

PAYMENTS USER GUIDE

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Payments User Guide

Overview

Improve your customer and employee experience through mobile payments and onsite payment terminals through the Payments solution. The Payment solution is run on the iService platform. The solution can be used in one of these three configurations depending on the solutions that a dealer may be using.

- iService standalone customers – no integration offered with a competitive DMS provider
- iService customers who are also using Lightyear as their DMS
- Lightyear only customers will receive an iService site to run the Payments solution

Accepting Payments in Service

Select the **\$** button from the top navigation bar in the **Totals** window in Service.

The screenshot shows the DealerBuilt interface with the 'Totals' window open for Repair Order 1130387. The top navigation bar includes buttons for 'RO Summary List', 'Estimate', 'WriteUp', 'Dispatch', 'Jobs', 'Totals', 'Lookup', 'RO Hist', 'Reports', 'Parts', 'ceDMS', 'Schedule', 'SOR', and 'MPI'. A red box highlights the '\$' button in the 'Totals' section of the navigation bar. The main window displays a table of charges and payments, with a 'Sub-Total' of 158.61 and an 'Amount Due' of 158.61. The 'Amount Due' is highlighted in yellow, and the 'Customer Pay' amount is highlighted in green.

	Internal	Serv Contract	Warranty	Customer Pay	RO Total
Labor	0.00	0.00	0.00	60.00	60.00
Parts	0.00	0.00	0.00	85.85	85.85
Sublet	0.00	0.00	0.00	0.00	0.00
Freight	0.00	0.00	0.00	0.00	0.00
Car Rental	0.00	0.00	0.00	0.00	0.00
Miscellaneous	0.00	0.00	0.00	0.00	0.00
Tax/Fees	0.00	0.00	0.00	12.76	12.76
Co-Pay (memo)	0.00	0.00	0.00	0.00	0.00
Sub-Total	0.00	0.00	0.00	158.61	158.61
Distribution	0.00	0.00	0.00	0.00	0.00
Distribution Total	0.00	0.00	0.00	0.00	0.00
Amount Due	0.00	0.00	0.00	158.61	158.61

The **Payments for Repair Order** popup will appear. The user will need to select how to process the card payment by selecting **Text Customer**, **Manually Enter Card** or **Swipe / Tap Card**.

The screenshot shows the 'Payments for Repair Order 1130387' popup. It displays a remaining balance of \$158.61 and provides three options for how the customer will pay: 'Text Customer', 'Manually Enter Card', and 'Swipe / Tap Card'. The 'Manually Enter Card' option is highlighted with a red box. Below the payment options, there is a 'New Payment Request' section with an amount field set to \$158.61 and a 'Customer Pay' button. A red box highlights the amount field and the 'Customer Pay' button. A 'Print' button is located at the bottom right of the popup.



Processing Swipe / Tap Card Payment

- Select the **Swipe / Tap Card** button and confirm the balance due, that pulls to the **Amount** field.
- Based on the settings for Processing Fees, a user may also see an amount in the **Processing Fee** field that charges the customer an additional fee for use of the credit card.
- **Choose a Terminal** from the drop-down menu and select **Push to Terminal** button to process the transaction.

Payments for Repair Order 1130387

Remaining Balance: \$158.61

REPAIR ORDER: 1130387
\$158.61 Created: 02/20/26, 03:58 PM
 CREATED: 02/20/26, 03:58 PM Delete

Choose how customer will pay

Text Customer Manually Enter Card **Swipe / Tap Card**

Save Card for Future Payments

PROCESSING FEES
 \$23.79

CHOOSE A TERMINAL
 Cashier

New Payment Request

Amount
 \$158.61 Customer Pay

Multiple payments must have unique amounts to prevent the payment processor marking them as duplicates.

- Once the card transaction is processed, the user will see a timestamp in green to indicate the payment has been processed.

Payments for Repair Order 1130387

Remaining Balance: \$0.00

REPAIR ORDER: 1130387
\$182.40 Paid: 02/20/26, 04:03 PM
 (\$158.61 + Fee: \$23.79)
 CREATED: 02/20/26, 03:58 PM
 PAID: 02/20/26, 04:03 PM
 CONFIRMED: 02/20/26, 04:03 PM
 RECEIPT SENT: 02/20/26, 04:03 PM

New Payment Request

Amount
 -\$23.79 Customer Pay

Payment amount must be positive.



- The Accounting distribution for the transaction will appear in the distribution section of the **Totals** window.

