



# MANAGING YOUR CREDIT CARD

MARCH 2022

VERSION 2



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## 1. MANAGING YOUR CREDIT CARD

Payment options for ProSuite are handled in the My Firm Billing tab's **Secure Payment Manager**. One of two Payment Options can be selected:

- **Invoice** – Statements and invoices will be delivered via email on a monthly basis. A Statement contains all outstanding invoices and unallocated payments. The Invoice contains charged incurred for ProSuite in the previous month. You may also access these documents from the Account Summary tab.
- **Credit Card** – Your credit card is debited when a transaction/file is created in ProSuite.

The Secure Payment Manager ensures the secure storage and management of your office's credit card information.

The credit card payment method provides the following advantages:

- Receive automatic notification when your card's expiry date is approaching.
- Collect Rewards Program or Loyalty points from your credit card company.
- Increase efficiency by reducing month end reporting and payment processing in your office.
- Reduce use of stationery, postage and courier costs.
- Easily reconcile transactions opened with charges incurred.

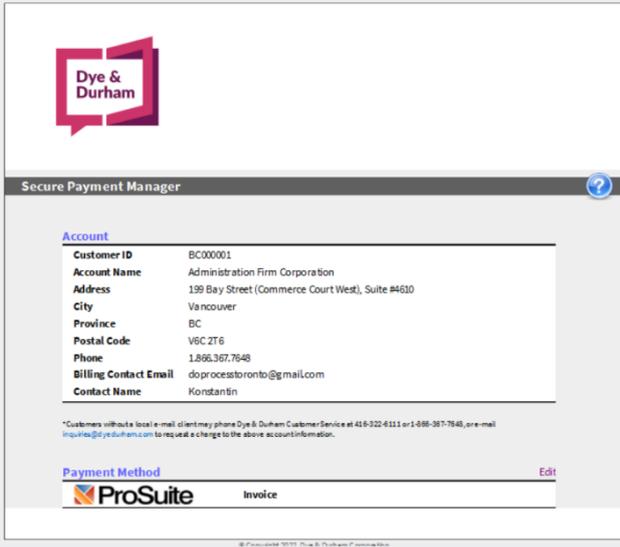
When displayed in the **Secure Payment Manager** window, your credit card number is partially masked and the expiry date for the credit card appears. Information for credit cards entered previously cannot be changed and credit cards cannot be deleted.

## 2. MANAGING PAYMENT METHODS

### 2.1. ACTIVATING THE CREDIT CARD PAYMENT OPTION

**Step 1 – Select Credit Card as the Payment Method:**

1. In the Payment Method section of the Secure Payment Manager, select the **Edit** link.



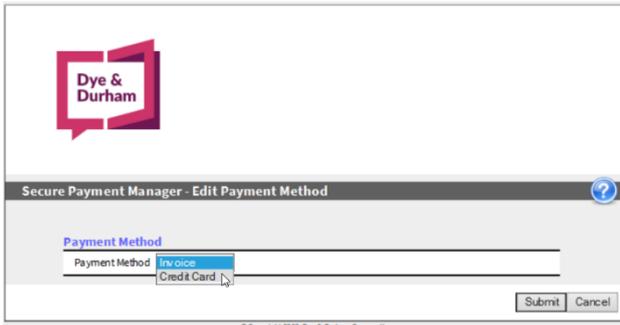
The screenshot shows the 'Secure Payment Manager' interface. At the top left is the 'Dye & Durham' logo. Below it is a header bar with the text 'Secure Payment Manager' and a help icon. The main content area is titled 'Account' and contains a table of account details:

Customer ID	BC000001
Account Name	Administration Firm Corporation
Address	199 Bay Street (Commerce Court West), Suite #4630
City	Vancouver
Province	BC
Postal Code	V6C 2T6
Phone	1.866.367.7648
Billing Contact Email	doprocesatoronto@gmail.com
Contact Name	Konstanfn

Below the table is a small note: '\*Customers without a local e-mail client may phone Dye & Durham Customer Service at 416-322-4111 or 1-866-367-7648, or e-mail [inquiries@dyeanddurham.com](mailto:inquiries@dyeanddurham.com) to request a change to the above account information.'

At the bottom of the account section is the 'Payment Method' section, which shows the 'ProSuite' logo and the word 'Invoice'. To the right of this section is an 'Edit' link.

2. On the **Edit Payment Method** popup, select credit card from the drop-down menu.



The screenshot shows the 'Secure Payment Manager - Edit Payment Method' popup. At the top left is the 'Dye & Durham' logo. Below it is a header bar with the text 'Secure Payment Manager - Edit Payment Method' and a help icon. The main content area is titled 'Payment Method' and contains a drop-down menu. The current selection is 'Invoice', and 'Credit Card' is visible in the dropdown list. At the bottom right of the popup are 'Submit' and 'Cancel' buttons.

The Secure Payment Manager screen changes to reflect the credit card payment method.



## Secure Payment Manager



### Account

<b>Customer ID</b>	BC000001
<b>Account Name</b>	Administration Firm Corporation
<b>Address</b>	199 Bay Street (Commerce Court West), Suite #4610
<b>City</b>	Vancouver
<b>Province</b>	BC
<b>Postal Code</b>	V6C 2T6
<b>Phone</b>	1.866.367.7648
<b>Billing Contact Email</b>	doprocessoronto@gmail.com
<b>Contact Name</b>	Konstantin

\*Customers without a local e-mail client may phone Dye & Durham Customer Service at 416-322-8111 or 1-866-367-7648, or e-mail [inquiries@dyeanddurham.com](mailto:inquiries@dyeanddurham.com) to request a change to the above account information.

