

CREATE A RECURRING CREDIT CARD PAYMENT

There are two ways to start recurring credit card payments: from inside QuickBooks and from your QuickBooks Payments account.

Set Up from QuickBooks Desktop

1. Go to Customers, then select Credit Card Processing Activities.
2. Select Set Up Recurring Payments.
3. Find the name of your customer on the search field. If it's a new customer, select Add New.
4. Under Invoice Type
 - a. If you want an invoice and payment, select Itemized List, then fill out the fields.
 - b. If you want a sales receipt, select Amount Only, then enter the amount.
5. Fill out the fields under Payment Method, then select Next.
6. Verify all info and terms of the payment setup matches with the signed authorization form, then select Submit to save or Edit if you need to make changes.

Set Up from QuickBooks Payments

1. Sign in to your account, then go to Processing Tools.
2. Select Create a Recurring Payment.
3. Find the name of your customer on the search field. If it's a new customer, select Add New.
4. Complete all the fields, then select Next.
5. Verify all info and terms of the payment setup matches with the signed authorization form, then select Submit to save or Edit if you need to make changes.



IT'S TIME TO TAKE ACTION!



There are so many ways you can this procedure.

For some great tips, head to www.smbaccountants.com.