

# Apply Convenience Fee

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The **Convenience Fee** feature allows businesses to add an optional fee to **manual payments**. This can help cover processing costs for payments made in person or over the phone. Convenience fees are set up at the **Account Class** level, so you can apply different rules for different types of accounts.

**UPDATE ACCOUNT CLASS**

Details | Customer Portal | **Payment Processing** | Status Management | Finance Charges and Other Fees

ENABLE CUSTOMER PORTAL PAY PROCESSING FEE ☒

ENABLE MANUAL PAY PROCESSING FEE ☒

ENABLE AUTO PAY PROCESSING FEE ☐

ENABLE ORDER PAY PROCESSING FEE ☐

DISABLE ACCOUNT WALLET No

CREDIT CARD PROCESSING FEE TYPE %

CREDIT CARD FEE AMOUNT 5

CREDIT CARD PROCESSING FEE CHARGE CODE Credit Card Fee

ECHECK PROCESSING FEE TYPE Amount

ECHECK FEE AMOUNT 10

ECHECK PROCESSING FEE CHARGE CODE ACH Fee

**MANUAL PAY CONVENIENCE FEE TYPE %**

**MANUAL PAY CONVENIENCE FEE AMOUNT 10**

**MANUAL PAY CONVENIENCE FEE CHARGE CODE Convenience Fee**

AUTO PAY DECLINED FEE CHARGE CODE

AUTO PAY DECLINED FEE AMOUNT 10.00

BILLING AUTO PAY AMOUNT Invoice Amount

**POST A PAYMENT**

**BALANCE DUE \$ 1,836.56**

INVOICE	DATE	DUE DATE	AMOUNT	BALANCE	PAY AMOUNT	APPLY
948702	01/12/26	01/22/26	\$ 1,836.56	\$ 1,836.56		<input type="checkbox"/>

Invoice Subtotal \$ 1,836.56 \$ 0.00

Prepayment Amount \$ 1,836.56

APPLY CREDIT CARD FEE ☒ \$ 73.46

**APPLY CONVENIENCE FEE ☒ \$ 183.66**

Total \$ 1,836.56 \$ 2,093.68

PAYMENT METHOD New Credit Card

NAME ON CARD

CARD NUMBER

MONTH YEAR

POSTAL CODE CVV

☐ Save to Wallet

## Permissions

The following permissions should be reviewed to set up and apply Convenience Fees:

Permission ID	Permission Name	Description
23	Setup \ Account	Required to access the account class for setup.
425	Allow Excluding Processing Fee / Convenience Fee on Manual Payments	Allows the user who is processing the payment to remove the processing fee from the payment.

## Prerequisites

1. Create a charge code that can be used for payment processing in [Charge Code Setup](#).
2. Make the charge code available to the regions it applies to in [Available Charge Code Setup](#).

## Convenience Fee Setup

Open the **Account Class** the convenience fee applies to and navigate to the **Payment Processing** tab. In there, review the following settings to match your convenience fee requirements.

- **Manual Pay Convenience Fee Type**
  - This can be set to None, Percentage, or Flat Amount.
  - Leave this set to **None** and convenience fees will be disabled.
- **Manual Pay Convenience Fee Amount**
  - Text entry field to enter the amount associated with the selected fee type.

- **Manual Pay Convenience Fee Charge Code**

- The specific charge code the convenience fee is billed under.

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 type="checkbox"/>
ENABLE ORDER PAY PROCESSING FEE	<input type="checkbox"/>
DISABLE ACCOUNT WALLET	No
CREDIT CARD PROCESSING FEE TYPE	%
CREDIT CARD FEE AMOUNT	5
CREDIT CARD PROCESSING FEE CHARGE CODE	Credit Card Fee
ECHECK PROCESSING FEE TYPE	Amount
ECHECK FEE AMOUNT	10
ECHECK PROCESSING FEE CHARGE CODE	ACH Fee
MANUAL PAY CONVENIENCE FEE TYPE	%
MANUAL PAY CONVENIENCE FEE AMOUNT	10
MANUAL PAY CONVENIENCE FEE CHARGE CODE	Convenience Fee
AUTO PAY DECLINED FEE CHARGE CODE	Declined Payment
AUTO PAY DECLINED FEE AMOUNT	10.00
BILLING AUTO PAY AMOUNT	Invoice Amount

## Apply a Convenience Fee

Once setup is complete, the process to apply the convenience fee is simple and is only available in **AR History** when manually posting a payment.

AR HISTORY

CURRENT	1-30 DAYS	31-60 DAYS	61-90 DAYS	91-120 DAYS	120+ DAYS	TOTAL
0.00	1,836.56	0.00	0.00	0.00	0.00	1,836.56

☒ Limit to open items
 STATEMENT
 INVOICE
 AUTO APPLY
 BALANCE WRITE OFF
 WALLET (0)
 Search

DATE	DUE DATE	PERIOD	SITE ID	TYPE	REFERENCE NO	AMOUNT	APPLIED AMOUNT	BALANCE
01/12/26	01/22/26	2026-01		Invoice	948702	1,836.56		1,836.56

POST A PAYMENT

☒ BALANCE DUE \$ 1,836.56

INVOICE	DATE	DUE DATE	AMOUNT	BALANCE	PAY AMOUNT	APPLY
948702	01/12/26	01/22/26	\$ 1,836.56	\$ 1,836.56	\$ 1,836.56	<input checked="" type="checkbox"/>

Invoice Subtotal \$ 1,836.56  
 Prepayment Amount  
 APPLY CREDIT CARD FEE ☐ \$ 0.00  
 APPLY CONVENIENCE FEE ☒ \$ 183.66  
 Total \$ 1,836.56 \$ 2,020.22

PAYMENT METHOD New Credit Card  
 NAME ON ACCOUNT  
 CARD NUMBER  
 MONTH YEAR  
 POSTAL CODE CVV  
☐ Save to Wallet  
 NOTE

POST PAYMENT

## Apply a Convenience Fee to a Payment

1. Select the **Post Payment** icon in **AR History** to open the **Post a Payment** screen.
2. Review the invoices and select the **Apply** check box for each invoice the payment will cover.
3. By default, the **Apply Convenience Fee** check box is selected. Clear the check box if the convenience fee should not apply to the transaction.
4. Select the **Payment Method** the customer is using. Once selected, the convenience fee is calculated.
  - The convenience fee is calculated based on values entered in the **Invoice Subtotal** and **Prepayment Amount** fields.
  - The convenience fee does not include the **Credit Card Fee**, if one is included in the transaction.