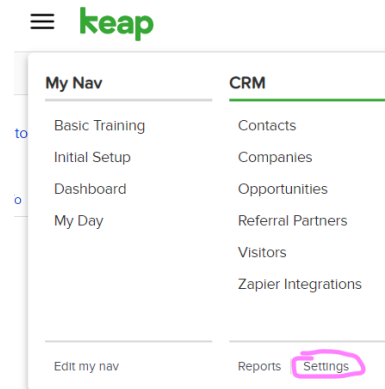
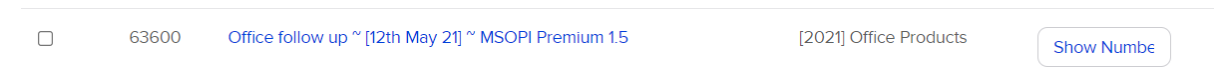


Process for Taking a Payment:

Once product has been sold go to:

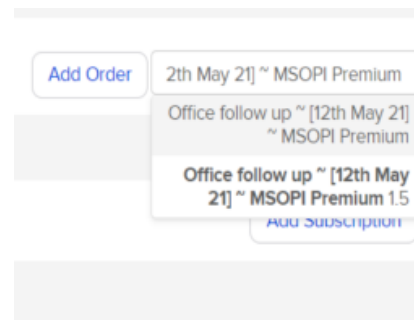


From here you need to select TAG, then in the search bar, search “office”
You will then need to find the relevant tag for example:

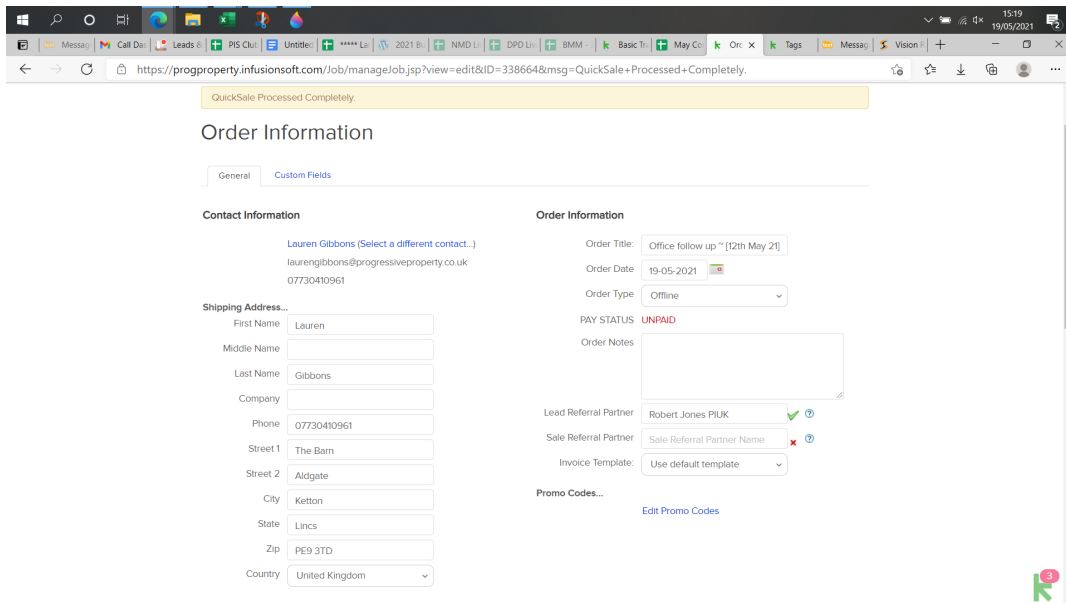


Copy the tag and go to the clients account. Make sure the address has been inputted and saved along with the country (this needs to be applied for tax purposes).

Scroll down to the tabs under the address and click on orders: from here scroll across and paste the tag the select the right tag from the drop down.



This will then take you through to a preview of the order, check the price and that the VAT has been applied scroll to the bottom and save.



Scroll down till you can see the below and click on the Add Payment button.

Order Items Recalculate Tax Add Order Item

Name	Price/Unit	Type	Total Price	Fulfillment	Modify Fulfillment	Remove
Office follow up ~ [12th May 21] ~ MSOPI Premium	£77.00 x 1	Product	£77.00	N/A	N/A	Remove
Sales Tax	£15.40 x 1	Tax	£15.40	N/A	N/A	Remove
ORDER TOTAL			£92.40			

Payments Add Payment Refund Payment

Date	Type	Status	Amount	Note
Payment Total			£0.00	
BALANCE			£92.40	

Commissions Recalculate Create Commission

Referral Partner	Commission	Item	Sold	Earned
No Commissions to Display				

Payment Plan Edit Payment Plan

Here select today's date and from the drop down select Credit Card (charge now) - You then need to [add a new card](#)

https://progproperty.infusionsoft.com/app/payment/prepareAddPaymentForInvoice?invoiceId=33863...
 https://progproperty.infusionsoft.com/app/payment/prepareAddPaymentForInvoice?invo...

Enter a Payment

Current Amount Due: £92.40
 Remaining Balance: £92.40

Amount: £

Date:

Payment Type:

Credit Card: [Add a new card...](#)

CVC:

Merchant Account:

Notes:

Apply to Commissions: Yes No

Display

Fill in the card details, Long number, expire date and security number. And save It will then go back to the enter payment screen from the credit card drop down select the card you have just added and enter the security code for that card scroll down and click Apply Payment: If the payment is successful you will see the screen below. An invoice is then automatically generated.

Contacts ▾ Companies ▾ Opportunities ▾ Referral Partners ▾ Visitors Zapier Integrations Reports ▾ Settings

The payment was successfully added.

Order Information

General Custom Fields

<p>Contact Information</p> <p> Lauren Gibbons laurengibbons@progressiveproperty.co.uk 07730410961 </p>	<p>Order Information</p> <p> Order Title: <input type="text" value="Office follow up ~ [12th May 21]"/> Order Date: <input type="text" value="19-05-2021"/> Order Type: <input type="text" value="Office"/> </p>
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