

# How to Process Credit Card payments with Convenience Fee

**Note:** This feature is only available in 21.2

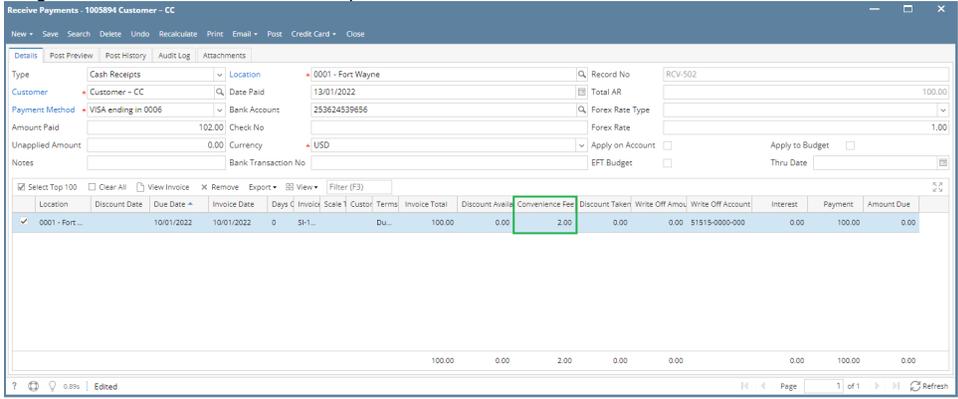
Below are the steps in processing credit card payments without convenience fee

1. Create a new customer. Please refer to <http://help.irelyserver.com/display/DOC/How+to+Add+a+Customer>
2. Add a Credit Card, please refer to <http://help.irelyserver.com/display/DOC/How+to+Add+Credit+Card+to+Customer>
3. 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.

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](#) help you in filling out the fields.
8. Select **Credit Card** under **Payment Method** dropdown

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



Computation:

Invoice Total = 100.00

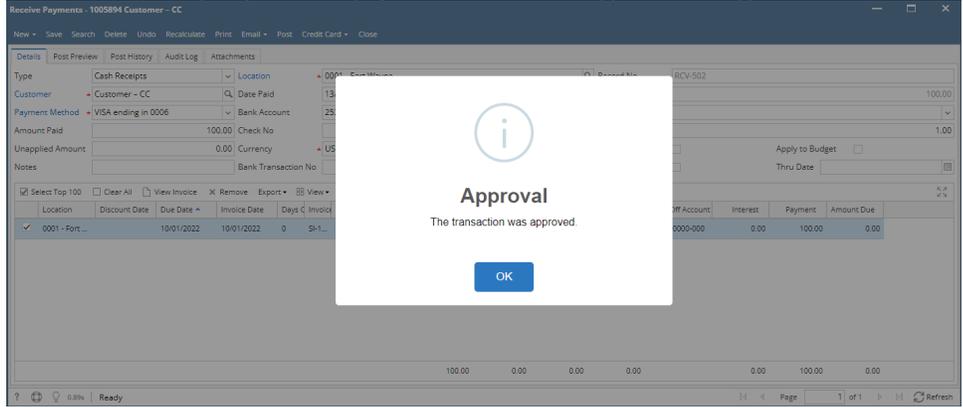
Credit Card Type Fee = 2%

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

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

a. **Post Button**

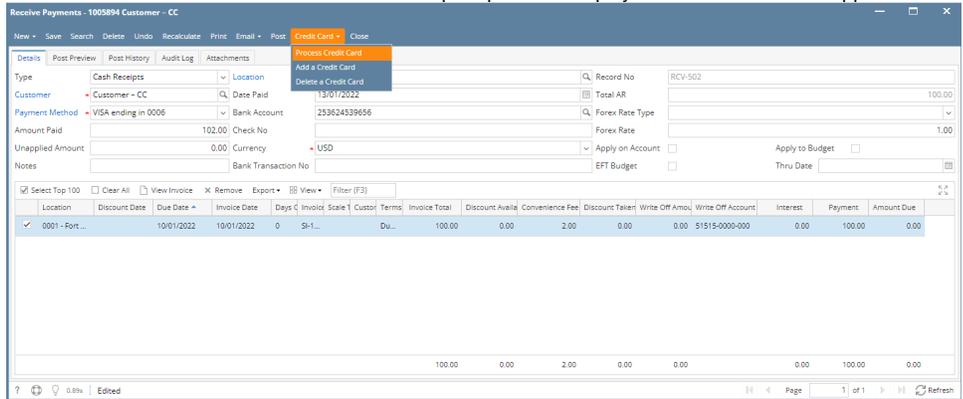
i. Click Post button and prompt will be displayed once transaction is approved or disapproved.



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.



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

11. 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-505
Currency:	USD	Date:	01/13/2022
Customer No.:	1005884	Check No.:	
Customer Name:	Customer - CC	Batch No.:	BATCH-44572.6391655478
Address:	Customer - CC Location United States	Notes:	

Inv No.	Type	Due Date	Inv Total	Discount	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

	100.00	0.00	0.00	2.00	0.00	102.00
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Pending Invoices:	-100.00
Pending Payments:	102.00
<b>Account Balance After Pending Invoices/Payments</b>	<b>-202.00</b>

Your Receipt - Thank You

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