clients payment schedule. At the end of each row of the transactions you will see a icon the looks like a notepad and pen. Click the icon to edit the transaction.



Editing an Individual Transaction Cont….

Now that you have opened the edit window you can make changes to the transaction including the process date or amount of the transaction. Once you have made changes be sure to select “Save Changes” from the action drop down menu before hitting the Save Button at the bottom.

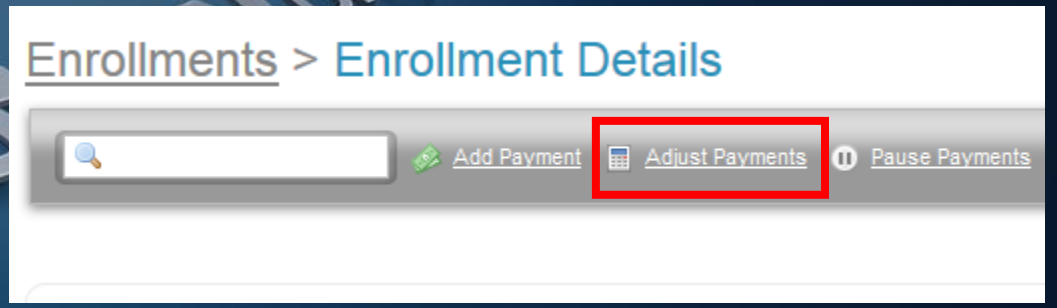


Adjusting Payments

This will allow you to change all or a group of payments at once.

Adjusting Payments

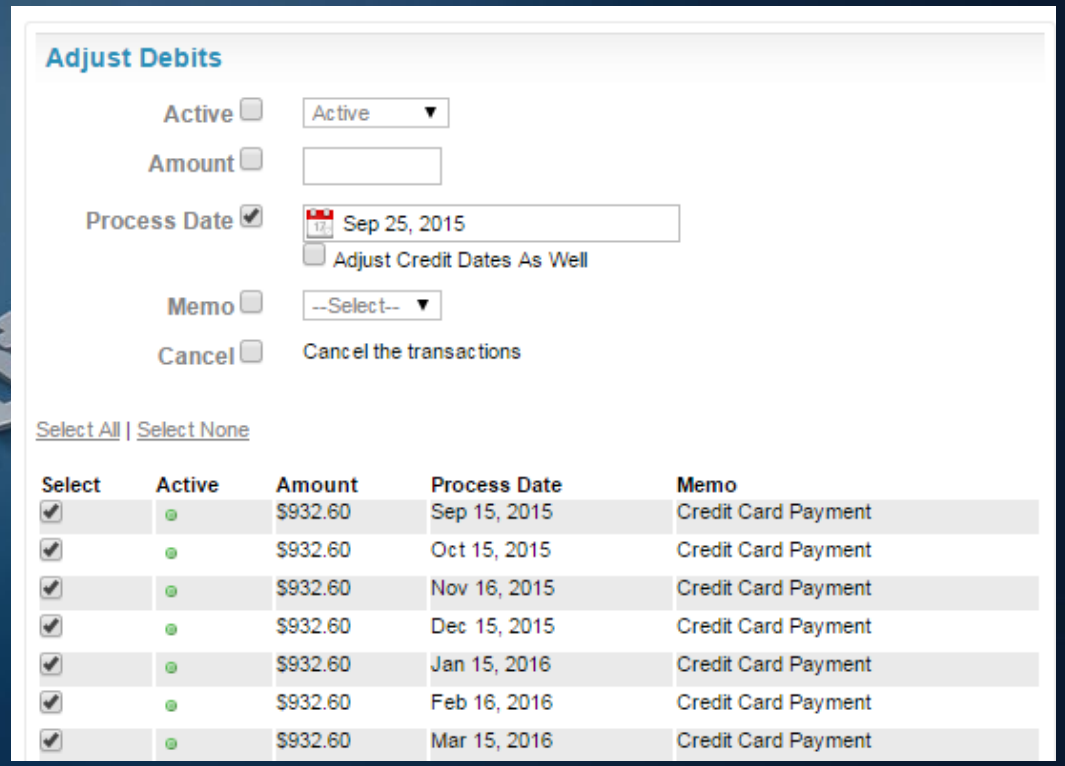
From the Enrollment Details page you can edit all or a group of transactions by going to the Adjust Payments page.



Adjusting Payments Cont…

Once payments have been resumed you will be taken to the “Adjust Payments” screen. In our example we will only be adjusting debit transactions, but you will find other sections of payment types in case you schedule credit fees or performance fees (this may not apply to your company depending on the type of business you are operating).

