

How to Process Credit Card payments without Convenience Fee

Note: This feature is only available in 21.2

Below are the steps in processing credit card payments without convenience fee

1. Create a new customer. Please refer to <http://help.irelyserver.com/display/DOC/How+to+Add+a+Customer>
2. Click checkbox behind Exempt from Portal Credit Card Fee to enable

Customer - 1005894 Customer - CC

New Save Search Delete Undo Additional Close

Entity Customer General Locations Contacts Split History Messages Activities Attachments Audit Log Entity Type Custom Crop Insurance

Detail Misc Pricing Taxing Grain Agrimine Patronage License Help Desk Software Transports Commission Buyback Contracts Field xRef

Credit Details

Credit Limit 999,999.00 AR Balance 0.00

Credit Stop Days 999,999 Credit Limit Reached

Credit Code Normal

Active ☒ PO Required ☐ Credit Hold ☐

Exempt from Portal Credit Card Fee ☒

Budget Details

Budget Begin Date

Monthly Budget 0.00 No of Periods

Budget Schedule Tie Budget to Customer Aging ☐

Import Budget Schedule

Credit Cards

Add Remove Export View Filter (F3)

Type	Credit Card	Expires	Active
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Statement Detail ☐ Statement Credit Limit ☐

Statement Format

Service Charge

Last Service Charge

Apply Prepaid Taxes ☐

Apply Sales Tax ☐

Calc Auto Freight ☐

Update Quote

Disc Schedule

Print Invoice

Link Customer No

Referred by Customer

Special Price Group ☐ Exclude Dunning Letter ☐

Received Signed License ☐ Print Price on Pick Ticket ☐

Include Name in address ☐

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3. Click **Save** button to save the latest changes on newly created Customer
4. Add a Credit Card, please refer to <http://help.irelyserver.com/display/DOC/How+to+Add+Credit+Card+to+Customer>
5. Create an Invoice. Please refer to <http://help.irelyserver.com/display/DOC/How+to+Create+Standard+Invoice>
6. Click the **Sales | Activities | Receive Payments**. This will open the Receive Payments Search screen.
7. Click the **New** button to open a new Receive Payments screen.

Receive Payments -

New Save Search Delete Undo Recalculate Print Email Post Credit Card Close

Details Post Preview Post History Audit Log Attachments

Type Cash Receipts Location 0001 - Fort Wayne Record No Created On Save

Customer Date Paid 13/01/2022 Total AR 0.00

Payment Method Bank Account 253624539656 Forex Rate Type Spot 1.00

Amount Paid 0.00 Check No Forex Rate

Unapplied Amount 0.00 Currency USD Apply on Account ☐ Apply to Budget ☒

Notes Bank Transaction No EFT Budget ☐ Thru Date

Select Top 100 ☒ Clear All ☐ View Invoice ☒ Remove ☒ Export ☒ View ☒ Filter (F3)

Location	Discount Date	Due Date	Invoice Date	Days C	Invoice	Scale	Custom	Terms	Invoice Total	Discount Availa	Discount Taken	Write Off Amou	Write Off Account	Interest	Amount Due	Payment
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Some of the fields, like **Location**, **Bank Account**, **Currency**, and **Date Paid**, are populated by default. You can still change the value of these fields if necessary. The grid area is filtered by the current Location.

8. Fill out the **Customer**, **Location**, **Currency**, and **Payment Method** fields. These are the required details on this screen. Refer to [Receive Payments | Field Description | Header Details](#) to help you in filling out the fields.

9. Select Credit Card under **Payment Method** dropdown

The screenshot shows the 'Receive Payments' window for '1005894 Customer - CC'. The 'Payment Method' dropdown is open, and 'Credit Card' is selected. The 'Amount Paid' is 100.00, and the 'Unapplied Amount' is 0.00. The 'Notes' field contains 'Manual Credit Card'. The 'Payment Method' dropdown is set to 'Credit Card'.

10. On grid area, select the invoice/s to be paid. Convenience Fee column will be calculated to 0.00.

The screenshot shows the 'Receive Payments' window for '1005894 Customer - CC'. The 'Payment Method' is 'Credit Card'. The grid area shows a table with columns: Location, Discount Date, Due Date, Invoice Date, Days, Invoice Scale, Custom, Invoice Total, Discount Available, Convenience Fee, Discount Taken, Write Off Amount, Write Off Account, Interest, Payment, and Amount Due. The 'Convenience Fee' column is highlighted, and its value is 0.00.

11. Click the **Post** button or Credit Card then **Process Credit Card**

a. **Post Button**

i. Click Post button and prompt will be displayed once transaction is approved or disapproved.

The screenshot shows the 'Receive Payments' window for '1005894 Customer - CC'. An 'Approval' dialog box is displayed in the center, with the text 'The transaction was approved.' and an 'OK' button. The background window is dimmed.

ii. Click **OK** button and Receive Payment will be posted.

b. **Process Credit Card**

- i. Click Credit Card then **Process Credit Card** and prompt will be displayed once transaction is approved or disapproved.

Receive Payments - 1005894 Customer - CC

Details | Post Preview | Post History | Audit Log | Attachments

Type: Cash Receipts | Location: | Record No: RCV-502

Customer: Customer - CC | Date Paid: 11/01/2022 | Total AR: 100.00

Payment Method: VISA ending in 0006 | Bank Account: 253624539656 | Forex Rate Type: | Forex Rate: 1.00

Amount Paid: 100.00 | Check No: | Apply on Account: ☐ | Apply to Budget: ☐

Unapplied Amount: 0.00 | Currency: USD | EFT Budget: ☐ | Thru Date: |

Notes: | Bank Transaction No: |

☒ Select Top 100 | ☐ Clear All | ☐ View Invoice | ☒ Remove | Export | ☒ View | Filter (F3)

Location	Discount Date	Due Date	Invoice Date	Days C	Invoiced	Scale 1	Custom	Terms	Invoice Total	Discount Availa	Discount Taken	Write Off Amou	Write Off Account	Interest	Payment	Amount Due
0001 - Fort ...	10/01/2022	10/01/2022	3	50-1...	Du...				100.00	0.00	0.00	0.00	\$1515-0000-000	0.00	0.00	100.00

100.00 0.00 0.00 0.00 0.00 0.00 100.00

0.88% | Saved | Page 1 of 1 | Refresh

- ii. Click **OK** button and Receive Payment will be saved.

12. Click the **Print** button to see a preview of the Invoice report.

Report Viewer - Payment Receipt

Archive | Close

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iRely LLC
4242 Flagstaff Cove
Fort Wayne, IN, 46815, United States

Payment Receipt
01/13/2022

Location:	0000 - Home Office	Record No.:	RCV-503
Currency:	USD	Date:	01/13/2022
Customer No.:	1005894	Check No.:	
Customer Name:	Customer - CC	Batch No.:	BATCH-44572.9191393518
Address:	Customer - CC Location United States	Notes:	

Inv No.	Type	Due Date	Inv Total	Discount	Write Off Amount	Convenience Fee	Interest	Payment
SI-1399	Invoice	01/10/2022	100.00	0.00	0.00	0.00	0.00	100.00

100.00 0.00 0.00 0.00 0.00 100.00

Pending Invoices:	0.00
Pending Payments:	102.00
Account Balance After Pending Invoices/Payments	-102.00

Your Receipt - Thank You

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