Location 1: DealerBuilt Ford CA

Advisor	RGAD1 Green Rachel	Totals	Internal	Serv Contract	Warranty	Customer Pay	RO Total
Mileage In	67,280	Ready To Post					
Mileage Out	67,282	Close Dates					
RO	02/20/26	Labor	0.00	0.00	0.00	60.00	60.00
Notify date	02/20/26	Parts	0.00	0.00	0.00	85.85	85.85
Completed	02/20/26	Sublet	0.00	0.00	0.00	0.00	0.00
Delivered	02/20/26	Freight	0.00	0.00	0.00	0.00	0.00
Tax Location	CA	Car Rental	0.00	0.00	0.00	0.00	0.00
Closed Date		Miscellaneous	0.00	0.00	0.00	23.79	23.79
Close Count	0	Tax/Fees <input type="checkbox"/> Exempt	0.00	0.00	0.00	12.76	12.76
CarryOver		Co-Pay (memo)	0.00	0.00	0.00	0.00	0.00
Authorized		Sub-Total	0.00	0.00	0.00	182.40	182.40
Cust P/O		Distribution	0.00	0.00	0.00	0.00	
Engine Hours	0.00	Distribution Total	0.00	0.00	0.00	182.40	182.40
		Amount Due	0.00	0.00	0.00	0.00	0.00

Co.Div	Accour	Account	Description	Pay Typ	Amount	Control	Control 2	Description	Pmt Mth	RO	Dist	Date	User
1	0	10110	CREDIT CARD CLE	C	182.40	1130387	1130387	Transaction: 000000769	CC	1	02/20/26	API	

Accepting Payments in Parts

Select the **\$** button from the top navigation bar in the **Counter** window.

Invoice # 1062686

Customer Pay: Suzy Scribner
Address: 101 Main Ave, Clarksville, IA 50619
H Phone: (614) 555-8525
E-Mail: sscribner@hotmail.com

Invoice Details:
A/R No: 5558525
Charge: YES
Price Cat: 0
Date: 02/20/26
Pay Method: 1164981

Part Number	Group	Loc	Vndr	Src	Description	Bin	AW/OH	Cost	List	Qty Ord	Qty Ship	Line Total	PPay	Comments	Sale Type	PrePaid	Document
300	R	1	FOR	3	KEY CHAIN	F06	76 / 74	7.25	15.59	7.25	2	2	14.50				

Sub-Total: 14.50
Total Due: \$ 14.50

The **Payments for Parts Invoice** popup will appear. The user will need to select how to process the card payment by selecting **Text Customer**, **Manually Enter Card** or **Swipe / Tap Card**.



Processing Manual Payment

The **Amount** field will populate with the remaining balance due.

Payments for Parts Invoice 1062686

Remaining Balance: \$14.50

\$14.50 **CREATED** Delete

Choose how customer will pay

Text Customer Manually Enter Card Swipe / Tap Card

New Payment Request

Amount

\$14.50 Add Payment

Multiple payments must have unique amounts to prevent the payment processor marking them as duplicates.

Internal Notes

Print

Select the **Add Payment** button to process the amount entered in the **Amount** field.

Payments for Parts Invoice 1062686

Remaining Balance: \$14.50

New Payment Request

Amount

\$14.50 Add Payment

Internal Notes



Processing Swipe/Tap Payment

- Select the **Swipe / Tap Card** button and confirm the balance due that pulls to the **Amount** field.
- Based on the settings for Processing Fees, a user may also see an amount in the **Processing Fee** field that charges the customer an additional fee for use of the credit card.
- **Choose a Terminal** from the drop-down menu and select **Push to Terminal** button to process the transaction.

Payments for Parts Invoice 1062686

Remaining Balance: \$14.50

\$14.50 **CREATED** Delete

Choose how customer will pay

Text Customer Manually Enter Card **Swipe / Tap Card**

Save Card for Future Payments

PROCESSING FEES
\$2.18

CHOOSE A TERMINAL
Cashier ▼ **Push to Terminal**

New Payment Request

Amount
\$14.50 ⓘ **Add Payment**

Multiple payments must have unique amounts to prevent the payment processor marking them as duplicates.

Internal Notes

Print

- Once the card transaction is processed, the user will see **CONFIRMED** in green

Payments for Parts Invoice 1062686

Remaining Balance: \$0.00

\$16.68 **CONFIRMED** ^

Email Receipt **Void** **Print**

New Payment Request

Amount
-\$2.18 ⓘ **Add Payment**

Payment amount must be positive.

Internal Notes

Print

- The Accounting distribution for the transaction will appear in the distribution section of the Counter window.



Part Number	Group	Loc	Vndr	Src	Description	Bin	Avl/OH	Cost	List	Sell	Qty Ord	Qty Ship	Line Total	P Pay	Comments	Sale Type	PrePaid Document
300			FOR	3	KEY CHAIN	F06	76 / 74	7.25	15.59	7.25	2	2	14.50				
I								0.00	0.00	0.00	0	0	0.00				

Voiding a Transaction

A transaction can be voided but it must be voided before the batch cutoff time for the daily credit card processing. A void transaction will “undo” the original credit card transaction before it is settled and will avoid incurring any processing fees.

The **Void** button will be active in the payment window.

Payment

Remaining Quote Balance: **-\$101.58**
of quote total: \$9.02

Unpaid Payment Requests: **\$0.00** (excluding wholly and partially refunded payments)

REPAIR ORDER: 56438 CREATED: 02/11/26, 03:24 PM

\$110.60 Paid: 02/11/26, 03:24 PM PAID: 02/11/26, 03:24 PM

CONFIRMED: 02/11/26, 03:24 PM

RECEIPT SENT: 02/11/26, 03:24 PM

Email Receipt
Void
Print

New Payment Request

Amount: Customer Pay Add Payment

For Service & Parts, voids write back a second distribution (to maintain the paper trail). For Finance payments, the system will void the receipt in Lightyear.

