

# How to Process Credit Card payments without Convenience Fee in Make Payments Screen

**Note:** This feature is only available in 21.2. Enable Portal Access in Customer Contact.

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

The screenshot shows the 'Customer - 1005894 Customer - CC' form in the 'Misc' tab. The 'Credit Details' section includes the following fields and values:

- Credit Limit: 999,999.00
- AR Balance: 0.00
- Credit Stop Days: 999,999
- Credit Limit Reached: (empty)
- Credit Code: Normal
- Active:
- PO Required:
- Credit Hold:
- Exempt from Portal Credit Card Fee:

The 'Budget Details' section includes:

- Budget Begin Date: (empty)
- Monthly Budget: 0.00
- No of Periods: (empty)
- Budget Schedule: (empty)
- Tie Budget to Customer Aging:
- Import Budget Schedule: (empty)

The 'Credit Cards' section includes a table with columns: Type, Credit Card, Expires, Active.

The 'Statement Detail' section includes:

- Statement Detail:
- Statement Credit Limit:
- Statement Format: (empty)
- Service Charge: (empty)
- Last Service Charge: (empty)
- Apply Prepaid Taxes:
- Apply Sales Tax:
- Calc Auto Freight:
- Update Quote: (empty)
- Disc Schedule: (empty)
- Print Invoice: (empty)
- Link Customer No: (empty)
- Referred by Customer: (empty)
- Special Price Group:
- Exclude Dunning Letter:
- Received Signed License:
- Print Price on Pick Ticket:
- Include Name in address:

3. To enable portal access, click **General** tab and click Enable.

The screenshot shows the 'Customer - 1005894 Customer - CC' form in the 'General' tab. The 'Web Portal' section includes the following fields and values:

- Enable:
- Portal Admin: (empty)
- Portal Role: (empty)

The 'Web Portal Approvals' section includes:

- Require Approval For:
- Approver List: (empty)
- Portal Users Only:

The 'Tax Details' section includes:

- Print 1099:
- 1099 Name: (empty)
- 1099 Form: (empty)
- 1099 Type: (empty)
- Federal Tax ID: (empty)
- State Tax ID: (empty)
- W9 Signed: (empty)

4. Select Customer Contact details on Portal Admin field and set your password.

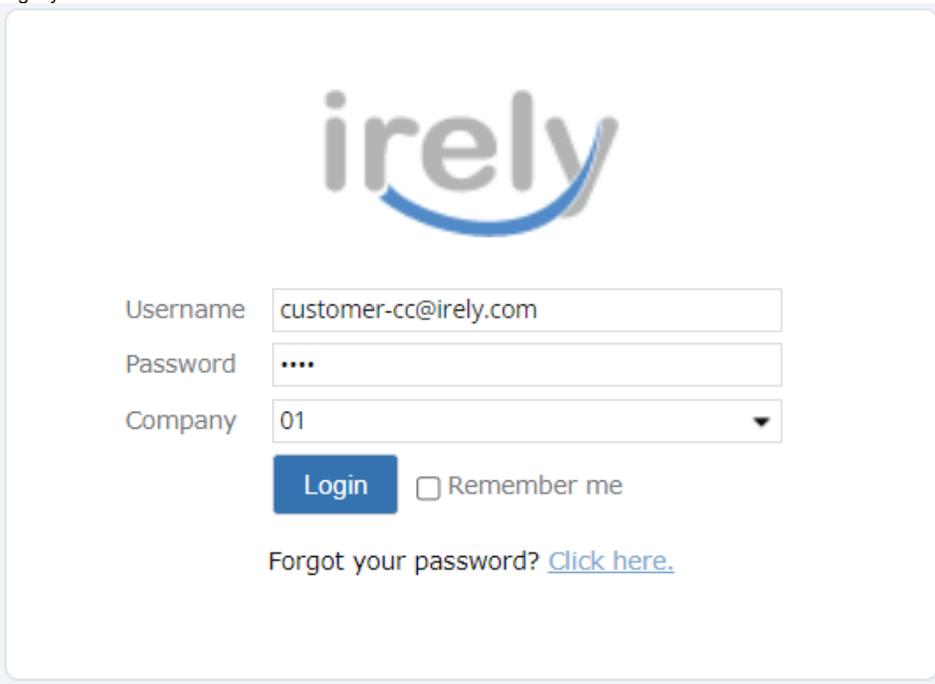
The screenshot shows the 'Customer - 1005188 Customer - CC' form. The 'Web Portal' section is active, with 'Enable' checked and 'Portal Admin' selected in the 'Portal Role' dropdown. A 'Change Password' dialog box is overlaid on the form, with fields for 'New Password' and 'Confirm Password'. The dialog also has 'OK' and 'Cancel' buttons and a 'Ready' status at the bottom.

5. Select Portal Admin on Portal Role

The screenshot shows the 'Customer - 1005188 Customer - CC' form. The 'Web Portal' section is active, with 'Enable' checked and 'Portal Admin' selected in the 'Portal Role' dropdown. The 'Web Portal Approvals' section is also visible, with 'Require Approval For' and 'Approver List' options. The 'Tax Details' section is on the right, with fields for 'Print 1099', '1099 Name', '1099 Form', '1099 Type', 'Federal Tax ID', 'State Tax ID', and 'W9 Signed'.

