

Adding Level 2 Credit Card Processing

Last Modified on 05/29/2026 11:22 am EDT

To add Level 2 Credit Cards for processing, follow the steps below.

1. Navigate to the Customer Payment Methods screen > Credit Cards Tab.
2. Next to **Procurement Code**, enter the 17 character code (letters and numbers).
3. Next to **P-Card Allowed Use**:
 - a. Select **Invoice** if you want the P-Card used for an invoice.
 - This will send the invoice number, tax amount, and procurement code to the Forte transaction.
 - b. Select **Advance Deposit** if you want the P-Card used for an advanced deposit.
4. Select **Save**.

Customer Payment Methods - SODb1 - Forte

Customer Number: 10105
Testing Bug 21531
1234 Bug Ln
Statesville, NC 28625
(704) 880-2377

Bank Accounts | Credit Cards

Cards On File: MAST

Card Number *: ****4444

Expiration *: 10 / 29

Card Type *: MAST

Procurement Code: _____ P-Card Allowed Use: Invoice Advance Deposit

Payment Method *: MasterCard

Auto Processing: Recurring Non-Recurring

Hold Day: 1 Max Amount: \$0.00

Days Past Inv Date: 0

Auto Bill To Recurring: _____

New Save Delete Close

By entering the Procurement Code and selecting the use for the P-Card, you will see if it is allowed for invoice payments or advanced deposit payments. If the procurement card is not allowed to be used, you cannot save or submit the payment.



NOTE: Any messages in SedonaOffice for procurement cards use “allow” or “allowed” instead of “authorized” to avoid confusion with status messages related to Forte.