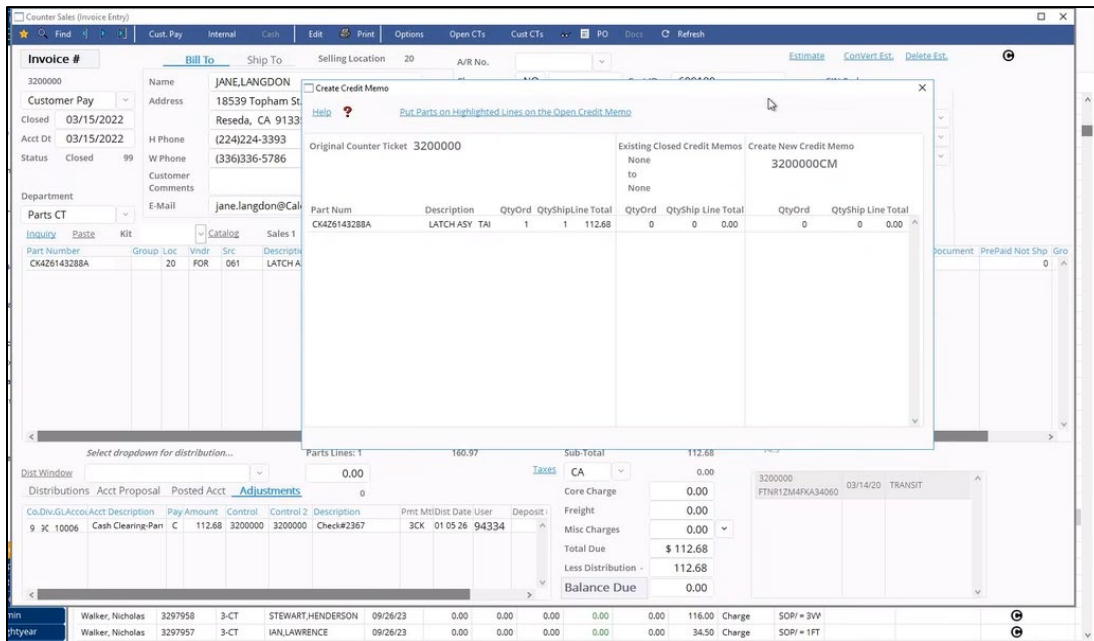


Processing Refunds

Parts – Credit Memo

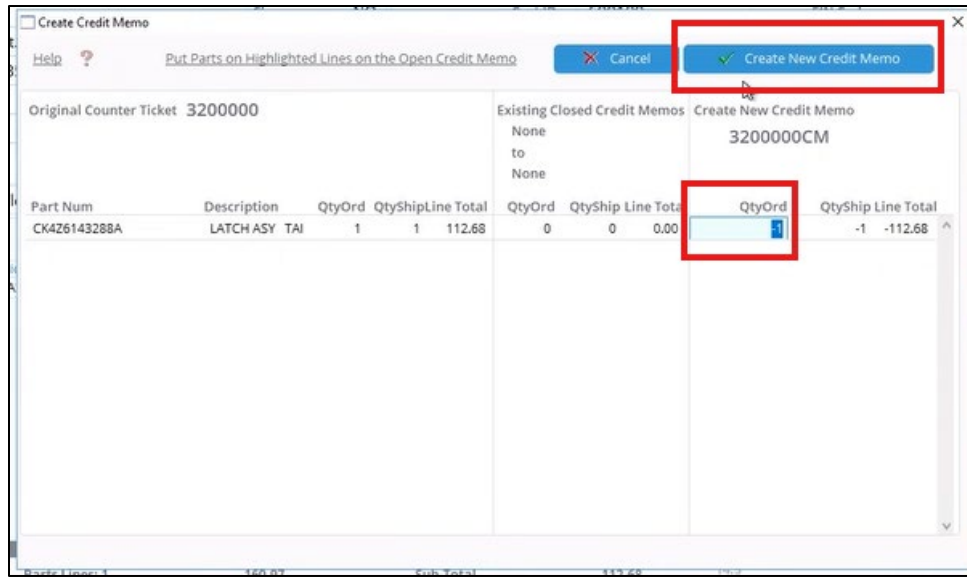
A credit card refund can be processed in the **Counter** window in Parts. To process a refund, follow these steps.

1. Make sure the original CT is in status “99” which means it has been posted to accounting
2. Follow the normal steps to process a Credit Memo, returning the part(s) to inventory and creating a “CM” invoice
 - Access the **Counter** window in Parts and locate the original CT.
 - Click **Options, Create Credit Invoice**
 - Highlight the parts that are being returned from the original invoice
 - Click the Hyperlink at the top of the **Create Credit Memo** window

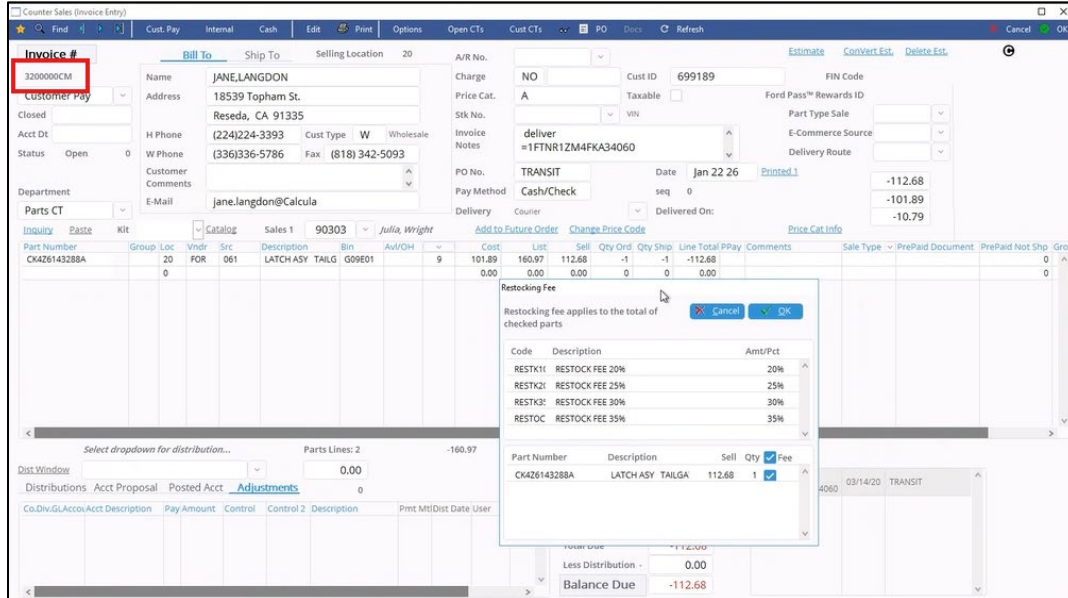


- Adjust **QtyOrd** field to represent the number of parts being returned, then select **Create New Credit Memo**





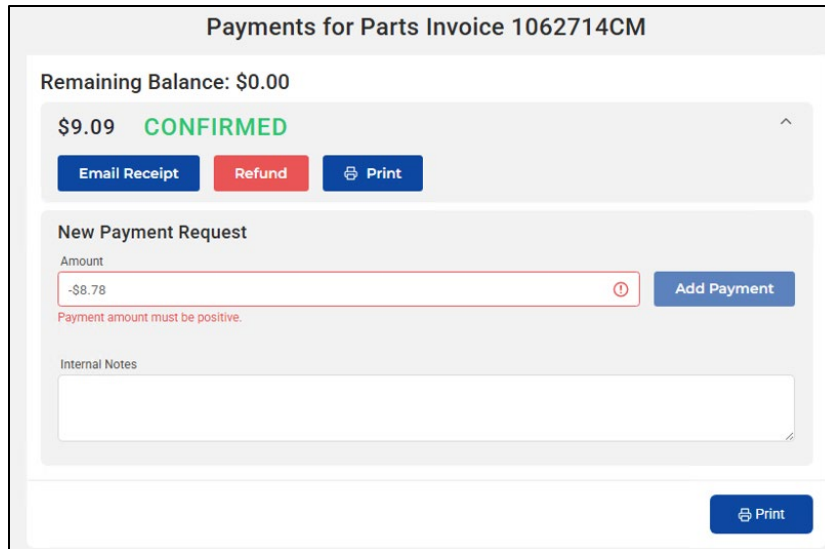
- The original invoice will now appear with a “CM” at the end of the counter ticket number.



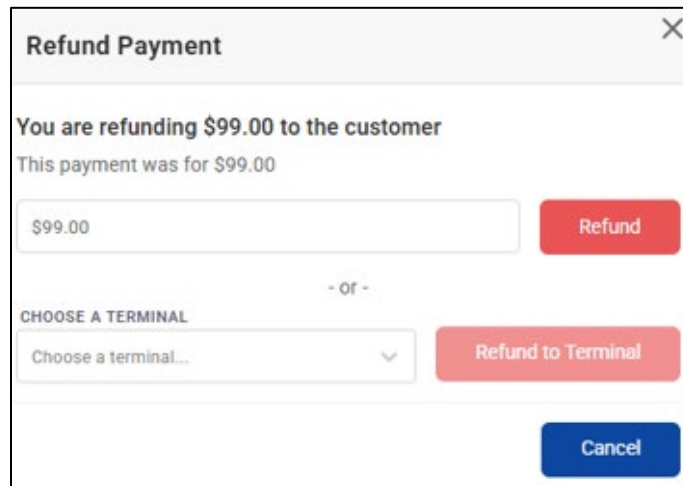
3. Refund the payment

- Click the **\$ Pay** button from the **Counter** window
- The **Payments for Parts Invoice** pop up will appear
- The refund amount will pull to the **Amount** line. Leave the negative amount in the Amount field alone.
- Hit **Refund** button



