Training: CC.com

Learn how you void or refund receipts from Aristotle web forms as well as manage payment plans.
Agenda:
Managing RPAC Receipts

• Login and access Reports
• Single transactions
  – Voids/Refunds
• Payment Plans
  – Refunds
  – Review expired credit cards
  – Modify/edit or cancel a payment plan
Login to:
Campaigncontributions.com
Report Options:

• Daily Settled
• Summary Reports
• Transactions
• Payment Plans
• Push Reports

*You will not use the other options listed*
## Daily Settled Summary Report

**Date From:** 3/1/2017  
**Date To:** 3/23/2017

**Site:**  
- All Sites
- NAR PAF
- National Association of REALTORS
- National Association of Realtors AMP PAF
- National Association of Realtors AMP RPAC

**Output Type:** HTML

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### Fees are Invoiced

<table>
<thead>
<tr>
<th>Account No.</th>
<th>Date</th>
<th>Type</th>
<th>Transaction Count</th>
<th>Visa/MasterCard</th>
<th>Amex</th>
<th>Discover</th>
<th>ECheck</th>
<th>Gross Amount</th>
<th>Percent Fee</th>
<th>Service Fee</th>
<th>Net Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>3/19/2017</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Status Summary Report

![Status Summary Report]

<table>
<thead>
<tr>
<th>Status</th>
<th>Number of Transactions</th>
<th>Total Amount</th>
<th>Minimum Amount</th>
<th>Maximum Amount</th>
<th>Average Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Authorized</td>
<td>4</td>
<td>$465.00</td>
<td>$15.00</td>
<td>$250.00</td>
<td>$116.25</td>
</tr>
<tr>
<td>Settled</td>
<td>150</td>
<td>$48,037.84</td>
<td>$7.55</td>
<td>$3,000.00</td>
<td>$320.25</td>
</tr>
<tr>
<td>Refunded</td>
<td>1</td>
<td>$-2,250.00</td>
<td>$-2,250.00</td>
<td>$-2,250.00</td>
<td>$-2,250.00</td>
</tr>
</tbody>
</table>
Transaction Report - Details

- Once you run the Transaction Report for the criteria you wish, your results will look something like this:

<table>
<thead>
<tr>
<th>Options</th>
<th>Transaction No.</th>
<th>Site Name</th>
<th>Status</th>
<th>Amount</th>
<th>Net Amount</th>
<th>Fee Method</th>
<th>Transaction Type</th>
<th>Transaction Date</th>
<th>Settled Date</th>
<th>Disbursement Date</th>
<th>Check No.</th>
<th>First Name</th>
<th>Last Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1653977</td>
<td>National Association of REALTORS</td>
<td>Docined</td>
<td>90.01</td>
<td></td>
<td>Invoked</td>
<td>AJ360</td>
<td>3/23/2017 1:11:02 AM</td>
<td></td>
<td></td>
<td>Peter</td>
<td>Ortega</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>1653977</td>
<td>National Association of REALTORS</td>
<td>Authorized</td>
<td>100.00</td>
<td>100.00</td>
<td>Invoked</td>
<td>AJ360</td>
<td>3/23/2017 9:13:22 AM</td>
<td></td>
<td></td>
<td>Cyndi</td>
<td>Bell</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>1653998</td>
<td>National Association of REALTORS</td>
<td>Authorized</td>
<td>100.00</td>
<td>100.00</td>
<td>Invoked</td>
<td>AJ360</td>
<td>3/23/2017 9:14:03 AM</td>
<td></td>
<td></td>
<td>Brent</td>
<td>Howard</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>1654027</td>
<td>National Association of REALTORS</td>
<td>Authorized</td>
<td>250.00</td>
<td>250.00</td>
<td>Invoked</td>
<td>AJ360</td>
<td>3/23/2017 11:38:13 AM</td>
<td></td>
<td></td>
<td>Andrew</td>
<td>Asbury</td>
<td></td>
</tr>
</tbody>
</table>

- Use the options on the left to refund, view summary details or additional information.
Reoccurring Report

- Options:
  - Search
  - Expired Cards
  - Processed
  - Push Reports
Reoccurring – Search

If you do not select anything in the search criteria all payment plans will pull up when you run the report.
Reoccurring – Expired Cards

Recurring Report - Expired Credit Card

Expired Cards Processed For Month: 03  ▼  Year: 2017  ▼

Select Sites to Include:
- All Sites
- NAR PAF
- National Association of REALTORS
- National Association of Realtors AMP PAF
- National Association of Realtors AMP RPAC

Output Type: HTML ▼  Rows Per Page: 100

Generate Report  Default
Reoccurring – Processed

- This report will show you all the payments processed during the selected month/Year.
Reoccurring – Push Reports

Setup Push Reports to automatically receive reports from the system:

- Confirm your email
- Determine what you want the report to include
- Save Settings
Other Important Information

• If a transaction is initially declined the system will try again 5 days later. If declined again, it will try again the next time the payment plan is scheduled.

• Refunds you process in cc.com will NOT automatically show up in Aristotle. You will need to set up a quick entry to show the refund.

• Additionally updates will be coming to cc.com in 2017 – stay tuned!
Thank you from Aristotle

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