Financial- How to setup a convenience/service fee for electronic payments

Last Modified on 12/07/2020 7:16 am EST

To add a convenience/service fee for electronic payments go to the Setup menu, then select system config-

Select the Payments option-

Home   Family   Payments   Attendance   Lessons   Meals   Connect   Approvals   Reports   Staff   Setup

Setup -> System Config

General Config	Extended	API	Authorization	CACFP	Credit Cards	Data Fields	Door Controller
Email	Text Message	Phone (OCN)	Notification	FTE	GL Builder	Registration	Payments
Auto-Pay	Report	Reporting Groups	Social	Statement	Storage	Tax	Time Clock
Training	Incident Fields	Valid Values					
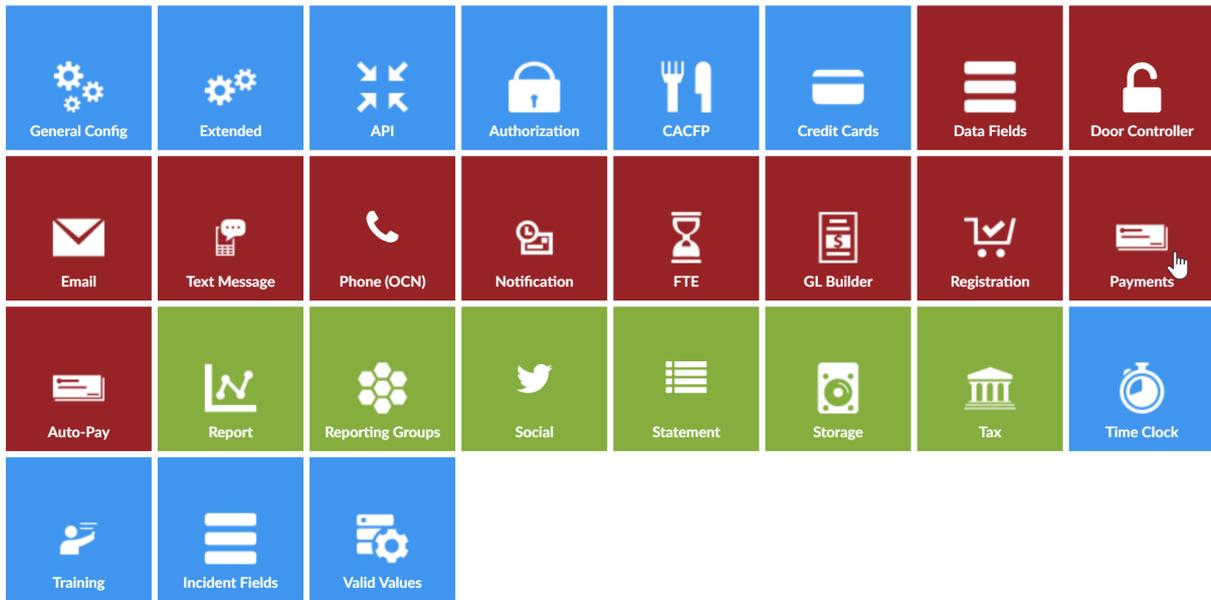
Enter the amount parents should be charged when electronic payments are charged-

Setup -> *System Config* -> Payment Configuration

Payment Configuration

General		
Allow payment method sharing between parents:	Yes ▾	⊙
Admin - Auto-Pay Batch		
Show outstanding families w/o active statements:	Yes ▾	⊙
POS Payments		
Display ACH Option First on POS Payment Screen:	No ▾	
Connect Portal		
Maximum Online Payment Allowed:		Leave blank for no limit
Display ACH Option First on One-Time Screen:	No ▾	
Display ACH Option First on Auto-Pay Screen:	No ▾	
Portal One-Time Payment Label for ACH:	E-Check	
Portal One-Time Payment Label for Cards:	Credit Card	
Portal Auto-Pay Label for ACH:	ACH	
Portal Auto-Pay Label for Cards:	Credit Card	
Deposits		
Associate Classroom and Fee to Deposits:	No ▾	
Convenience Fees		
Fee Amount/Percent Per Transaction:		Leave blank for no added fee

SAVE

View Payment Processor Settings

Once an amount is entered into the Fee Amount field additional fields will display-

- Fee Transaction Type
  - Dollar
  - Percentage
- Charge Different Conv. Fee for ACH- if a different amount should be charged for ACH transactions
- Add Fee to One-Time Payments (Family Entered)
- Add Fee to One-Time Payments (Staff- Entered)
- Add Fee to POS Payments (Staff-Entered)
- Add Fee to Auto-Payments (All)

Associate Classroom and Fee to Deposits:	No ▾	
Convenience Fees		
Fee Amount/Percent Per Transaction:	3	Leave blank for no added fee
Fee Transaction Type:	Dollar ▾	
Charge Different Conv. Fee for ACH:	No ▾	
Add Fee to One-Time Payments (Family-Entered):	Yes ▾	?
Add Fee to One-Time Payments (Staff-Entered):	Yes ▾	?
Add Fee to POS Payments (Staff-Entered):	Yes ▾	?
Add Fee to Auto-Payments (All):	Yes ▾	

SAVE

Be sure to save before exiting the screen, the changes will be immediate.