



Perceptive Software
Measurable Results

OpenEdge® Integration



Credit card payment integration

Orion Clients Can Accept Credit Card Payment with OpenEdge Integration

Modern law firms need streamlined financial management and clients increasingly want the option of paying by credit card. Now with the seamless interface between Orion Financial Management and OpenEdge, effective solutions can be found for both needs.



Using the combined power of Orion and OpenEdge, firms can be more profitable, improving and speeding up their collections and cash flow. In addition, financial tasks can be done more accurately and securely which has both internal and external benefits for the firm.

Accepting credit/debit cards with Orion, powered by OpenEdge, adds a host of benefits. Here are just a few reasons why firms choose to accept credit/debit cards from their clients:

Ease of Use

- Credit/Debit card processing works virtually the same as any other payment type. With just a few simple steps for setup, you're able to enter a payment, trust or retainer deposit using the same interface that you've come to know.
- Authorization is received in seconds and the money is deposited into your bank account within 24 hours.
- Upon receiving authorization, the client ledger is updated, the associated deposit into bank reconciliation occurs (*identifying the source of the entry*) and the general ledger reflects the relevant activity.

AR Accounting Transactions

Record # 47708 Posted: Deposited

Date Fri, 10/20/2014 COOKIE FACTORY

Client-Matter 001546-000014 1030 Grant Property Purchase Open

Code PMT

Bank Code 1 Fidelity - Operating Account Processed Electronically

Amount \$121.30 Retainer/Trust Balance \$4,960.00 * \$0.00

Check # CARD Received from/Paid to

Description Payment, Card #: 1119, Trans ID: 1, Approval Code

Transaction Details

Card Type: Credit Card
Card #: ###1119
Amount Charged: \$121.30
Status: Authorized
Gateway Time: 10/20/2014 8:44:34 PM
Gateway ID: 1
Gateway Response: Successful transaction: The transaction completed successfully.
Bank ID: 012293218703522
Bank Approval: OK426C

Invoice	Date	Matter	Invoice Total	Paid
98100274	10/18/2004	000014	\$12,221.30	\$12,100.00

Apply to: Client Matter \$12,221.30 \$12,100.00 \$121.30 \$121.30 \$0.00

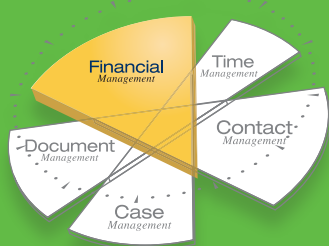
Not only is it easy to distinguish credit/debit card transactions from other types of transactions, but access to key elements of these transactions is always available.

"Orion's software has proven to be an asset to McIntyre throughout the years. I was very impressed with the new OpenEdge® integration, which immediately allowed me to reduce steps in the credit payment process and also gave complete visibility of our daily transactions. The install for the newest upgrade of the Orion system was quick and easy, while the training for OpenEdge was user-friendly. Both Orion and OpenEdge have phenomenal customer service and I would recommend this new feature to others. Orion is truly a one-stop-shop software program for law firms."

Michelle Hecht

Account Specialist

**McIntyre, Panzarella,
Thanasides, Bringgold
& Todd, P.L.**



Increase Cashflow & Reduce AR

Get paid faster. Recent studies have shown that by accepting credit/debit cards, firms are able to greatly reduce both collection time and costs associated with receiving checks sent via mail.

According to a PayPros Legal (now OpenEdge) survey, 74.4% of law firms reported improved cashflow as a result of accepting credit cards.



- Accepting credit cards led to a mean of \$831 additional billing per month = nearly \$10,000/year.
- Helpful Reductions. Client tension around payment was reduced by 55.8% and administrative work decreased by 41.4%. And 45.7% of firms reported that accepting credit cards was a business development advantage because it gave clients what they wanted.
- Accepting credit/debit cards also eliminates the hassle of dealing with bounced checks and the associated bank fees.



Enhanced Security

- MagTek® IPAD® is used to securely encrypt the credit/debit card data from the very moment the card is swiped. Cardholder data is never stored locally at the firm (*on paper or electronically in Orion*).
- Transactions are secure and PCI compliant. OpenEdge is so confident in their security strategy that law firms using Orion can apply for their breach guarantee of up to \$200,000.00 in breach reimbursements and coverage.

OpenEdge offers payment technology, products and services designed specifically for the legal industry. They understand the unique needs and concerns of law firms accepting electronic payments. Everything they do is intended to help firms improve cash flow and meet state bar requirements.

Affordable Processing

- By selecting OpenEdge, you'll find **pricing both fair and highly competitive.**
- There are **no contracts.**
- A pay-as-you go program, OpenEdge charges **no monthly fees, no monthly minimums and no cancellation fees.**

OpenEdge is a State Bar Credit Card Compliance Specialist

- With more than 55,000 businesses (*many law firms*) processing credit cards with OpenEdge you can expect assistance establishing processing that meets state requirements regarding client trust accounts, costs, advances, etc.
- OpenEdge maintains a database of more than one hundred state bar opinions that cover issues ranging from the invasion of trust accounts by your lending institution, prohibitions on credit card acceptance by specific states on certain types of services (*e.g. divorce and criminal action*), whether your state restricts the use of credit/debit cards for retainer payments or state restricts charging a fee to your clients for credit/debit card transactions.

For more information about Orion's integration with OpenEdge or other products visit
www.orionlaw.com or email info@orionlaw.com