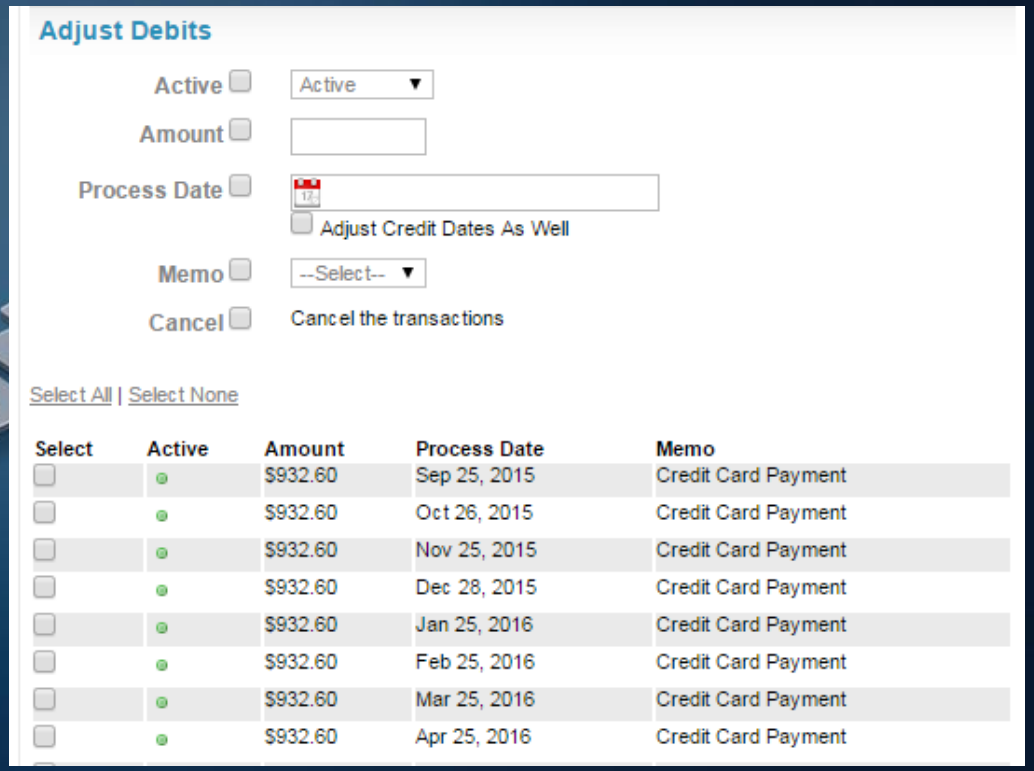
Now you should select the transaction(s) you wish to change and the attribute you are changing for it. In the example you can see I am adjusting all transactions and changing the payment date. In the example I have selected to change the payment date to Sept 25, 2015. What this means is the 1st of those selected transactions will have its process date changed to Sept 25, 2015, the subsequent process dates will also be changed but to the 25th (or pushed to the next business day if it falls on a weekend or holiday) of the following months.



Adjusting Payments Cont…

As you can see as a result of adjustment the payment schedule has changed so that all future payment will be made on the 25th of each month moving forward.

You are able to access this screen at any time by clicking on “Adjust Payments” located on the navigation bar of the enrollment details page.



FAQ

- Why didn’t this payment run?

  - If you find a scheduled payment has not processed (no change in status) the first item to check is that payment info is fully filled out. Make sure all Credit Card or Banking information is provided. If this does not resolve the issue please contact support@debtpaypro.com providing the ID number of the contact you are having issues with.

- I rescheduled a transaction for today (or enrolled client today with a payment scheduled for today) will the payment process?

  – Yes, as long as you have scheduled (or enrolled the client) prior to the scheduled batching times for your payment processor. Generally Credit Card processor will batch (process transactions) once early in the morning and then beginning mid day process hourly into the evening. You can contact support@debtpaypro.com for specifics regarding batch times of your payment processor.

- Why are there duplicate transaction listed on the enrollment details page scheduled a few days after the original Credit Card transaction?

  – You have not saved a compensation template for the enrollment plan resulting in credit transaction to be scheduled automatically. Form the enrollment details page click “Edit Enrollment Plan” located on the navigation bar then go to the bottom of the options on the left hand side and to the section labeled “Comp Template”. Select the option there meant for Credit Cards (most likely you will have only one option labeled “Blank” or “Standard”).