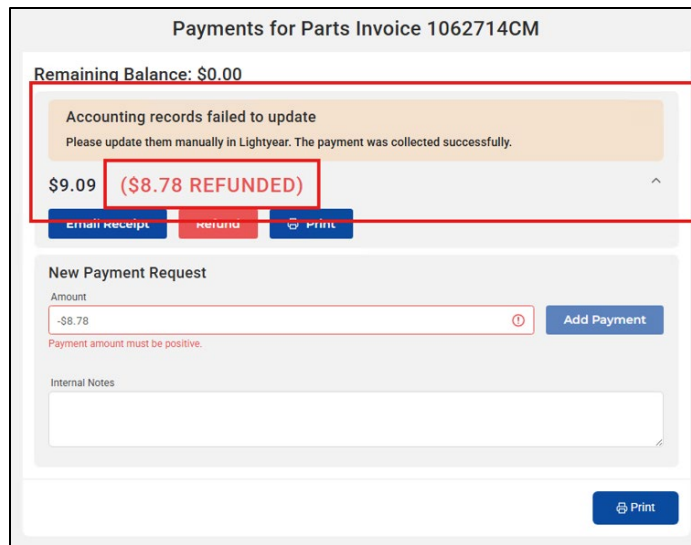


- The **Refund Payment** pop-up will appear
- The user will need to update the amount to be refunded to match the amount of the Credit Memo, then tap **Refund**



- Continue with the normal steps to process a credit card transaction. When everything has been completed for the refund transaction the user will receive this confirmation pop-up message.





RO's and F&I

The refund process for RO's and monies taken in F&I will follow the same process flow. The user will need to locate the original transaction in Lightyear to proceed with processing a refund.

Note: Surcharges are not calculated when processing a refund. The refund amount will default the original transaction amount less any surcharges.

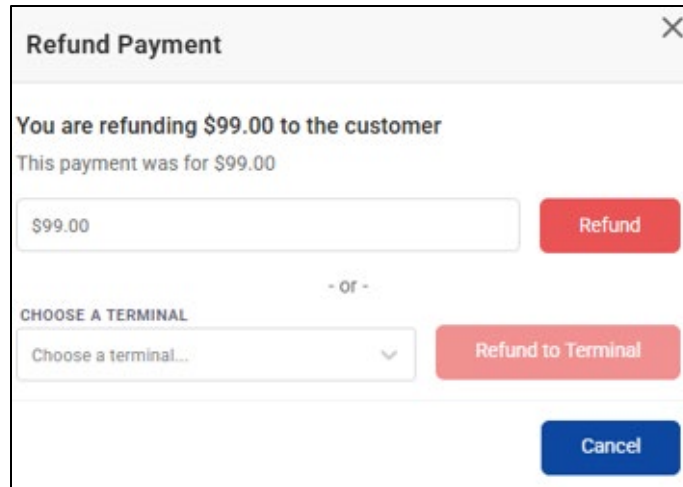
Refund the payment

- Click the **\$ Pay** from one of the following windows
 - From the **Totals** window in Service for RO's
 - From the **Deal Transaction** window in F&I for Deals
 - From the **Customer Master** window when monies were collected against a customer number i.e., no RO, CT or Car Deal.
- Find the original transaction and hit **Refund**



- The default amount is the full transaction value. The user can adjust the amount if needed, then tap **Refund**.





Exception: If the original transaction was a debit PIN, industry practice requires the customer to provide a physical card they want the funds returned.

1. Select **Refund to Terminal**
2. On the pin pad, select **Manually Enter** or **Swipe/Tap**
3. Key in the desired card (or swipe it). It does not need to be the original payment method.

Writeback

For Repair Orders & Counter Tickets, a new distribution writes back for the negative amount. This retains the audit trail for accounting purposes.

For Deals a refund will void the receipt in Lightyear. Refunds writeback if they are for the full amount and the receipt's still open in Lightyear; otherwise, the user's warned they need to manually update the accounting.

Accepting Payments in F&I

To process a payment from the **Deal Transaction** window, a deal must be started in F&I to link a card transaction. The option to process payments is also available in the **Wholesale/Dealer Trade** window.

The amount that pulls into the payment request comes from the **Cash Down** field in the **Buy** window or the **Lease** window.



Deal Transaction: 267125; Moore, Aaron | 417968; 2025 Ford Escape | Zuniga, Claudia

Deal Location: 1-Dealerbuilt Ford

Customer ID: 1407000 :MOORE,AARON

Deal Number: 267125 :FMCC BUY \$653.90

Stock: 417968 New 2025 Ford Escape

Trade Stocks: 417968A

Tracy Call: PROCESS

Buttons: Find, Edit, Delete, Print, Options, Itemizations, **Pay**, Docs

Deal Log: 1 : 1

Deal Info: Invoice Nbr (267125), Sale Type (New), Customer Type (Retail), Finance Type (Finance), Commissions Type (Domestic New), Accounting Date (01/12/26), Finance Mgr (Rubio,Josh), Sales Mgr (Green,Sophia), Due Bill # (D267125)

Financing Information: Lender (Ford Motor Credit Co), 2nd Lien Holder, BUY info (Rate: 9.00, Total Sale: 35,345.00)

