How to Process Credit Card payments with 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
- Add a Credit Card, please refer to http://help.irelyserver.com/display/DOC/How+to+Add+Credit+Card+to+Customer
 Configure Convenience Fee in System Manager. Please refer to http://help.irelyserver.com/display/DOC
- /How+to+set+up+Credit+Card+Convenience+Fee
- 4. Create an Invoice. Please refer to http://help.irelyserver.com/display/DOC/How+to+Create+Standard+Invoice
- 5. Click the Sales | Activities | Receive Payments. This will open the Receive Payments Search screen.
- 6. Click the **New** button to open a new Receive Payments screen.

| Receive Payments - | | i. | | | | | | | | - | | × |
|----------------------|-----------------|-------------------|---------------------|---------------------------|-----------------|-----------------------|------------------------|-----------------------|--------------|------------|----|------------|
| | Delete Undo | Recalculate Print | | | | | | | | | | |
| Details Post Preview | w Post History | Audit Log Attach | ments | | | | | | | | | |
| Туре | Cash Receipts | ~ | Location | + 0001 - Fort Wayne | | C | Record No | Created On Save | | | | |
| Customer + | | Q | Date Paid | 13/01/2022 | | 1 | Total AR | | | | | 0.00 |
| Payment Method 🔸 | | ~ | Bank Account | 253624539656 | | C | & Forex Rate Type | Spot | | | | ~ |
| Amount Paid | | 0.00 | Check No | | | | Forex Rate | | | | | 1.00 |
| Unapplied Amount | | 0.00 | Currency | • USD | | | Apply on Account | | Apply to Bud | get 🖌 | | |
| Notes | | | Bank Transaction No | | | | EFT Budget | | Thru Date | | | 15 |
| Select Top 100 | 🗌 Clear All 📄 V | iew Invoice X Ren | nove Export • 🔠 Vi | ew - Filter (F3) | | | | | | | | K 7 K 3 |
| Location | Discount Date | Due Date 🔺 Invi | oice Date Days C Ir | woice Scale T Custor Term | s Invoice Total | Discount Availa Disco | ount Taken Write Off A | mou Write Off Account | Interest | Amount Due | Pa | yment |
| | | | | | | | | | | | | |
| 4 | | | | | | | | | | | | |
| | | | | | | | | 0.00 0.00 | 0.00 | 0.00 | | |
| ? 🗘 🖓 6.18s [| Ready | | | | | | | 14 4 Pa | ge 1 | of 1 🕨 🛛 | G | Refres |

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.

- 7. 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.
- 8. Select Credit Card under Payment Method dropdown

| | Post Previe | w Post History Audit Log Attachments | | | | | | | | |
|--------|-------------|--------------------------------------|---------------------|------------|--------|------------------------|-------------------|----------------|---------|------------|
| Туре | | Cash Receipts v Location | • 0001 - Fort Wayne | | Q, | Record No | Created On Save | | | |
| Custon | ner 🔸 | Customer - CC Q, Date Paid | 13/01/2022 | | 12 | Total AR | | | | 100.0 |
| Payme | nt Method 🔸 | Sank Account | 253624539656 | | Q, | Forex Rate Type | | | | |
| Amoun | nt Paid | Payment Method | | | | Forex Rate | | | | 1.0 |
| Unappl | lied Amount | Refund | | • | ~ | Apply on Account | | Apply to Budge | t 🗌 | |
| Notes | | Manual Credit Card | | | | EFT Budget | | Thru Date | | E |
| | | Debit Memos and Payments | | | | | | | | 5.2 |
| M 26 | Location | ACH | | unt Availa | Dirco | unt Takan Write Off An | Write Off Account | Interest | Payment | Amount Due |
| | 0001 - Fort | Write Off | | 0.00 | Discon | 0.00 0. | 00 51515-0000-000 | 0.00 | 0.00 | 100 |
| | | VISA ending in 0006 | | - | | | | | | |
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9. On grid area, select the invoice/s to be paid. Convenience Fee column will be calculated.

