## How to Pay Invoice using credit card in Receive Payments

## Notes:

- In 17.3 Version, Receive Payment Details Screen is now Receive Payments and Receive Payments Screen is now Receive Multiple Payments.
- In 21.2, Convenience Fee is added as a feature when paying via credit cards. You may refer to the links at the last section of this page for guides
  on setting up convenience fees.

Below are the steps in paying invoices using credit card in receive payments screen:

- 1. Click the Sales menu and Click Receive Payments. This will open the Receive Payments Search screen.
- 2. Click the New button to open a new Receive Payments screen. Details Post Preview Post History Audit Log (0) Q Bank Account Q, Date Paid Record No 12/13/2017 Created On Save 0001 - Fort Wayne Q Total AR Location Check No Payment Method + Apply on Account Apply to Budget Amount Paid 0.00000 Currency + USD Unapplied Amount 0.00000 Notes ☑ Select All ☐ Clear All Q, View Invoice X Remove Report 88 View Filter (F3) Location Discount Date Due Date Invoice Scale Custor Terms Invoice Total Discount Availa Discounts Take Interest Amount Due Payme € • 0.00 0.00 0.00 ? 🔘 🖓 🖂 Ready Page 1 of 1

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.

 Fill out the Customer No, Location, Currency, and Payment Method fields. These are the required details on this screen. Notice that upon selecting the customer, the grid area will show all the posted and unpaid Invoices, Credit Memos, Prepayments, Overpayments that belongs to the selected customer. Refer to Receive Payments | Field Description | Header Details to help you in filling out the fields.
 a. Select Credit Card under Payment Method dropdown

	ew Post History	Audit Log (0)			1				-1	_		
stomer •	ABC Trucking			٩	Date Paid	12)	18/2017	1	Record No	Create	d On Save	
cation	0001 - Fort Way	ne		9	Bank Accou	nt 111	11	c	A Total AR			1,589.6
yment Method 🔸	VISA ending in 0	1006		~	Check No				Apply on Account		Apply to Budge	
nount Paid				0.00000	Currency	+ US	D		/			
applied Amount				0.00000	Notes							
Z Select All 🗌 C	lear All 🔍 View I	Invoice X Rer	nove Report	88 View	Filter (F3)							
Location	Discount Date	Due Date	Invoice No.	Scale Ticket I	Customer Re	Terms	Invoice Total	Discount Availa	Discounts Take Ir	nterest	Amount Due	Paym
0001 - Fort		1/2/2018	SI-402			Net 15	33.60	0.00	0.00	0.00000	33.60	0.
0001 - Fort		12/28/2017	SI-400			Net 15	80.40	0.00	0.00	0.00000	80.40	0.
0001 - Fort		12/28/2017	SI-399			Net 15	1,446.73	0.00	0.00	0.00000	1,446.73	0.)
0001 - Fort		12/7/2017	SI-398			Net 15	13.50	0.00	0.00	0.00000	13.50	0.0
0001 - Fort		12/7/2017	SI-397			Net 15	6.75	0.00	0.00	0.00000	6.75	0.0
		9/12/2017	SI-347	432		Net 15	8.64	0.00	0.00	0.00000	8.64	0.1
0001 - Fort												
0001 - Fort												

- On grid area, look for the invoice/s to be paid and enter the necessary details. Refer to Receive Payments | Field Description | Grid Details to help you in filling out the fields.
  - a. Manually override the Discount or Interest amount if necessary.

b. Enter a full payment for the a grid row by double clicking the **Payment** field or manually entering the amount or checking the checkbox on the leftmost side of the row. You can also enter a partial payment by manually typing the amount in the **Payment** field.

Detail	s Post Previ	ew Post History	Audit Log (0)												
Custor	mer 🔸	* ABC Trucking				Date Paid	12/18/2017			Record No	Created	Created On Save			
Locati	on	0001 - Fort Wayne				Bank Account	1111		Q,	Total AR			1,589.62000		
Payment Method + VISA ending in 0006					Check No				Apply on Accoun	t 🗌	Apply to Budge	s 🗌			
Amount Paid 0.0000					Currency	+ USD		~							
Unapp	lied Amount				0.0000	Notes									
⊠ Se	elect All 🗌 C	lear All Q, View I	Invoice × Rem	ove Report	t 🗄 View 🕴	ilter (F3)							53		
	Location	Discount Date	Due Date	Invoice No.	Scale Ticket Nos.	Customer Referen	nces Terms	Invoice Total	Discount Availa	Discounts Take	Interest	Amount Due	Payment		
	0001 - Fort		1/2/2018	51-402			Net 15	33.60	0.00	0.00	0.00000	33.60	0.00000		
	0001 - Fort		12/28/2017	51-400			Net 15	80.40	0.00	0.00	0.00000	0.00	80.40000		
	0001 - Fort		12/28/2017	SI-399			Net 15	1,446.73	0.00	0.00	0.00000	1,446.73	0.00000		
	0001 - Fort		12/7/2017	51-398			Net 15	13.50	0.00	0.00	0.00000	13.50	0.00000		
	0001 - Fort		12/7/2017	SI-397			Net 15	6.75	0.00	0.00	0.00000	6.75	0.00000		
	0001 - Fort		9/12/2017	51-347	432		Net 15	8.64	0.00	0.00	0.00000	8.64	0.00000		
								1,589.62	0.00	0.00	0.00	1,509.22	80.40		
? 0		Edited								1	4 - P	age 1	of1 🕨 🕅		

5. Enter in the Amount Paid field the total amount you received from your customer. You can either manually type in the amount, or double click in the field to automatically enter the total of the payments in the grid.

