

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

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 X Remove Export View Filter (F3)

Type	Credit Card	Expires	Active
			<input checked="" type="checkbox"/>

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

Web Portal

Enable ☒ Portal Admin Portal Role

Web Portal Approvals

+ Insert X Delete Export View Filter (F3)

Require Approval For ☒ Approver List Portal Users Only

Tax Details

Print 1099 ☒

1099 Name

1099 Form

1099 Type

Federal Tax ID

State Tax ID

W9 Signed

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

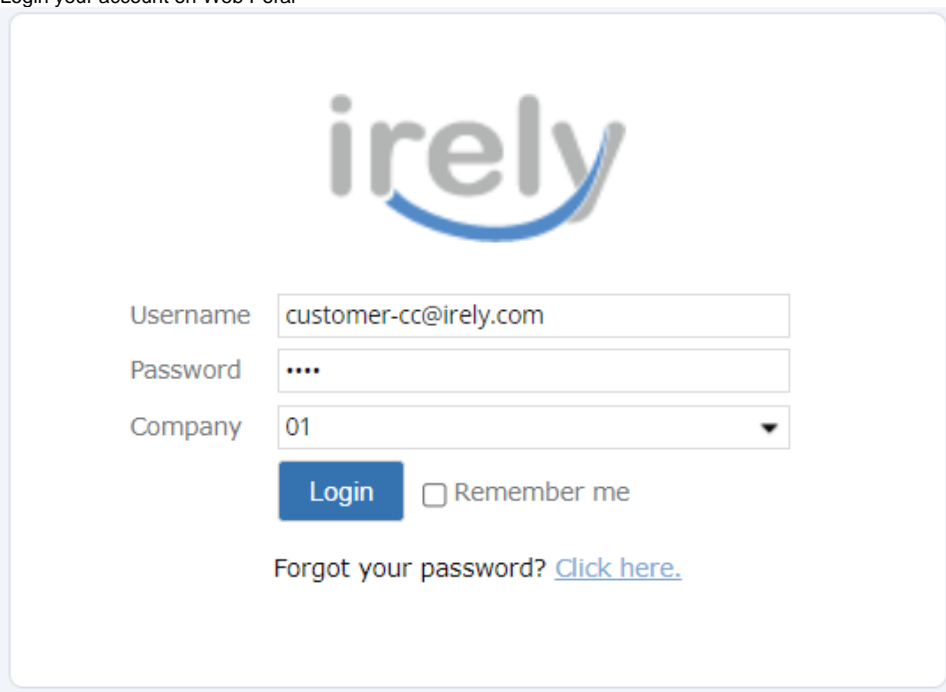
The screenshot shows the 'Customer - 1005188 Customer - CC' form. The 'Web Portal' section has 'Enable' checked, 'Portal Admin' set to 'Customer - CC Co', and 'Portal Role' set to 'Portal Role'. The 'Web Portal Approvals' section has 'Require Approval For' checked and 'Approver List' set to 'Portal Users Only'. A 'Change Password' dialog box is open in the center, with fields for 'New Password' and 'Confirm Password'. The dialog box has 'OK' and 'Cancel' buttons. The background form is partially obscured by the dialog box.

5. Select Portal Admin on Portal Role

The screenshot shows the 'Customer - 1005188 Customer - CC' form. The 'Web Portal' section has 'Enable' checked, 'Portal Admin' set to 'Customer - CC Co', and 'Portal Role' set to 'Portal Admin'. The 'Web Portal Approvals' section has 'Require Approval For' checked and 'Approver List' set to 'Portal Users Only'. The 'Tax Details' section has 'Print 1099' checked, '1099 Name' set to '1099 Name', '1099 Form' set to '1099 Form', '1099 Type' set to '1099 Type', 'Federal Tax ID' set to 'Federal Tax ID', 'State Tax ID' set to 'State Tax ID', and 'W9 Signed' set to 'W9 Signed'. The 'Portal Role' dropdown is open, showing 'Portal Admin' selected.