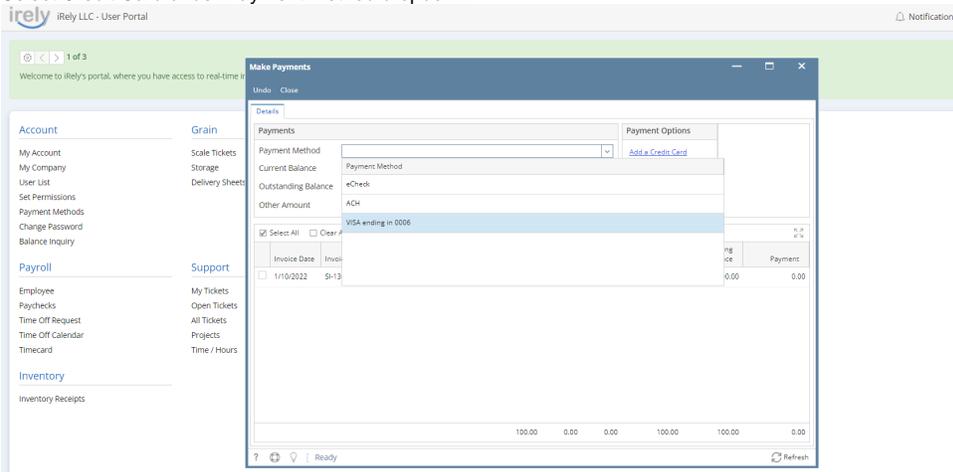
6. Click **Save** button to save the latest changes on newly created Customer
7. Add a Credit Card, please refer to <http://help.irelyserver.com/display/DOC/How+to+Add+Credit+Card+to+Customer>
8. Create an Invoice. Please refer to <http://help.irelyserver.com/display/DOC/How+to+Create+Standard+Invoice>

9. Login your account on Web Portal



The image shows the irely login page. At the top center is the irely logo. Below it are three input fields: 'Username' with the value 'customer-cc@irely.com', 'Password' with four dots, and 'Company' with the value '01'. Below these fields is a blue 'Login' button and a checkbox labeled 'Remember me'. At the bottom, there is a link that says 'Forgot your password? [Click here.](#)'

- 10. Click the **Make a Payment** under Transactions. This will open the Make a Payment screen.
- 11. Select **Credit Card** under Payment Method dropdown



The screenshot shows the irely User Portal interface. The main content area is titled 'Make Payments' and contains a 'Details' section. The 'Payments' section has a 'Payment Method' dropdown menu set to 'Credit Card'. Below this, there are fields for 'Current Balance', 'Outstanding Balance', and 'Other Amount'. A table below shows a list of payments with columns for 'Invoice Date', 'Invoice', 'P/E', 'P/S', and 'Payment'. The table has one row with the following values: '1/10/2022', '9-13', '0.00', '0.00', and '0.00'. The 'Payment' column has a '0.00' value. The table is currently empty except for this one row. The 'Payment' column has a '0.00' value. The table is currently empty except for this one row.

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

The screenshot shows the 'Make Payments' window. The 'Payments' section includes:

- Payment Method: VISA ending in 0006
- Current Balance: 100.00 (with a 'Pay' button)
- Outstanding Balance: 100.00 (with a 'Pay' button)
- Other Amount: 0.00 (with a 'Pay' button)
- Selected Amount: 100.00
- Total Payment: 100.00

The 'Payment Options' section includes links for 'Add a Credit Card' and 'Delete a Credit Card', and a 'Process Payment' button.

Below the summary is a table with 11 columns: Invoice Date, Invoice No., Due Date, Terms, Invoice Total, Discount, Convenience Fee, Interest, Current Balance, and Outstanding Balance. A single record is shown with a checked selection box:

Invoice Date	Invoice No.	Due Date	Terms	Invoice Total	Discount	Convenience Fee	Interest	Current Balance	Outstanding Balance
1/10/2022	SI-1369	1/10/2022	Due on Rec...	100.00	0.00	0.00	0.00	0.00	0.00

13. Click **Process Payment**. Once successful it will show an approval notification.

The screenshot shows the 'Make Payments' window with an 'Approval' dialog box overlaid in the center. The dialog box contains:

- An information icon (i in a circle).
- The word 'Approval' in bold.
- The text 'The transaction was approved.'
- An 'OK' button.

The background window is dimmed, showing the same payment summary and table as in the previous screenshot.

14. Click **OK** button. This will display Report Viewer - Receipt Payment screen. Convenience Fee column is added in the grid.

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

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

Inv No.	Type	Due Date	Inv Total	Discount	Write Off Amount	Convenience Fee	Interest	Payment
SI-1369	Invoice	01/10/2022	100.00	0.00	0.00	0.00	0.00	100.00

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

Your Receipt - Thank You

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Ready Refresh