



ACTIONPAY

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COLLECTING PAYMENTS WITH ACTIONPAY

THEY PAY
VIA EMAIL
LINK

There are 2 ways to
collect a payment from
a customer

YOU CLICK THE
BUTTON

Customer Name: Sally Sue Smith
Status: Created
Type: [dropdown]
ProcessID: *
Person Search: [input]

Area Reports: [dropdown]
1 of 2 [page navigation]
[Email] [Print] [PDF]

ABC Estimate
123 Maple Street
St. Louis, MO
sales@abccounters.com
111-111-1111
Date: 4/3/2022

Customer: Sally Sue Smith Job: #2575-ACH Paid1

Job Site:

Kitchen (#4150.0) 39.29 SqFt \$3,105.02
Includes template and installation of countertops
Granite 3cm Sunset Cream 3CM
39.29 SqFt - Granite 3cm: Sunset Cream 3CM (Cat. B)
36.41 LnFt - Edge: Eased (Cat. I)

Revenue	Payments	CC Fee	Amount Due	CC Fee Included	Created
\$3,000.02	NotLoaded	NotLoaded	NotLoaded	<input type="checkbox"/>	3/30/
\$3,105.02	\$0.00		\$0.00		

... [dropdown]

\$ Credit Card Payment \$ ACH Payment

Email

To: + [dropdown]
From: grace@actionflow.net
Subject: ABC Countertops Proposal for Job #2572, Sally Sue Smith
Job Attachments: [input]
Global Attachments: Credit Card Authorization.pdf
Body: [Rich Text Editor]
Calendar: [input]
Date & Time: [input] Duration (hours): [input]
Location: [input]
Save Attachment:

Edit Insert Page Layout View

Dear Sally Sue Smith,
Here's your quote.
Please buy our countertops.
[Pay by Credit Card Online](#)
[Pay by Check Online](#)

Include calendar attachment (.ics file)
Date & Time: [input] Duration (hours): [input]

Rich

Edit Insert Page Layout View

Dear Sally Sue Smith,
Here's your quote.
Please buy our countertops.

[Pay by Credit Card Online](#)
[Pay by Check Online](#)

When the customer clicks the payment button in their email OR you click the payment button in ActionFlow

it will take them/you to a "Checkout" page

A B C
COUNTERTOPS

Checkout

Customer	Job	Payment
Name <input type="text" value="Sally"/>	Street 1 <input type="text" value="Address"/>	Total <input type="text" value="\$ 3000.02"/>
Name <input type="text" value="Sue"/>	Street 2 <input type="text" value="Address"/>	Paid <input type="text" value="\$ 0.00"/>
		Balance <input type="text" value="\$ 3000.02"/>
		Payment % <input type="text" value="0.00 %"/>

Payment

Total	<input type="text" value="\$ 3000.02"/>
Paid	<input type="text" value="\$ 0.00"/>
Balance	<input type="text" value="\$ 3000.02"/>
<hr/>	
Payment %	<input type="text" value="0.00 %"/>
Payment	<input type="text" value="\$ 3000.02"/>
Credit Card Fee	<input type="text" value="3.50 %"/>
Payment Total	<input type="text" value="\$ 3105.02"/>

If they choose to pay by ACH, there is no CC Fee.

Payment

Total	<input type="text" value="\$ 3000.02"/>
Paid	<input type="text" value="\$ 0.00"/>
Balance	<input type="text" value="\$ 3000.02"/>
<hr/>	
Payment %	<input type="text" value="0.00 %"/>
Payment Total	<input type="text" value="\$ 3000.02"/>

If they choose to pay by CC, ActionFlow automatically adds a CC Fee

After the payment is complete,
the payment will appear in
the...

JOB LIST

Job Name	Floor	Notes	SqFt	Cabinets	Revenue	Payments	CC Fee	Amount Due
CH Paid			39.29		\$3,000.02	\$3,105.02	\$105.00	\$0.00

JOB DETAILS

Job #2572

Job Name: [] Status: Created

CONTACT INFORMATION & PERSON(S)

JOB DETAILS

QuickBooksID	Revenue Decimal	3000.02
Floor	Total Cost	\$453.31
SqFt	Trip Charge	
Cabinets	Signature	
Revenue	Glue Color	
Payments	Ignore Red Flags	
CC Fee	Splash Height	4.50
Amount Due	Sales Facility	Default
	Fabrication Facility	Default

#	Status	Plan	Floor	Cabinets	Trip Charge	Status Date
2572	Created					3/30/2022
2575	Created					3/30/2022
2576	Created					3/30/2022

Comment: Rich Text Online Payment Authorized using CC for 3105.02

ACTIONS

Action	Decision	Comment	Start
Online Payment	na	Online Payment Authorized	Jun 4/3/22 10:15 P

JOB DETAILS

ACTIONS

ACTIONS

INCLUDING CC FEES IN THE BID

If you would like to include the credit card fee as a line item in your quote, create your initial quote, then..