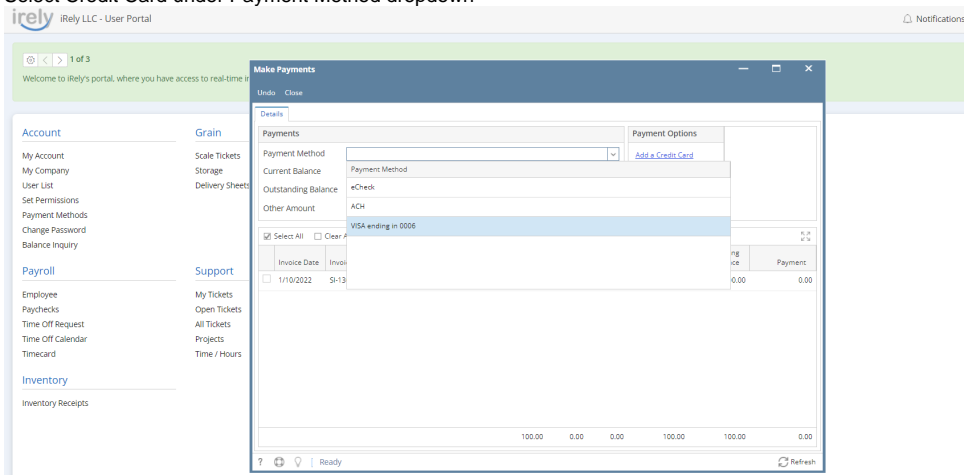
6. Click **Save** button to save the latest changes on newly created Customer
7. Add a Credit Card, please refer to <http://help.irelyserver.com/display/DOC/How+to+Add+Credit+Card+to+Customer>
8. Create an Invoice. Please refer to <http://help.irelyserver.com/display/DOC/How+to+Create+Standard+Invoice>

9. Login your account on Web Portal



The image shows the login page for the irely web portal. At the top 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 a dropdown menu showing '01'. There is a blue 'Login' button and a checkbox for 'Remember me'. Below the login fields 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 image shows the irely User Portal interface. The top bar includes the irely logo, 'irely LLC - User Portal', and a 'Notifications' icon. The main content area has a left sidebar with navigation links under 'Account', 'Payroll', and 'Inventory'. The 'Account' section is expanded, showing links like 'My Account', 'My Company', 'User Info', 'Set Permissions', 'Payment Methods', 'Change Password', and 'Balance Inquiry'. The 'Payment Methods' link is highlighted. A 'Make Payments' window is open in the foreground. It has a 'Details' tab and a 'Payments' section. The 'Payment Method' dropdown is set to 'Credit Card'. The 'Current Balance' is \$100.00. The 'Outstanding Balance' is \$0.00. The 'Other Amount' is \$0.00. The 'Payment Method' dropdown is open, showing options: 'Credit Card', 'eCheck', 'ACH', and 'VISA ending in 0006'. The 'Payment Method' dropdown is set to 'Credit Card'. The 'Payment' button is visible. The window also shows a table with columns for 'Invoice Date', 'Invoice', 'Payment', and 'Payment'.

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

Make Payments

UndoClose

Details

Payments

Payment MethodVISA ending in 0006

Current Balance100.00PaySelected Amount100.00

Outstanding Balance100.00PayTotal Payment100.00

Other Amount0.00Pay

Payment Options

Add a Credit Card

Delete a Credit Card

Process Payment

☒ Select All☐ Clear All

View Invoice

Export

View

Filter (F3)

1 records

	Invoice Date	Invoice No.	Due Date	Terms	Invoice Total	Discount	Convenience Fee	Interest	Current Balance	Outstanding Balance
<input checked="" type="checkbox"/>	1/10/2022	SI-1369	1/10/2022	Due on Rec...	100.00	0.00	0.00	0.00	0.00	0.00

ReadyRefresh

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

Make Payments

UndoClose

Details

Payments

Payment MethodVISA ending in 0006

Current Balance

Outstanding Balance

Other Amount

Payment Options

Add a Credit Card

☒ Select All☐ Clear All

View Invoice

Export

View

Filter (F3)

1 records

	Invoice Date	Invoice No.	Due Date	Terms	Invoice Total	Discount	Convenience Fee	Interest	Current Balance	Outstanding Balance
<input checked="" type="checkbox"/>	1/10/2022	SI-1369							0.00	0.00

ReadyRefresh

i

Approval

The transaction was approved.

OK

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-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-1359	Invoice	01/10/2022	100.00	0.00	0.00	0.00	0.00	100.00

Total	100.00	0.00	0.00	0.00	0.00	100.00
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Pending Invoices:	0.00
Pending Payments:	102.00
Account Balance After Pending Invoices/Payments	-102.00

Your Receipt - Thank You

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