

# 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.

The screenshot displays the 'UPDATE ACCOUNT CLASS' interface with the 'Payment Processing' tab selected. Key settings include:

- ENABLE CUSTOMER PORTAL PAY PROCESSING FEE:
- ENABLE AUTO PAY PROCESSING FEE:
- DISABLE ACCOUNT WALLET: Yes
- CREDIT CARD FEE AMOUNT: 5.00
- ECHECK PROCESSING FEE TYPE: %
- ECHECK PROCESSING FEE CHARGE CODE: ACH Fee
- MANUAL PAY CONVENIENCE FEE AMOUNT: 10.00**
- AUTO PAY DECLINED FEE CHARGE CODE: Declined Payment
- ENABLE MANUAL PAY PROCESSING FEE:
- ENABLE ORDER PAY PROCESSING FEE:
- CREDIT CARD PROCESSING FEE TYPE: %
- CREDIT CARD PROCESSING FEE CHARGE CODE: Credit Card Fee
- ECHECK FEE AMOUNT: 5.00
- MANUAL PAY CONVENIENCE FEE TYPE: Amount**
- MANUAL PAY CONVENIENCE FEE CHARGE CODE: Convenience Fee**
- AUTO PAY DECLINED FEE AMOUNT: 5.55

Overlaid on this is the 'AR HISTORY' window showing a 'POST A PAYMENT' modal. The modal displays a table of invoices with a total balance due of \$305.24. The 'APPLY PAYMENT CONVENIENCE FEE' checkbox is checked.

INVOICE	DATE	DUE DATE	AMOUNT	BALANCE	PAY AMOUNT	APPLY
895341	02/01/24	02/21/24	\$ 37.68	\$ 37.68		<input type="checkbox"/>
895470	03/01/24	03/21/24	\$ 54.25	\$ 54.25		<input type="checkbox"/>
900890	05/01/24	05/21/24	\$ 18.00	\$ 18.00		<input type="checkbox"/>
903644	07/01/24	07/21/24	\$ 147.00	\$ 147.00		<input type="checkbox"/>
947548	10/03/25	10/23/25	\$ 35.00	\$ 35.00		<input type="checkbox"/>
948591	01/12/26	02/01/26	\$ 13.31	\$ 13.31		<input type="checkbox"/>
Invoice Subtotal			\$ 305.24		\$ 0.00	
Prepayment Amount						
Total			\$ 305.24		\$ 0.00	

## 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 or convenience 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.

The screenshot shows the 'UPDATE ACCOUNT CLASS' interface with the 'Payment Processing' tab selected. The settings are organized into two columns. The left column includes: 'ENABLE CUSTOMER PORTAL PAY PROCESSING FEE' (checked), 'ENABLE AUTO PAY PROCESSING FEE' (checked), 'DISABLE ACCOUNT WALLET' (Yes), 'CREDIT CARD FEE AMOUNT' (5.00), 'ECHECK PROCESSING FEE TYPE' (%), 'ECHECK PROCESSING FEE CHARGE CODE' (ACH Fee), 'MANUAL PAY CONVENIENCE FEE AMOUNT' (10.00), 'AUTO PAY DECLINED FEE CHARGE CODE' (Declined Payment), and 'BILLING AUTO PAY AMOUNT' (Invoice Amount). The right column includes: 'ENABLE MANUAL PAY PROCESSING FEE' (checked), 'ENABLE ORDER PAY PROCESSING FEE' (checked), 'CREDIT CARD PROCESSING FEE TYPE' (%), 'CREDIT CARD PROCESSING FEE CHARGE CODE' (Credit Card Fee), 'ECHECK FEE AMOUNT' (5.00), 'MANUAL PAY CONVENIENCE FEE TYPE' (Amount), 'MANUAL PAY CONVENIENCE FEE CHARGE CODE' (Convenience Fee), and 'AUTO PAY DECLINED FEE AMOUNT' (5.55). Three callouts are present: '1' points to the 'MANUAL PAY CONVENIENCE FEE AMOUNT' field, '2' points to the 'MANUAL PAY CONVENIENCE FEE TYPE' field, and '3' points to the 'MANUAL PAY CONVENIENCE FEE CHARGE CODE' field.

## 1. 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.

## 2. Manual Pay Convenience Fee Amount

- Text entry field to enter the amount associated with the selected fee type.

## 3. Manual Pay Convenience Fee Charge Code

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

# 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)

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 \$ 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.
  - 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.
    - **Note:** If a payment transaction is configured to charge both a credit card processing fee and a convenience fee, the convenience fee is included in the total payment amount, and the credit card processing fee is applied to that total.