Find the “CC Fee Included” button in either the “Job Details” or “Job List”

The screenshot shows a software interface with a 'JOB LIST' table and a 'Job #2572' details form. In the 'JOB LIST' table, the 'CC Fee Included' checkbox is highlighted with a green box. In the 'Job #2572' details form, the 'JOB DETAILS' tab is highlighted with a green box, and the 'CC Fee Included' checkbox is also highlighted with a green box. Green arrows point from the 'JOB LIST' tab to the 'CC Fee Included' checkbox in the table and from the 'JOB DETAILS' tab to the 'CC Fee Included' checkbox in the form.

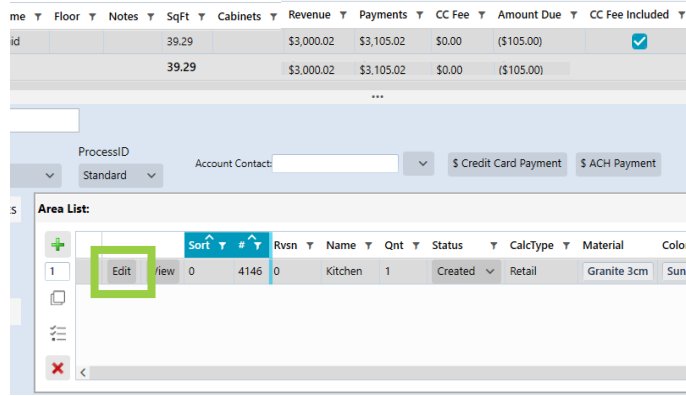
1. Check “CC Fee Included”

The screenshot shows a software interface with a table. The table has columns for Revenue, Payments, CC Fee, Amount Due, and CC Fee Included. The 'CC Fee Included' column has a checked checkbox highlighted with a green box. Above the table, there are buttons for Save, Undo, and User: Grace.

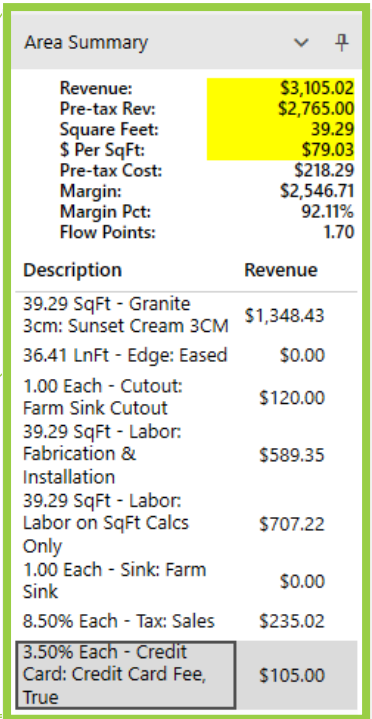
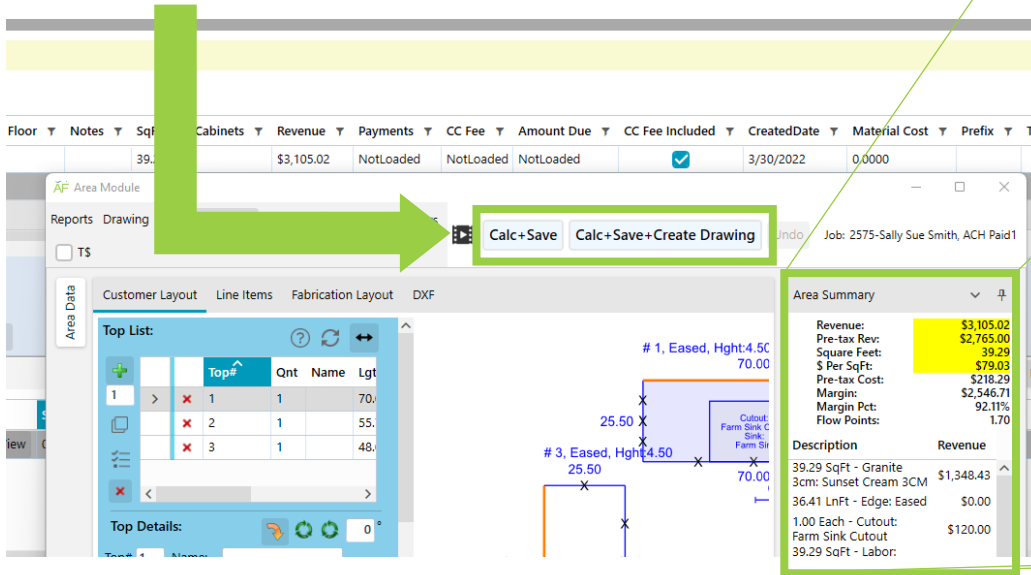
2. Hit the “Save Button”

The screenshot shows a software interface with a 'Save' button highlighted with a green box. Above the button, it says 'Welcome, Grace - ABC'. To the right of the button, it says 'User: Grace' and 'Action:'.