Processing payments from the Guest window

Guest: 267125; Moore, Aaron | 417968; 2025 Ford Escape | Zuniga, Claudia

Location: 1-Dealerbuilt Ford

Customer ID: 1407000 :MOORE,AARON

Deal Number: 267125 :FMCC BUY \$653.90

Buttons: Find, Edit, Insert, Print, Options, Clear, Credit, **Pay**, Docs

Guest Description: Referral

Last Contacted: Jan 12, 2026

Prefix: No Title

First name: Aaron, Middle name: K, Last name: Moore

Address: 827 Mebaga Court, Menifee, CA 92584

Home Phone: (223) 223-4469

Work Phone: (334) 334-7938

Cell Phone: (614) 975-5007

Other Phone: (556) 556-5876

Fax Phone: (667) 667-9345

E-mail: aaron.moore@Velity

Desires: Stock (417968), Make (Ford), Model (Escape), Year (2025), VIN (1FMCU9MN0), Body (SUA14483)

Payments Table:

Stock	Year	Model	Buy	Lease	Status
417968	2025	Escape	653.90	0.00	SOLD

Currently Owned Vehicle / Trade (1): VIN (1GKKVNE6GJ312514), Year (2016), Make (GMC), Model (Acadia)

Sales Personnel: Salesperson 1 (Zuniga, Claudia), Salesperson 2, Sales Manager (Green, Sophia), Team Leader 1, Team Leader 2

Processing a Payment – No Stock

From the **Guest** window, select a customer to process a payment, then select the **\$ Pay** button. A deal # will be created to tie the customer payment for tracking purposes, along with a Cash Receipt.



The screenshot shows the DealerBuilt CRM interface for deal 267201. The left sidebar contains customer information: Location (1-Dealerbuilt Ford), Customer ID (184574-CAMPBELL,AARON), Deal Number (267201 :Not Written Up), Guest Description, Adv. Source, UP-Source (Walkin), Last Contacted (Jan 22, 2026), Prefix (No Title), Co-buyer (checked), First name (Aaron), Middle name (A), Last name (Campbell), Address (42 Gekal Street), Zipcode (92544), City, St. (Hemet, CA), County (Riverside), Home Phone, Work Phone, Cell Phone, Other Phone, Fax Phone, and Email (aaron.campbell@Bizmatic).

The main area shows 'Deal Info' with tabs for Co-Buyer, Prospecting, Veh Prefs, Trades, and Phy Dam Ins. Under 'Desires', there are fields for Stock, N/U, Year, VIN, Make, Model, and Body. A 'Payments' tab is active, showing a table with columns for Stock, Year, Model, Buy, Lease, and Status. Below this is a 'Currently Owned Vehicle / Trade (1)' section with fields for VIN, Year, Make, and Model. The 'Sales Personnel' section lists Crawford,Dave as Salesperson 1 and STEVE as Team Leader 1. A red box highlights the '\$ Pay' button in the top navigation bar.

Enter the amount to collect in the **Amount** box and select **Add Payment**

The screenshot shows the 'Payments for Deal 267201' form. At the top, it says 'Total Down Payment: \$0.00'. Below this is a 'New Payment Request' section. It has an 'Amount' field with '\$500.00' entered and an 'Add Payment' button. There is also an 'Internal Notes' text area.

Choose how the customer will pay, **Text Customer**, **Manually Enter Card**, or **Swipe/Tap Card**

The screenshot shows the 'Payments for Deal 267201' form after a payment has been added. It displays '\$500.00 CREATED' with a 'Delete' button. Below this, there are three radio button options for payment method: 'Text Customer' (selected), 'Manually Enter Card', and 'Swipe / Tap Card'. The 'New Payment Request' section is still visible with '\$0.00' in the 'Amount' field. A 'Print' button is located at the bottom right.



If **Swipe/Tap Card** is selected the user will need to select which Terminal, they are using to process the transaction. If a **Processing Fee** has been set up to calculate, that will display in the window. Then select **Push to Terminal** to send the credit card transaction.

Payments for Deal 267201

Total Down Payment: \$0.00

\$500.00 **CREATED** Delete

Choose how customer will pay

Text Customer Manually Enter Card **Swipe / Tap Card**

Save Card for Future Payments

PROCESSING FEES
\$75.00

CHOOSE A TERMINAL
Cashier ▼ **Push to Terminal**

New Payment Request
Amount
\$0.00 Add Payment

The user will receive the following notification once the **Push to Terminal** button has been selected

Make a payment

Payment In Progress

Waiting for payment confirmation from the terminal

Payment has been sent to Terminal Cashier from the customer to pay. This payment will timeout in 2 minutes.

Cancel Payment

A **CONFIRMED** message will display once the transaction has been completed.

Payments for Deal 267201

Total Down Payment: \$0.00

\$575.00 **CONFIRMED**

Email Receipt Void Print

New Payment Request
Amount
\$0.00 Add Payment

Internal Notes

Print



A cash receipt will be generated in Lightyear for the transaction.

Receipt #	Date	Received From...	Status	Receipt Amt	Pmt Method	Co	Loc	Draw/Source	Depo:
553746	01/09/26	Abel Harrison	Oper	2000.00	Check	1	1	Receipts	
553748	01/21/26	SCRIBNER,SUZY FLAGSHIP CREDIT A	Oper	1000.00	AR Check	1	1	Receipts	
553750	01/22/26	CAMPBELL,AARON	Oper	575.00	Credit Card	1	1	Receipts	

Highlighted Total 575.00

Card on File

When dealership employees process a payment, they can save the credit card number to the customer's account. The sensitive credit card information is stored securely through Global Pay – iService never sees card numbers, simply storing an identifier Global Pay uses to locate the card.

