## **Process for Taking a Payment:**

## Once product has been sold go to:

My Nav	CRM		
Basic Training	Contacts		
Initial Setup	Companies		
Dashboard	Opportunities		
My Day	Referral Partners		
	Visitors		
	Zapier Integrations		
Edit my nav	Reports Settings		

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:

63600	Office follow up $^{\circ}$ [12th May 21] $^{\circ}$ MSOPI Premium 1.5	[2021] Office Products	Show Numbe	

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.

Add Order	2th May 21] ~ MSOPI Premium
	Office follow up ~ [12th May 21] ~ MSOPI Premium
	Office follow up ~ [12th May 21] ~ MSOPI Premium 1.5
	Aud Subscription

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.

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$\leftarrow \rightarrow C$ $\triangle$ https://progproperty.	infusionsoft.com/Job/manageJob.isp?view	w=edit&ID=338664&msg=QuickSale+Pr	rocessed+Completely.	messdy ;	τοιοια   Τ τ₀ ζ≞	Ť	G (	
Quicks	ale Processed Completely.							*
Orde	or Information							- 1
Orde								- 1
Gener	al Custom Fields							- 1
Contact	Information	Order Information						
	Lauren Gibbons (Select a different co	ontact) Order Title:	Office follow up ~ [12th May 21]					- 1
	laurengibbons@progressiveproperty.	.co.uk Order Date	19-05-2021					- 1
Shinning	Address	Order Type	Offline v					- 1
Fi	rst Name Lauren	PAY STATUS	UNPAID					- 1
Mido	lle Name	Order Notes						
Lé	Gibbons							
(	Company	Lead Referral Partner	Robert Janes BILIK	<i>//</i>				
	Phone 07730410961	Sale Referral Partner	Sale Referral Partner Name	0				
	Street 1 The Barn	Invoice Template:	Use default template					
	Street 2 Aldgate	Promo Codes						
	City Ketton	Promo Codes	Edit Promo Codes					
	State Lincs							
	Zip PE9 3TD							
	Country United Kingdom V							R

## $S {\rm croll} \ {\rm down} \ {\rm till} \ {\rm you} \ {\rm can} \ {\rm see} \ {\rm the} \ {\rm below} \ {\rm and} \ {\rm click} \ {\rm on} \ {\rm the} \ {\rm Add} \ {\rm Payment} \ {\rm button}.$

Order Items						Recalculate Tax	Add Order Item
Name		Price/Unit	Туре	Total Price	Fulfillment	Modify Fulfilim	ent Remove
Office follow up ~ [12th May 21] ~ MSO	Pl 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				<b>£92.40</b>			
Payments						Add Payment	Refund Payment
Date	Туре		Status		Amount		lote
Payment Total					£0.00		
BALANCE					£92.40		
Commissions						Recalculate	Create Commission
Referral Partner	Commissio	'n		Item	Sold	Earn	ed
No Commissions to Display							
Payment Plan							Edit Payment Plan

Here select todays date and from the drop down select Credit Card (charge now) - You then need to <u>add a new card</u>

https://progproperty.infusion	erty.infusionsoft.com/app/payment/prepareAddPaymentForInvoice?invo	>
Enter a Pa Current Amount Due: Remaining Balance:	92 40 592 40	
Amount: Date:	92.40 £ 19-05-2021 •	
Payment Type:	Credit Card (charge now)	
Credit Card. CVC:	Add a new Cald	
Merchant Account: Notes:	Stripe Payments (ld: 14) v	
Apply to Commissions:	● Yes ○ No	8

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 $\checkmark$	Companies 🗸	Opportunities $\checkmark$	Referral Partners $ \!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!\!$	Visitors Za	apier Integrations	Reports 🗸	Settings
The paymer	it was successfully a	dded.					
)rder	Informati	on					
0	Contrast Final A						
General	Custom Fields						
General	Custom Fields			Order Informati	on		
General	Custom Fields rmation Lauren Gibbo	ns		Order Informati	on Title: Office foll	ow up ~ [12th Ma	ay 21]
General	Custom Fields rmation Lauren Gibbo laurengibbons	ns s@progressivepropert	y.co.uk	Order Informati Order Order	on Title: Office foll Date 19-05-202	ow up ~ [12th Ma	ay 21]