

Payment Processing Guide



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CACO, Inc. • (800) 552-5278 • support@cacoinc.com

Setting Your Payment PIN

Your account payment PIN can be set up by accessing the LOGIN IDS tab on the left side menu.

Right click on the account ID for which you would like to set up the PIN number and click CHANGE on the menu that appears.

TEST CUSTOMERS	•	Login ID Search 🔯				
Online Service Center			Login ID Search			
Manage Clients Manage Quote/Order FAB Order Status Account Statement -) Admin Defaults Logo Payment Types View FAB Discounts *) (Client Discounts		Last Name Z Customer User ID Mode All V Show Inactive ID's		<u>CHIJKFI</u>	<u>M N O P Q</u>	<u>R S T U V W X Y</u> (Find Match)
Login IDs		First Prev Page 1 of 1	1 (1 Record) Next Last	Left-Click to View	w, Right-Click f	or Options
Change Password My Bookmarks		User Name 🔺	User ID	Mode	IA	Customer
			Inquire Change Copy	ULTRA		3

Set your PIN number on the CHANGE LOGIN IDS screen. You will need to enter this PIN number whenever you are ready to make a payment.

Once your PIN information has been entered, check that DEFINE PAYMENT TYPES option is set to YES. This will allow you to add payment information to your account. Click OK to save information.

TEST CUSTOMERS	CHANGE Login ID 🛛
Online Service Center	CHANGE Login ID
Manage Clients Manage Quote/Order FAB Order Status Account Statement — Admin Defaults	User ID master Password ••••••• First Name TEST CUSTOMERS Last Name
Logo Payment Types View FAB Discounts Client Discounts Login IDs Change Password	ACCESS: Deactivate Login ID Clients
My Bookmarks	Show Costs Dealer Admin Default View Dealer Send to Fabricator Account Balance Define Payment Types Yes Access Orders Entered By Others EAB Orders Entered By Others Comparison of the second
	FAB Order Status OK Cancel

Adding Payment Information

In order to add payment information, make sure that you have selected YES on the DEFINE PAYMENT TYPES option under LOGIN IDS. See instructions above in Setting Your Payment PIN.

To add payment options to your account, click PAYMENT TYPES on the left side menu and select add. Online payment information can be added by credit card or by ACH. You are able to add multiple forms of payment to your account if desired.

TEST CUSTOMERS @	Payment Information Search		
Online Service Center		Payment Information Search	
Manage Clients		0 Records	
Manage Quote/Order FAB Order Status	Description	Last4	FAB Authorized
Account Statement Admin Defaults Logo Payment Types View FAB Discounts Client Discounts Login IDs Change Password		Add	

Select the payment type you would like to set up on the drop down menu. Complete the payment setup by entering the required information and clicking SAVE.

Please note your payment information will be maintained by a secured payment processor. CACO will only be provided with your payment type, last 4 of the account number and expiration date in the case of credit cards.

TEST CUSTOMERS	Payment Infor	rmation Search 🛛		
Online Service Center			Add Payment Profile	×
Manage Clients				
Manage Quote/Order	1			
FAB Order Status			New Payment V Save - FAB Authorized V	
Account Statement		Payment Type	Credit or Debit Card V	
- Admin		Card Number		
Defaults				
Logo		Card Code		
Payment Types		Expiration	v - v	
View FAB Discounts				
 Client Discounts 		Billing Address	Information:	
Login IDs		First Name		
Change Password		Last Name	TEST CUSTOMERS	
My Bookmarks		Address		
		City		
		State	Not Selected V	
		Zip		
		Country	UNITED STATES	

Review Your Account Balance

To view your account balance, click the Account statement tab on the left side menu. Your accounts receivable totals are shown at the top left.All open invoices are listed. To view an invoice, click on the invoice number. You can search for a specific invoice by using the search function on the top right corner of the screen.

			Acc	ount Balance Status			
Manage Clients Manage Quote/Order FAB Order Status Account Statement Admin Change Password My Bookmarks	A/R Totals \$ Current 398.00 31 Days 0.00 61 Days 0.00 91 Days 0.00 121+days 0.00 Unapplied 0.00 Email Accounting: custor	Credit I Open Or Less Dep Order Bala Plus Invo Total Outstan Available I	imit \$ 2,000.00 ders \$ 156.00 osits \$ 0.00 nces \$ 156.00 oices \$ 398.00 ding \$ 554.00 i.imit \$ 1,446.00	Invoice Date Order Sidemark PO Include Paid	to		Find Match
		First Prev	Page 1 of 1 (1R	ecord) Next La	st Left-Click to V	iew Invoice	
	Invoice -	Due Date	Order	Sidemark	PO	Total	Balance
	THVOICE -						

Make Invoice Payments

To make payments on invoices, click MAKE PAYMENT* to indicate the amount you will be paying on the invoice.

Payments can be made through your customer portal via credit card or bank information. CACO, Inc. will make adjustments to your balance for payments made by phone, fax, email or for payments received in the mail.

*Before making payments, you must set up your payment information. See Setting Your Payment PIN and Adding Payment Information below for instructions.