3. Open the "Area Module" to edit the quote.

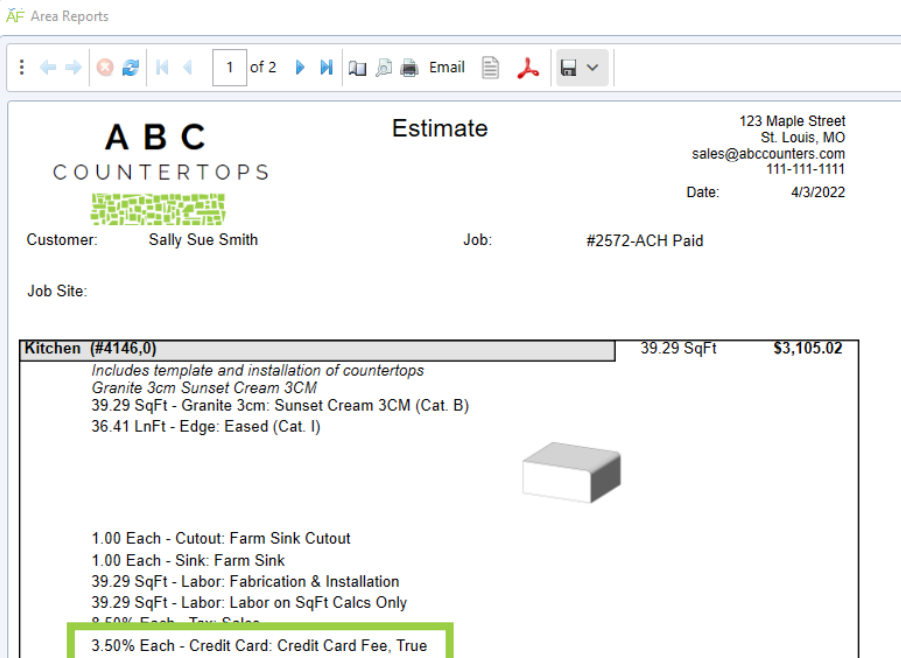


4. Hit "Calc & Save" or "Calc & Save & Create Drawing"



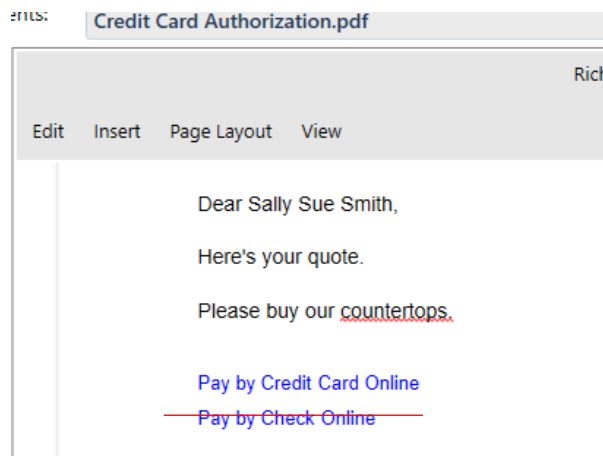
6. The CC Fee is now included in the quote.

5. ActionFlow automatically adds in the CC Fee to the line items



When it is time to collect a payment...

If you send the email, you will want to remove the "Pay by Check" option



When you or they get to the "Checkout" page

ABC COUNTERTOPS

Checkout

Customer	Job	Payment
Name: Sally	Street 1: Address	Total: \$ 3000.02
Name: Sue	Street 2: Address	Paid: \$ 0.00
		Balance: \$ 3000.02
		Payment: 0.00 %

Payment	
Total	\$ 3105.02
Paid	\$ 0.00
Balance	\$ 3105.02
Payment %	0.00 %
Payment Total	\$ 3105.02

ActionFlow does NOT automatically add a CC Fee.

After the payment is complete, the CC fee will be imbedded in the total payment



The Fee is already included in the "Payment Total"

JOB LIST

ACCOUNT					
JOB LIST					
	Revenue	Payments	Amount Due	CC Fee	CC Fee Included
>	\$3,105.02	\$3,105.02	\$0.00	\$0.00	<input checked="" type="checkbox"/>

ACTIONS

Comment: Rich Text

+	ACTIONS	Action	Position	Comment	Start
+	Done	Online Payment	na	Online Payment Authorized	Jun 4/3/22 10:15 P

History: Void