Receive Payments - ABC Trucking					^ □ ×
New + Save Search Delete Undo Print Post Credit Card + Close					
Details Post Preview Post History Audit Log (0)					
Customer * ABC Trucking	Q Date Paid	12/18/2017	Record No	Created On Save	
Location 0001 - Fort Wayne	Q Bank Account	1111	Total AR		1,589.62000
Payment Method * VISA ending in 0006	<ul> <li>Check No</li> </ul>		Apply on Account	Apply to Budget	
Amount Paid 80.40	000 Currency	* USD ~			
Unapplied Amount 0.00	000 Notes				

- 6. 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.

		ABC Trucking											~ □ >
New •	Save Searc	h Delete Und	o Print Post	Credit Car	d • Close								
Detai	s Post Previe	w Post History	Audit Log (0)										
Custo	mer 🔺	ABC Trucking				Q Date Paid	12/18/2017		💷 Re	cord No	RCV-91		
Locati	on	0001 - Fort Way	me							AR			
Paym	ent Method 🔺	VISA ending in 0	0006				$\frown$			y on Account		Apply to Budg	et 🗌
Amou	nt Paid						(:)						
Unap	olied Amount												
⊮ S	elect All 🗌 Cl	ear All 🔍 View	Invoice X Re	move Re									K M K M
	Location	Discount Date	Due Date	Invoice		: -				ints Take	Interest	Amount Due	Payment
	0001 - Fort		1/2/2018	SI-402		IF	kely 121			0.00	0.00000	33.60	0.00000
	0001 - Fort		12/28/2017	51-400		The trans	action was ap	proved.		0.00	0.00000	0.00	80.40000
	0001 - Fort		12/28/2017	51-399						0.00	0.00000	1,446.73	0.00000
	0001 - Fort		12/7/2017	SI-398			ОК			0.00	0.00000	13.50	0.00000
	0001 - Fort		12/7/2017	SI-397						0.00	0.00000	6.75	0.00000
	0001 - Fort		9/12/2017	SI-347	432		Net 15	8.64	0.00	0.00	0.00000	8.64	0.00000
								1,589.62	0.00	0.00	0.00	1,509.22	80.40
? 🤅		Saved								ŀ	(   4   P	age 1	of 1 🕨 🕅

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.

Deta	ils Post Previe	Post History	Audit Log (0)	Add a Credit Car	ard rd					D 14	0.0100		
Locat	ion •	ABC Trucking		Delete a Credit	Card	Date Paid     Date Paid     Date Paid	1111		0	Total AP	RCV-92		1 500 22000
Paum	ent Method	VISA ending in 0	005			Check No.			~	Apply on Account		Apply to Budge	1,309.22000
Amo	int Paid	visk ending in o	000		1 446 730	00 Currency	+ USD		×	http://onrecount		hppi) to buoget	
Unap	plied Amount				0.000	00 Notes							
25	elect All 🗌 C	ear All Q, View I	nvoice X Ren	nove Report	BB View	Filter (F3)							К.Я. К.У.
	Location	Discount Date	Due Date	Invoice No.	Scale Ticket	No Customer Refe	Terms	Invoice Total	Discount Availa	Discounts Take	Interest	Amount Due	Payment
	0001 - Fort		1/2/2018	SI-402			Net 15	33.60	0.00	0.00	0.00000	33.60	0.00000
~	0001 - Fort		12/28/2017	SI-399			Net 15	1,446.73	0.00	0.00	0.00000	0.00	1,446.73000
	0001 - Fort		12/7/2017	SI-398			Net 15	13.50	0.00	0.00	0.00000	13.50	0.00000
	0001 - Fort		12/7/2017	SI-397			Net 15	6.75	0.00	0.00	0.00000	6.75	0.00000
	0001 - Fort		9/12/2017	SI-347	432		Net 15	8.64	0.00	0.00	0.00000	8.64	0.00000
								1	509.22	0.00 0	00	0.00	62.49 1

- ii. Click Ok button and Receive Payment will be saved.iii. Click Post button to post Receive Payment

## Pages:

- How to set up Credit Card Processing
  Notes on Credit Card Convenience Fee setup
  How to set up Credit Card Convenience Fee
  How to Add and Remove Credit Card Details via the Receive Payments Screen
  How to Process Credit Card payments without Convenience Fee
  How to Process Credit Card payments with Convenience Fee