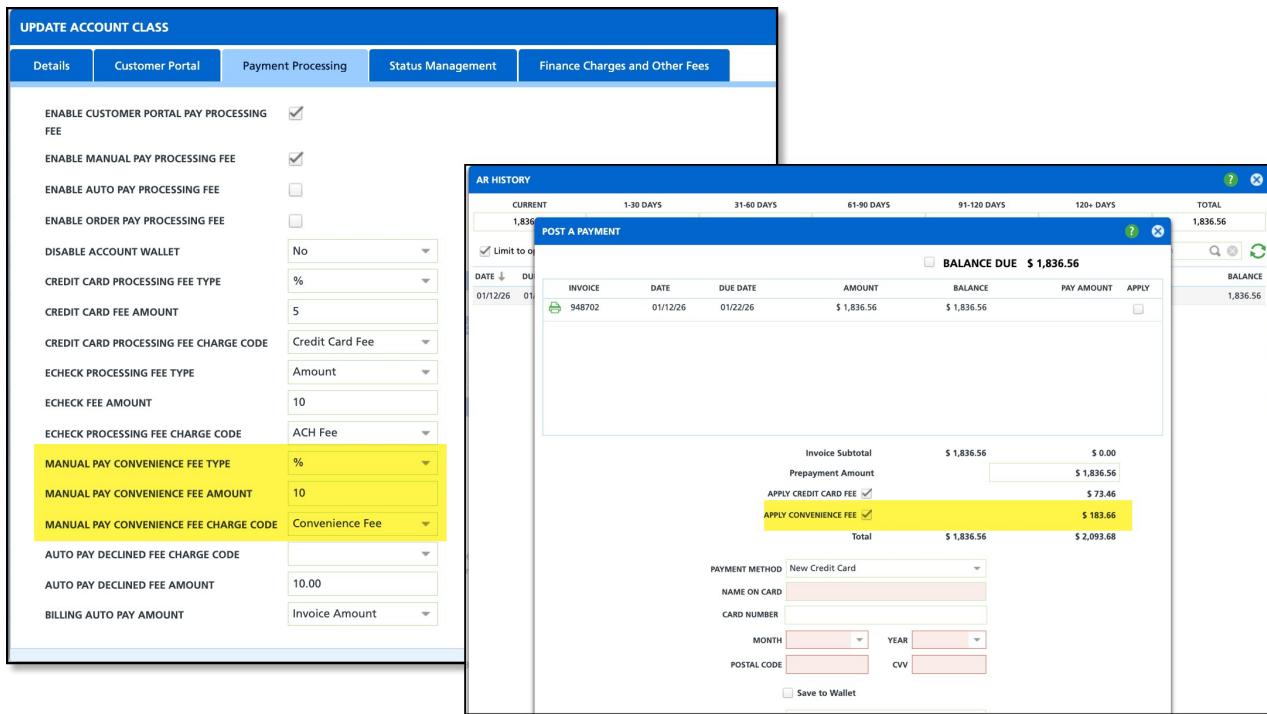


Apply Convenience Fee

Last Modified on 01/30/2026 2:13 pm PST

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.



The left screenshot shows the 'UPDATE ACCOUNT CLASS' screen with the 'Payment Processing' tab selected. It displays various configuration options for different payment types and processing fees. The right screenshot shows the 'AR HISTORY' screen with the 'POST A PAYMENT' interface. It shows an invoice with a balance due of \$1,836.56. The payment screen includes fields for invoice, date, due date, amount, balance, and pay amount. It also shows the breakdown of the payment, including the invoice subtotal (\$1,836.56), a \$73.46 repayment amount, and a \$183.66 convenience fee, resulting in a total payment of \$2,093.68. The payment method is set to 'New Credit Card'.

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 [InCharge 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.

