

State / Province / Region Setup

Last Modified on 07/24/2025 11:38 am PDT

Pathway: Setup > System > State / Province /Region

The State / Province / Region Setup screen allows for the configuration of a maximum credit card processing fee (%) by location. Settings in Account Class Setup determine whether a fee is applied and whether it's a fixed amount or percentage. At the account level, individual accounts can be excluded from credit card processing fees entirely, regardless of the account class settings. All applied fees will be capped based on the maximum defined for the corresponding state, province, or region.



Setting the Max Credit Card Processing Fee to '0' **effectively caps max processing at 0%** for that state, province or region. To disable the fee for a specific state, province, or region, **leave the field blank**.

STATE / PROVINCE / REGION SETUP			SETUP > SYSTEM > STATE / PROVINCE / REGION
			<input type="text" value="Search"/>
STATE	NAME	COUNTRY ↓	MAX CREDIT CARD PROCESSING FEE (%)
AK	Alaska		4%
AL	Alabama		4%
AR	Arkansas		4%
AS	American Samoa		
AZ	Arizona		4%
CA	California		4%
CO	Colorado		4%
CT	Connecticut		
DC	District of Columbia		




Permission

The following permission is required to add or edit a max credit card processing fee:

Permission ID	Permission Name
120	Setup \ System and Security

Add/Remove Maximum Fee

To set or update a maximum fee, enter a value in the Max Credit Card Processing Fee (%) field. To remove or disable the fee, clear the field and leave it blank.

STATE / PROVINCE / REGION SETUP			SETUP > SYSTEM > STATE / PROVINCE / REGION
			 <input type="text" value="Search"/>  
STATE ↑	NAME	COUNTRY	MAX CREDIT CARD PROCESSING FEE (%)
AB	Alberta	Canada	
AK	Alaska		4%
AL	Alabama		4%
AR	Arkansas		4%
AS	American Samoa		
AZ	Arizona		4%
BC	British Columbia	Canada	
CA	California		4%
CO	Colorado		4%
CT	Connecticut		
DC	District of Columbia		
DE	Delaware		
FL	Florida		
FM	Federated States of Micronesia		
GA	Georgia		

Account Class

Pathway: Setup > Account > Account Class

In the **Payment Processing** tab of Add/Update Account Class, users can configure a credit card processing fee as a fixed amount or percentage at the account class level. If defined, the fee will be capped by the maximum set for the corresponding state, province, or region.

UPDATE ACCOUNT CLASS	
Details	Customer Portal
Payment Processing	Status Management
Finance Charges and Other Fees	
ENABLE CUSTOMER PORTAL PAY PROCESSING FEE	<input checked="" type="checkbox"/>
ENABLE MANUAL PAY PROCESSING FEE	<input checked="" type="checkbox"/>
ENABLE AUTO PAY PROCESSING FEE	<input checked="" type="checkbox"/>
ENABLE ORDER PAY PROCESSING FEE	<input checked="" type="checkbox"/>
DISABLE ACCOUNT WALLET	No
CREDIT CARD PROCESSING FEE TYPE	Amount
CREDIT CARD FEE AMOUNT	5
CREDIT CARD PROCESSING FEE CHARGE CODE	Credit Card Fee
ACH PROCESSING FEE TYPE	%

Edit Account

Pathway: Customer Service Screen (Accounts) > [right-click] Account Details

At the account level, you can exclude individual accounts from credit card payment processing fees entirely by checking the **"Exclude from Payment Processing Fee"** check box in Edit Account.

EDIT ACCOUNT

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✕

Account

Settings

Billing

BILL GROUP

QA Billing Cycle

▼

Advance - Monthly

Billed Thru Date Jul 31, 2025

Next Invoice Date May 01, 2025

BATCH-25918 (not started)

INVOICE BY EMAIL

No

▼

TERM

Net 20

▼

CREDIT LIMIT

500

▲▼

PAPER BILL FEE - COMMERCIAL

\$ 7.00

BILL BY SITE

☐

AUTO STATUS UPDATE

☒

APPLY FINANCE CHARGES

☒

EXCLUDE FROM PAYMENT PROCESSING FEE

☐

EXCLUDE FROM PAST DUE NOTIFICATION

☐

HIDE WORK ORDER FORMAT RATE

☒

INBOUND ORDER AUTO PRINT

☐

AP

DEFAULT PAYMENT METHOD

ACH

▼

PAYEE NAME

1099

☐

INSTRUCTIONS

WARNING ON OPEN