| vpe | Cash Receipts | Location | 0001 - Fort Wayne | | 0 | Record No | RCV-502 | | |
|------------------|--------------------------|----------------------------------|---------------------------------------|------------------------|------------------------|--------------------------------------|---------------------------|-----------------|------------------|
| ustomer 1 | Customer - CC | Q, Date Paid | 13/01/2022 | | E | Total AR | | | |
| ayment Method 😽 | VISA ending in 0006 | Bank Account | 253624539656 | | 0 | A Forex Rate Type | | | |
| mount Paid | | 102.00 Check No | | | | Forex Rate | | | |
| Inapplied Amount | | 0.00 Currency | • USD | | | Apply on Account | | Apply to Budget | |
| lotes | | Bank Transaction N | lo | | | EFT Budget | | Thru Date | |
| Select Top 100 | Clear All | X Remove Export • 🔠 V | fiew • Filter (F3) | | | | | | |
| Location | Discount Date Due Date 4 | Invoice Date Days C | nvoice Scale 1 Custor Terms | Invoice Total Discount | Availa Convenience Fee | Discount Taken Write Of | ff Amou Write Off Account | Interest Pa | yment Amount Due |
| 0001 - Fort | 10/01/2022 | 10/01/2022 0 5 | 5I+1 Du | 100.00 | 0.00 2.00 | 0.00 | 0.00 51515-0000-000 | 0.00 | 100.00 0.00 |
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Computation: Invoice Total = 100.00 Credit Card Type Fee = 2%

Convenience Fee = Invoice Total x Credit card Type Fee = $100 \times 0.02 = 2.00$

- 10. 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.

| Receive Payments - 1005894 Customer – CC | | |
|--|-------------------------------|---|
| New - Save Search Delete Undo Recalculate Print Email - Post Credit Ca | | |
| Details Post Preview Post History Audit Log Attachments | | |
| Type Cash Receipts v Location + 00 | 0 Parad Na | RCV-502 |
| Customer + Customer - CC Q Date Paid 13 | | 100.00 |
| Payment Method * VISA ending in 0006 v Bank Account 25 | | v |
| Amount Paid 100.00 Check No | | 1.00 |
| Unapplied Amount 0.00 Currency • US | | Apply to Budget |
| Notes Bank Transaction No | | Thru Date |
| Select Top 100 🗌 Clear All 🖺 View Invoice 🗙 Remove Export • 🔠 View • | Approval | 53 |
| Location Discount Date Due Date A Invoice Date Days C Invoice | rippioval | Off Account Interest Payment Amount Due |
| ✓ 0001 - Fort 10/01/2022 10/01/2022 0 SI-1 | The transaction was approved. | 0000-000 0.00 100.00 0.00 |
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| | ОК | |
| | OK | |
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| ? 🗘 🖓 0.89% [Ready | | Id Id Page 1 of 1 ▷ ▷ ØRefresh |

- 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.

| | iew Post History Audit Log | Attachments | Add - Condit Cond | | | | | | | | |
|-----------------|----------------------------|------------------------------|---------------------------|-------------------------|--------------------|--------------------|---------------------|---------------------------|-------------|---------|------------|
| pe | Cash Receipts | Location | Delete a Credit Card | | | Q, | Record No | RCV-502 | | | |
| ustomer | + Customer - CC | Q, Date Paid | 13/01/2022 | | | | Total AR | | | | |
| syment Method | + VISA ending in 0006 | v Bank Account | 25362453965 | 6 | | ٩ | Forex Rate Type | | | | |
| nount Paid | | 102.00 Check No | | | | | Forex Rate | | | | |
| napplied Amount | | 0.00 Currency | + USD | | | v | Apply on Account | | Apply to Bu | dget 🗌 | |
| otes | | Bank Transac | tion No | | | | EFT Budget | | Thru Date | | |
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ii. Click OK button and Receive Payment will be saved.

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

| | ive Close | | | | | | | | | |
|---|-----------|---------------|---|-------------------------|--|--|---------------------|----------|--|--|
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| | | M M Page | 1 × of 1 | | e e | Pdf v | Attachments | | | |
| <image/> | | in a rage | | P _ P | | 1 di | / tabel in circle | | | |
| | | | iRely LLC | | | | E E E | Payment | Receipt | |
| | | irely | 4242 Flagstaff Cove Fort Wayne, IN, 46815, I | United States | | | | | 01/13/2022 | |
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| Location: 0000 - Home Office Record No:: R/CV-606 Customer Ni:: 105894 Check No:: Discussion: Discussion: Customer Ni:: Customer - OC Discussion: Batch No:: Discussion: Discussion: Address:: Customer - OC Location Notes: Discussion: Notes: Discussion: Notes: Im: No: Type Due Date Im: Votal Discourt Write Off Amount Convenience Fee Interest Payment Si-1378 Invoice 01/13/2022 100:00 0.00 0.00 2.00 0.00 102:00 Monoci 0.00 0.00 0.00 2.00 0.00 102:00 Monoci Pending Invoices: -100:00 -100:00 -200:00 102:00 Monoci Record Record References -100:00 -200:00 102:00 -100:00 Monoci Out 0.00 0.00 2.00 0.00 102:00 Monoci Record Ing Invoices: -100:00 -100:00 -200:00 -200:00 Monoci Out Out <td< td=""><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></td<> | | | | | | | | | | |
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