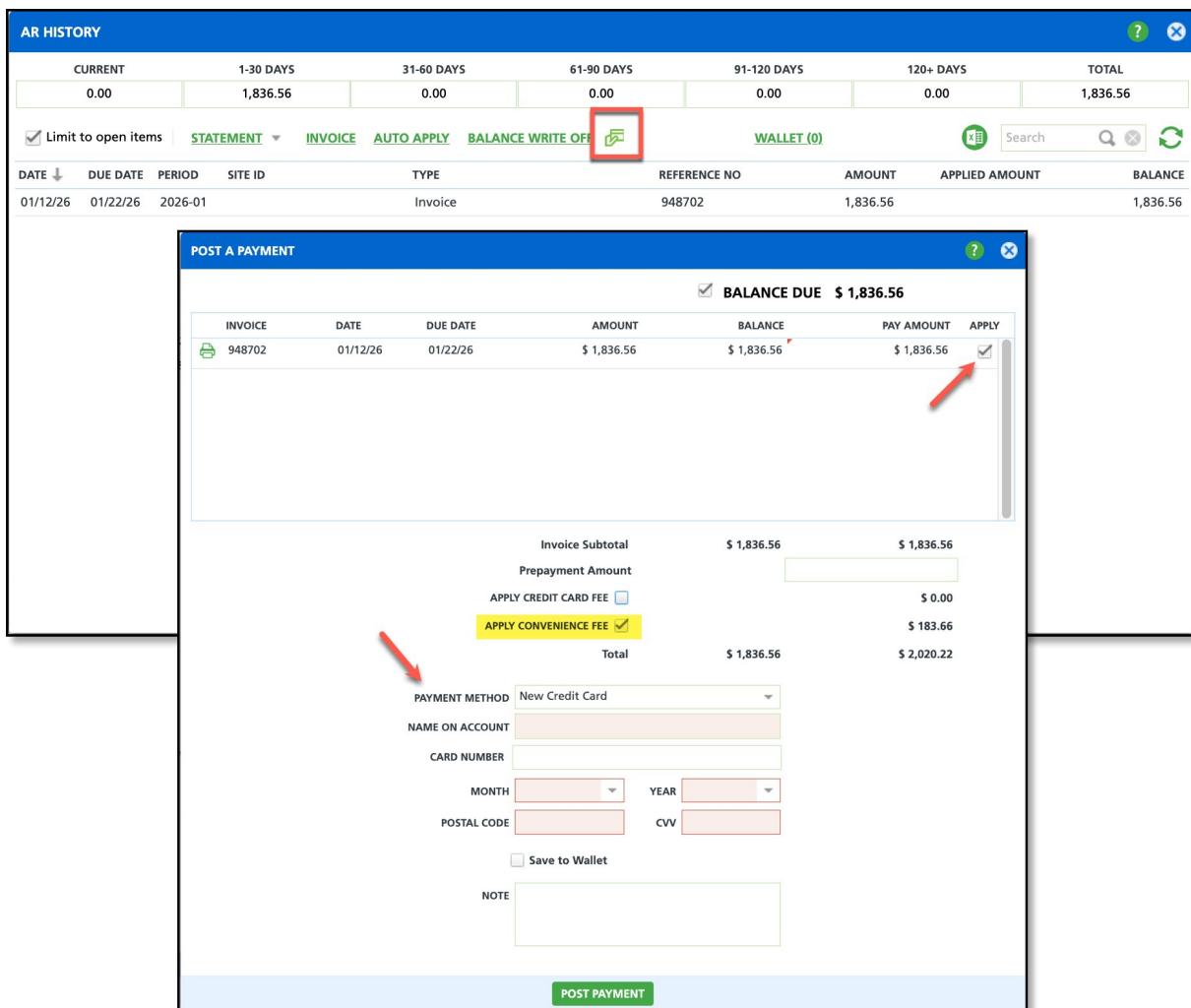
- **Manual Pay Convenience Fee Charge Code**

- 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	% 10			
MANUAL PAY CONVENIENCE FEE AMOUNT	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.



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.
 - o The convenience fee is calculated based on values entered in the **Invoice Subtotal** and **Prepayment Amount** fields.
 - o The convenience fee does not include the **Credit Card Fee**, if one is included in the transaction.