

1. Log in to the virtual terminal and under the Clients tab select search
2. Change the Schedule drop down menu from "ALL" to "Schedule"
3. Locate the client you want to update and click on the edit icon

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Transactions

Reporting

Clients


Add


Search


Export


Import

Client Search

Merchant Name:

Selection: Value: Status: Schedule: Records:

Blank for all records

Search

First Name	Last Name	Consumer ID	Merchant ID	Next Trans	Amount	Status	Schd	Edit	Delete
James	Johnson		2000	2019-11-19	700.00	●	🕒	🔧	🗑️

NewVT

4. Under the Schedule tab, select the schedule that needs to be updated
5. Click on the red clock to edit the schedule

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Transactions

Reporting

Clients



Schedule Listings

Client | Payment Methods | All Trans | **Scheduled Trans** | Single Trans

 Johnson James

Schedule Definitions

Date	Consumer ID	Dog License	Transaction Notes	Frequency	Creator	Status	Edit
11/19/2019		12132		Monthly	forte1	A	🕒

6. Click on the "Entry Class Code" drop down menu and select the desired SEC code
7. Once the SEC code has been changed, click on the blue floppy disk to save the changes

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Transactions

Reporting

Clients


Add



Schedule Listings

Client | Payment Methods | All Trans | **Scheduled Trans** | Single Trans

 Johnson James

Schedule Definitions

Edit Schedule Definition 11/19/2019

Frequency: Payment Method:

Status: Entry Class Code:

Consumer ID:


