

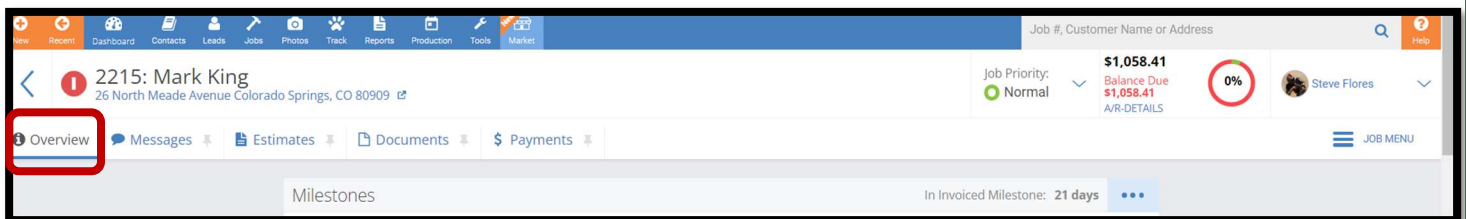
# Up - Taking Credit Card Payments

**Credit Card Fee – 4 – 7%** [However, always ask the Manager before quoting ANYONE! Due to special circumstances.

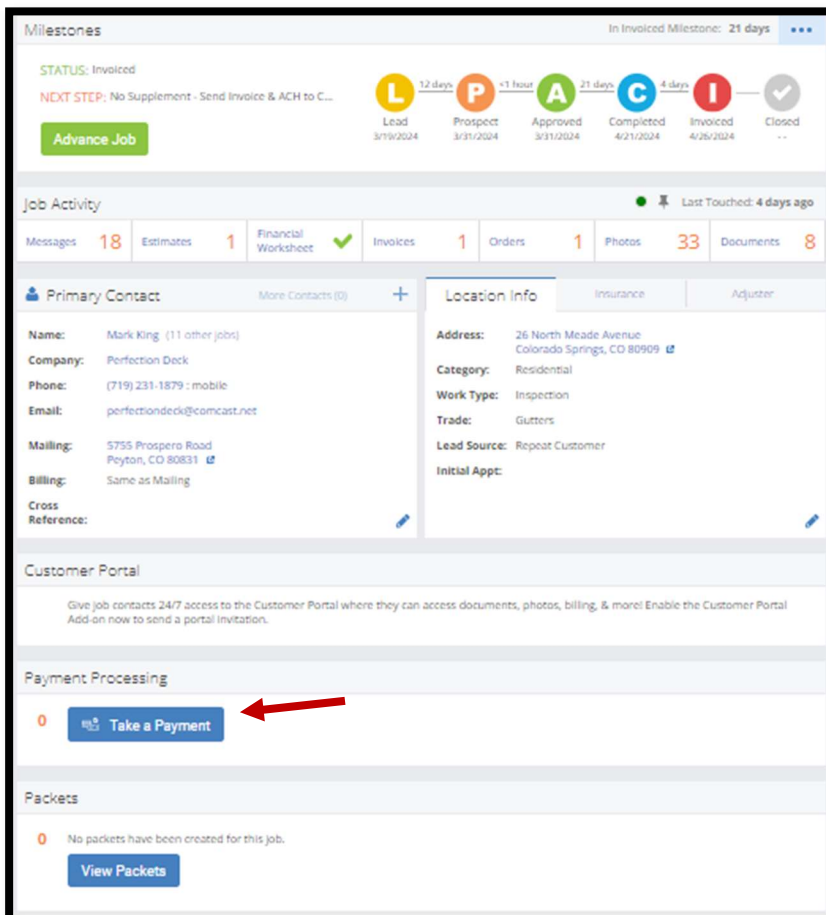
- Add total x 7%
- Customers may split payments as long as they pay the 4% on the balance to be used with the credit card.
- Add credit card dollar amount x .07

## How to take a credit card payment

Click Overview



Scroll down and click on **Take a Payment**



Click **Credit Card or ACH/eCheck** first to open up the options boxes

- Then add the **Payment Amount x 7%** to be used on a credit card [ask for the correct amount first]
- Tick on both **Visa and ACH bubbles** to make a split payment
- Tick **Email a Payment Request** bubble
- And finally, **Select Recipients** button

The screenshot shows the 'Request a Payment' form. At the top, it says '2215: Mark King' with a 'Required' asterisk. Below this, the 'Payment Amount' is set to '\$ 6,078.00' (indicated by a red arrow). To the right, it shows 'Balance Due: \$1,058.41'. The 'Payment Description' is 'Deposit', with an example: 'Down Payment, Last Payment, etc...'. Under 'Payable by: Credit Card or ACH/eCheck', the 'VISA' and 'ACH eCheck' options are selected (indicated by red arrows). Below this, the 'Enter payment now or request payment via email?' section has the 'Email a Payment Request' option selected (indicated by a red arrow). At the bottom right, the 'Select Recipients' button is highlighted with a red arrow. A 'Cancel' button is at the bottom left.

Click the **recipient box** and select the correct **customer's name**, then **add a message**  
Attach an invoice from the **Attachments**, and **Send Email**

The screenshot shows the 'Select Recipients' form. The 'Send To' field has 'King, Mark' selected (indicated by a red arrow). The 'Subject' is 'Payment Request from UpFront Restoration & Roofing'. The 'Message' body contains 'Hello You,' (indicated by a red arrow). Below the message body, the 'Attachments' link is highlighted with a red arrow. At the bottom right, the 'Send Email' button is highlighted with a red arrow. A 'Cancel' button is at the bottom left.