

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.

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: 0001 - Fort Wayne Date Paid: 13/01/2022 Total AR: 0.00

Payment Method: Bank Account Bank Account: 253624539656 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 Budget: ☒ EFT Budget: Thru Date:

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	Invoiced	Scale 1	Custor	Terms	Invoice Total	Discount Availa	Discount Taken	Write Off Amou	Write Off Account	Interest	Amount Due	Payment
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0.00 0.00 0.00 0.00

6.18s Ready Page 1 of 1 Refresh

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

Receive Payments - 1005894 Customer - CC

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: Customer - CC Date Paid: 13/01/2022 Total AR: 100.00

Payment Method: ACH Bank Account: 253624539656 Forex Rate Type: Spot

Amount Paid: 100.00 Check No: Forex Rate: 1.00

Unapplied Amount: 100.00 Currency: USD Apply on Account: Apply to Budget: ☐ EFT Budget: Thru Date:

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	Invoiced	Scale 1	Custor	Terms	Invoice Total	Discount Availa	Discount Taken	Write Off Amou	Write Off Account	Interest	Payment	Amount Due
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100.00 0.00 0.00 0.00 0.00 0.00 100.00

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

Location	Discount Date	Due Date	Invoice Date	Days	Invoice	Scale	Cust	Terms	Invoice Total	Discount Avail	Convenience Fee	Discount Taken	Write Off Amou	Write Off Account	Interest	Payment	Amount Due
0001 - Fort...	10/01/2022	10/01/2022	0	51-1...	Du...				100.00	0.00	2.00	0.00	0.00	51515-0000-000	0.00	100.00	0.00

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



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.:	1005894	Check No.:	
Customer Name:	Customer – CC	Batch No.:	BATCH-44572.9391655478
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
Account Balance After Pending Invoices/Payments	-202.00

Your Receipt - Thank You

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