Select the **Save Card for Future Payments** checkbox to store the credit card number securely.

Payments for RO# 368532

Remaining Quote Balance: \$1056.11
of Quote total: \$1056.11

REPAIR ORDER: 368532 CREATED: 10/7/24, 3:54
\$500.00 Created: 10/7/24, 3:54 Delete

Choose how customer will pay
Describing how to use this

Swipe / Tap Card Text Customer Manually Enter Card

CHOOSE A CARD TYPE

Pay by Credit Card Pay by Debit Card

Save Card for Future Payments

CARD NICKNAME
Visa - **** 1234 Save

Your saved card will always display the card type and last 4 digits (e.g., Personal Visa **** 34)

CREDIT CARD PROCESSING FEE
\$5.00 (\$500.00 + \$5.00) Add Card Details

New Payment Request

AMOUNT
\$556.11 Add Payment

Close

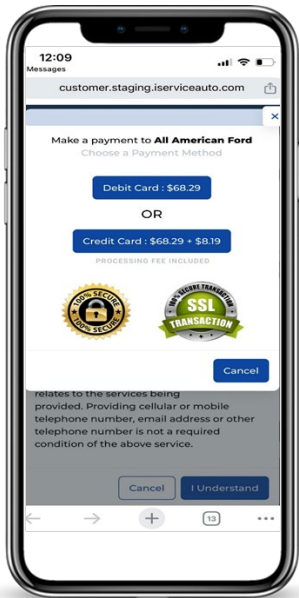


Text to Pay

A user can elect to send a text to pay request to a customer.

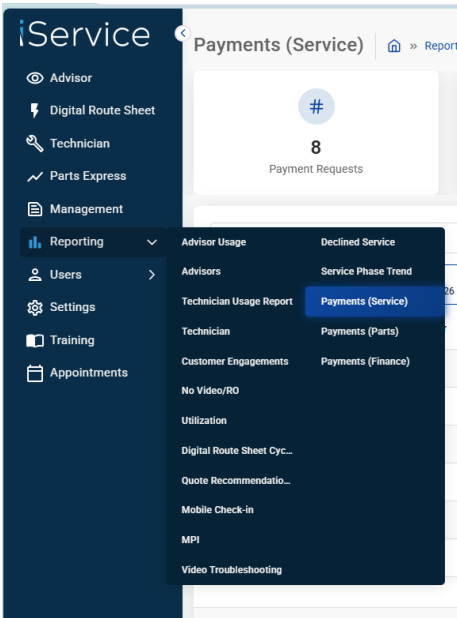
ISERVICE: Your invoice is ready for payment. Please click below to pay your bill.:<http://isre.us/P69ECJ> Txt STOP to OptOut. Msg&Data Rates Apply

The customer will select payment by debit card or credit card. Processing fees will appear based on Payment settings. The customer will then manually enter the card number and select the green **Pay** button to process the payment.



Reconciliation Process – Reporting

There are three reports that can be used to aid in the reconciliation process for a cashier or accounting office. To locate the reports, select from the left navigation **Reporting**, then select the report for the desired department **Payments (Service)**, **Payments (Parts)**, or **Payments (Finance)**.



The Payment reports will default the current system date in the **Transaction Date** field. A user can opt to select a transaction date range.

Payments (Service) | Reporting | Payments (Service)

#

8

Payment Requests

🛒

\$1,190.17

Payments Total

⊖

\$1,190.17

Refunds Total

💰

\$0.00

Net

💰

\$0.00

Processing Fees Collected

Search

Add Filter Transaction Date: 01/01/2026 to 01/31/2026

Transacti...	RO Number	Customer	Total	Balance	Processin...	Type	Advisor	Processed By	Transacti...	Card Type	Paid Via	Last Four Dig...
1/26/2026, 1:07:56 pm	1130343	Bri Borchardt	\$71.35	\$62.04	\$9.31	Payment	Chandler Bing	Tracy Callahan	000000767...	visa	Terminal	0011
1/26/2026, 1:10:42 pm	1130343	Bri Borchardt	(\$71.35)	-	-	Void	Chandler Bing	Tracy Callahan	000000767...			
1/26/2026, 4:04:45 pm			\$71.42	\$62.10	\$9.32	Payment		Tracy Callahan	000000767...	visa	Terminal	0011
1/26/2026, 4:05:19 pm			(\$71.42)	-	-	Void		Tracy Callahan	000000767...			
1/15/2026, 3:03:15 pm	1130331	RJ	\$99.00	\$99.00	\$0.00	Payment	ADVISOR AutomatedTe sts	iService Team	000000767...	Visa	Dealer Entry	1111
1/15/2026, 3:03:20 pm	1130331	RJ	(\$99.00)	-	-	Void	ADVISOR AutomatedTe sts	iService Team	000000767...			

Amount: Refunded Amount:

Export: [Excel](#) [CSV](#) Total Records: 16



To reprint a receipt for a card transaction, select the printer icon at the end of a transaction row. A print dialog box will appear to print the customer's receipt.

Print ?

Total: 1 sheet of paper

Printer

Brother MFC-J4335DW Printer v

Copies

1

Pages

All

e.g. 1-5, 8, 11-13

Payment Receipt

Customer: Bri Borchardt
 Phone: (608) 628-9598
 Vehicle: 2024 NISSAN ROGUE SV

Payment for Repair Order 1130343
 Transaction ID: 00000767856
 Date: 1/26/2026, 1:07:56 PM
 Card Number: 0011
 Card Type: visa
 Amount Paid: \$71.35
 Refunded Amount: \$71.35

For users that would like to **Export** the report there are options to export to either a CSV or Excel format, from the bottom left of the Payment report window.

Export: Excel CSV

Report Column Headings:

Type – whether the transaction was processed as an actual Payment, Refund or Void transaction

Processed By – this will denote the logged in user that processed the payment request from a terminal, or it will show **Cust App** when a payment request was processed via text request.

Transaction ID – the transaction id that is provided by the credit card processor as a reference for the credit card transaction

Paid Via / Collection Method – this will indicate how the transaction was processed, whether by Terminal, Dealer Entry or Customer App.

Payment Setups and Permissions

The settings and permissions for the Payment solution can be found in iService.

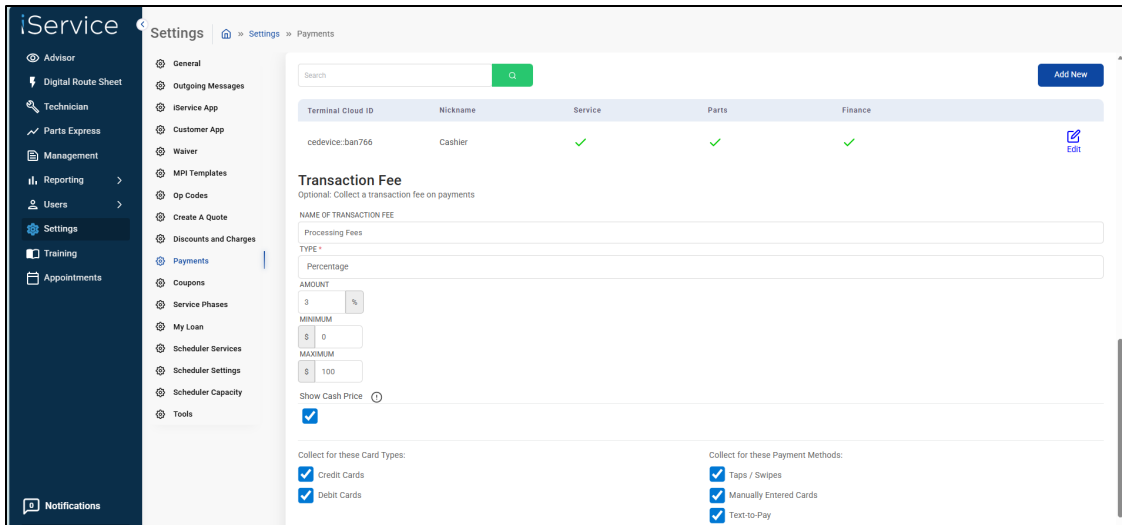
Setup Transaction Fees

Access the Payments setups by selecting **Settings > Payments** from the left navigation.

To configure the transaction fees to collect at the time a transaction is processed, scroll down to the **Transaction Fee** section.

- Enter **Name of Transaction Fee**
- Select how the fee should calculate, **Flat** amount or **Percentage** of the total amount
- Enter the percentage number of flat amount in the **Amount** field
- Enter **Minimum** or **Maximum** values if applicable
- Select the type of card transaction, the fee will be associated with **Credit Card** and/or **Debit Card**
- Select the collection method the fee will be applied if used, **Taps/Swipes**, **Manually Entered Cards**, or **Text-to-Pay**





Permissions

General Access

Permission	DealerBuilt Admin	Manager	Service Advisor	Parts Agent	Sales Agents & Sales Managers
Finance Payments	✔	✔	✘	✘	✔
Parts Payments	✔	✔	✘	✔	✘
Repair Order Payments	✔	✔	✔	✘	✘

Actions

⚙️ means configurable per-user by someone that has Manager access in iService.

Permission	DealerBuilt Admin	Manager	Service Advisor	Parts Agent	Sales Agents & Sales Managers
Text Payments	✔	✔	✔	✔	✔
Process Refunds	✔	✔	⚙️	⚙️	⚙️
Manual Payments (GlobalPay)	✔	⚙️	⚙️	⚙️	⚙️
Edit Processing Fees	✔	⚙️	⚙️	⚙️	⚙️



Configurable Settings Details

Setting	Default	Where to Configure
Process Refunds	Off	User edit screen → "Process Refund" checkbox
Manual Payments	On	User edit screen → "Allow Manual Payments" checkbox
Edit Processing Fees	On	User edit screen → "Edit Processing Fees" checkbox

Note: Manual Payments setting only applies when GlobalPay is the active payment provider.

Reporting

Permission	DealerBuilt Admin	Manager	Service Advisor	Parts Agent	Sales Agents & Sales Managers
iPay Report	✓	✓	✓	✗	✗
Finance Report	✓	✓	✗	✗	✓
Parts Report	✓	✓	✗	✓	✗

Note: Technicians have no access to anything Payments.