TEST CUSTOMERS	Account Balance Statu	s 🛛							
A Online Service Center	Account Balance Status								
Manage Clients Manage Quote/Order FAB Order Status Account Statement	A/R Totals \$ Current 398.00 31 Days 0.00 61 Days 0.00	Credit Limit \$ Open Orders \$ Less Deposits \$ Order Balances \$	2,000.00 156.00 0.00 156.00 0 Or	oice to to					
Admin Change Password My Bookmarks	91 Days 0.00 121+days 0.00 Unapplied 0.00 Email Accounting: cus	Plus Invoices \$ Total Outstanding \$ Available Limit \$ tomerservice@cacoinc.com	398.00 Sidem 554.00 1,446.00 Include	ark		Find Match			
		First Prev Page	1 of 1 (1 Record) Next	Last Left-Click to Vie	ew Invoice				
	Invoice 💌	Due Date Or	rder Sidemark	РО	Total	Balance			
	377422	03/05/2022 49	2569 021522	TEST 021522	\$ 398.00	\$ 398.00			
		Invoice	Listing Current Statement	Make Payment	-				

Select invoices to for payment and the click the SELECT PAYMENT button.

Online Service Center						Select 1	Invoice to Pay				
Manage Clients Manage Quote/Order FAB Order Status Account Statement Account Statement Admin Defaults Logo Payment Types View FAB Discounts Client Discounts Login IDs Change Password	Created 03/05/2022	Terms 03/05/2022	Due Date 04/04/2022	Balance \$ 398.00	Terms \$ 0.00	Net Due \$ 398.00	Sales Order 492569	Sidemark 021522	Invoice 377422	Pay	Amoun
								i	Select Payme	ubtotal : ent Fee : Total : /ment	Cancel

Enter PIN on next page to access payment page.

Select saved payment method or add new payment method and click PROCSS to complete payment.

TEST CUSTOMERS (0)	Select Invoice to Pay		
A Online Service Center		Select Payment ×	
Manage Clients Manage Quote/Order FAB Order Status Account Statement	Created Ten 03/05/2022 03/05/ Late Payment Fee	a 398.00	Amount 398.00
+ Admin	Payment Amoun	t 398.00	
Change Password My Bookmarks		New Payment v Save - FAB Authorized v	
	Payment Type	e Credit or Debit Card V	
	Card Code		
	Expiration		
	Emai	I alexiael_2@yahoo.com	
	Billing Address In	formation:	
	First Name		
	Last Name	TEST CUSTOMERS	
	Addres	5	
	City	Y	
	State	Not Selected V	
	Zij	P	
	Country		
		Proceed Clo	
			\$ 398.00
			\$ 398.00
			Caricel

Making Payments for Deposits and Pay in Advance Accounts

Click the MANAGE QUOTE/ORDER to list sales orders. Right click on the order you need to make a payment on and then click on the Online Deposit on the menu that appears.

TEST CUSTOMERS (0)	Sales Order Search					
Conline Service Center				Sales Order Searc	h	
Manage Clients Manage Quote/Order FAB Order Status Account Statement Account Statement Defaults Logo Payment Types View FAB Discounts Counts C	Order Client Date 01/04/202 Entered By Select All	0 0 22 to			Client F Sidema Include Quot Include Orde Include Cancel	PO rk es ♥ ed ↓ Find Match
Client Discounts Login IDs	First	Prev Page	1 of 1 (6 Record	ls) Next Last	Left-Click to View,	Right-Click for Options
Change Password	Order 🔹	Entered	Client	Status	Client P	O Sidemark
My Bookmarks	492569	03/05/2022		INVOICED	TEST 021	522 021522
	492568	03/05/2022			TEST 030	422 030422
	490652	02/07/2022		Inquire	SIFDJSIC	DPDF
	489325	01/18/2022		Сору		TRGDFJK;M;
	488914	01/11/2022		View		TEST2
	488878	01/11/2022		Online Deposit	TEST12	34
				Prepare Client P	roposal	

A new window will appear that will allow you to use a previous saved payment method or add a new one.

TEST CUSTOMERS	Sales Order Search		
a Online Service Center		New Payment for Sales Order 492568	×
Manage Clients			
Manage Quote/Order	Order	Payment Amount 156.00	
FAB Order Status Account Statement	Client	Total Order 156.00	
Admin	Date 01/04/	Total Deposits 156.00	
Defaults	Entered By Select	Balance 0.00	
Logo Payment Types		New Payment V Save - EAR Authorized	
View FAB Discounts			Find Match
 Client Discounts 		Credit or Debit Card	
Login IDs	Fir	Card Number	ons
Change Password	Order 🔻	Card Code	Sidemark
My Bookmarks	492569	Expiration v - v	021522
	492568	Email alexiael 2@vahoo.com	030422
	490652		
	489325	Billing Address Information:	TRGDFJK;M;
	488914	First Name	TEST2
	488878	Last Name TEST CUSTOMERS	
		Address	
		City	
		State Not Selected V	
		Zip	
		Country UNITED STATES	
		Proceed	Clos

Online Deposits can be made anytime an order is in the Internet Hold or Credit Hold. Please note Deposits or Partial Payments can only be accepted when requested or with pre-approved by the Credit department.