### Payment Method

[Edit](#)

	<b>Credit Card</b>
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### Credit Cards

[\[-\] Add a Credit Card](#)

Type	Number	Exp. Date
Visa	4242***4242	10/33
Visa	4242***4242	06/29
Visa	4030***1234	04/24
Visa	4242***4242	07/27
Visa	4242***4242	04/31
Visa	4030***1234	04/25

### Products

[Edit](#)

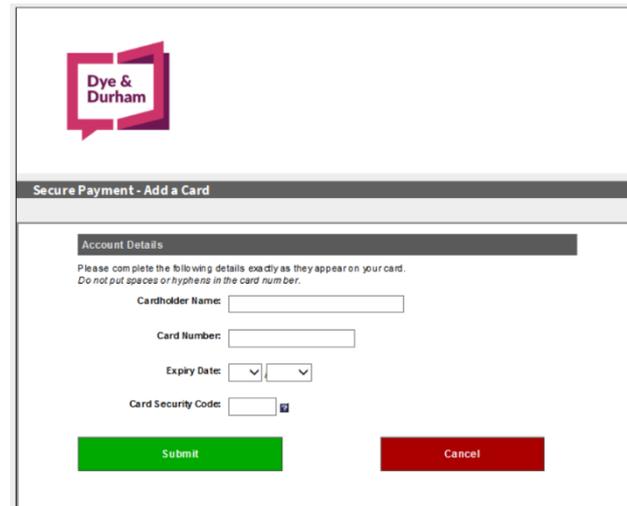
Product	Credit Card	Exp. Date	Status
	Visa 4242***4242	04/31	VALID

### Status Message Definitions

- **Valid**- The Credit Card has not expired and can be used with the associated product.
- **Invalid**- The Credit Card has expired or has been suspended and cannot be used with the associated product.
- **Not Assigned**- A Credit Card has not been assigned to this product. Please click Edit and select a card for the product.
- **Product Not Enabled**- This product is currently not enabled for this account. Please visit [www.doprocess.com](http://www.doprocess.com) to order the required products.

## Step 2 – Add Credit Card

1. In the **Credit Cards** section of the Secure Payment Manager window, click **Add a Credit Card** to access the **Add a Card** popup.
2. In the **Add a Card** popup, enter the information for the credit card and click **Submit** when you have finished. When the **Secure Payment Manager** window reappears, the credit card (with masking) and its expiry date are displayed.



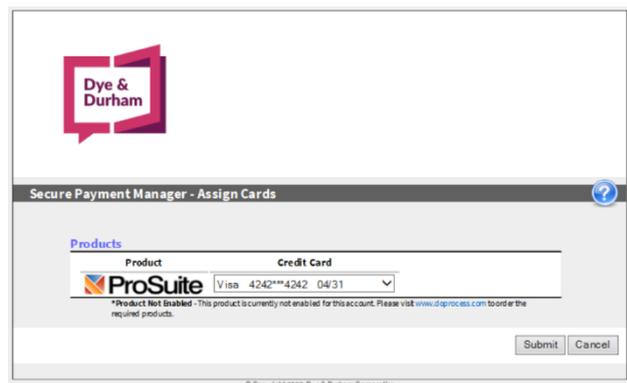
**Notes:** There is no limitation on the number of credit cards that can be entered.

The system will not accept expired credit cards.

VISA® and MasterCard® are accepted by Dye & Durham. You do not need to specify which credit card you are using; the system detects the card from the number.

## Step 3 – Assign Credit Card

1. In the **Products** section of the **Secure Payment Manager** window, click **Edit** to access the **Assign Cards** popup. Select the card from the drop-down list and click **Submit**.
2. When the **Secure Payment Manager** window reappears, the assignment is displayed along with the status of the card:



- **Valid** – The credit card has not expired and can be used.
- **Invalid** – The credit card has expired or has been suspended and cannot be used.
- **Not Assigned** – A credit card has not been assigned. Please select a card.

### 3. VIEWING AND EDITING YOUR OFFICE'S BILLING CONTACT INFORMATION

The **My Firm - Firm** tab contains a field for you to identify your office's billing contact. This field is pre-populated with names from the **My Firm – Personnel** tabs.

- Select the name of the person who is the billing contact for your office, and then save. If the billing contact is not in the selection list, add this person's name and email in the appropriate Personnel tab and then return to the Firm tab. This person will now appear in the billing contact drop down for selection.

The screenshot shows a software interface for managing firm data. The main window is titled 'Administrator Firm' and 'Type: MyFirm'. A navigation bar at the top includes tabs for 'Firm', 'Firm Personnel', 'Settings', 'Account Library', 'Mortgage Library', 'Adjustment Library', 'Undertaking Library', 'Holidays', 'Billing', and 'Unlock File'. The 'Billing' tab is active, displaying the 'Firm Reference Data' form. The form contains the following fields and values:

Field	Value
Lawyer Firm	Administrator Firm
2nd Line Name	Notary Public
3rd Line Name	
District	District of BC
PST Tax No	PST1234356
GST Tax No	845613595 RT0001HST
HST Tax No	PST12343568
Sole Practitioner	<input checked="" type="checkbox"/>
Billing Contact	Guest 70-1
Emergent Client ID	84403270-29BC-468D-9BCC-67D94356107F

A note on the right side of the form reads: 'Make sure that Contact data is correct. Enter 2nd and 3rd Letterhead Line if Required. Enter the Tax Number.'

If you require further assistance with managing your payment options, please contact Customer Service at 1-866-367-7648 during business hours.