User - Payments Tab

> The Payments tab allows administrators to process user payments for various outstanding items such as lockers, parking permits, and violations. Its primary purpose is to facilitate phone-in payments, in-person transactions, and to assist users who are unable to complete the payment process themselves. This article is intended for administrative staff with payment processing permissions.

Setup and Configuration

This feature requires no special configuration to be used directly on the user profile, provided your foundational financial settings are established.

Admin Side: Administrators must ensure that the organization's payment gateway and item pricing have already been configured globally. For more details on these initial setups, please refer to the *Payment Gateway Configuration* and *Pricing & Lot Admin* articles.

User Side: Users can also process their own payments directly through the public-facing portal for most standard items and violations, provided they have an active account.

Using this Feature

Administrators can use the following instructions to navigate to a user's account and manually process an outstanding payment.

1. Hover over **User Management** and click **User Search**.
2. Enter the search criteria to find the specific user and click their **Username** from the search results to open their profile page.
3. Click the **Payments** tab to view a list of outstanding items, such as violations or permits.
4. Enable the checkbox next to each item you wish to include in the current payment.
5. Click on any item name highlighted in blue to view more detailed information. If you make any changes in the detail view, you must click the **Update** button to save them.
6. Click the **Proceed to Payment** button once all necessary items are selected.
7. Review the transaction summary on the Payments Due screen, click the **Payment Type** drop-down menu, and choose the correct payment method.
8. Click the **Submit Payment Information** button.
9. Verify that all payment details are correct on the final confirmation screen and click the **Confirm Payment Information** button.
10. Review the Transaction Details screen. You may click **Adjust** to modify the payment total (e.g., applying a discount) or click **Cancel Transaction** to abort the payment process.
11. Click the **Process Manually** button to complete the transaction.

> For credit card transactions utilizing an integrated payment gateway, the final step may occur automatically without needing to click the manual processing button. Once the payment is accepted, a transaction

confirmation number will be displayed.

While selecting items in step 4, you have the option to click the **Remove** button next to an item. The remove action is permanent and cannot be undone. Use this with extreme caution, as the item will be completely removed from the user's account, not just excluded from the current transaction.

Best Practices and Considerations

- **Double-check before confirming: Always verify the selected items and payment amount with the user before confirming the payment information.** Reversing a finalized transaction is a much more involved administrative process.
- **Understand manual versus automatic processing: Be aware of how your system is configured.** If a payment gateway is active, credit card transactions are typically processed in real-time. Manual processing is specifically used for logging cash, cheque, or other offline payment methods.
- **Use the cancel button to abort: If there is any uncertainty or an error is discovered before final processing, use the Cancel Transaction button.** This safely exits the workflow, leaving the items on the user's account as outstanding without causing any financial impact.

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