

Payment Options In Infusionsoft

You can use PayPal and/or a merchant account to process payments. When an order is placed through the shopping cart, an order form, or via a manually created order, Infusionsoft collects the information (e.g., customer, product(s) fees, sales tax, and shipping fees).

It then calculates an order total and passes that number and the billing information (name, address, and encrypted credit card number) securely to a payment processor.

The payment processor takes that information and completes the actual financial transaction, charging the customer's credit card. It also handles the currency part of the transaction. Infusionsoft passes a number to the processor, and the charge is processed based on the currency you have set up in their system.

Payment Processor Type	Benefits	Compatible Order Method(s)	Item Type(s)
<ul style="list-style-type: none">• PayPal	<ul style="list-style-type: none">• Inexpensive to set up• Easier to qualify• Customers can pay with balance transfers	<ul style="list-style-type: none">• Shopping cart and order forms	<ul style="list-style-type: none">• Products and Subscriptions

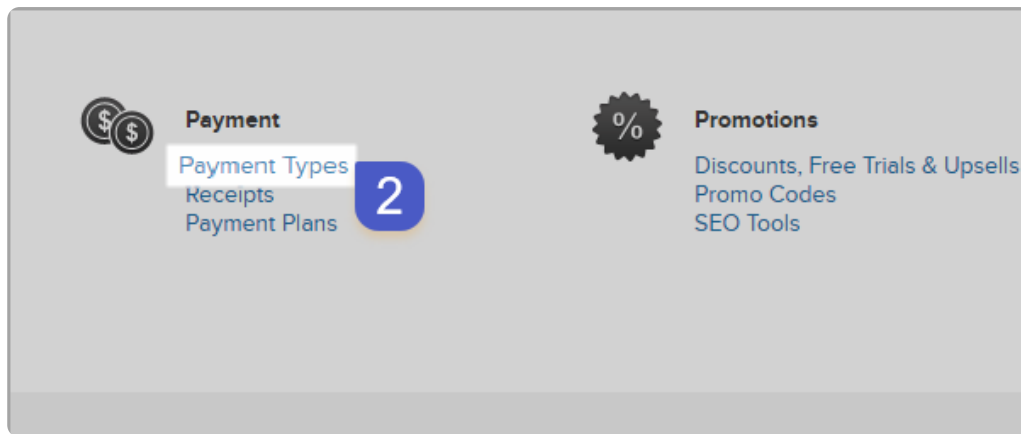
Payment Processor Type	Benefits	Compatible Order Method(s)	Item Type(s)
	<ul style="list-style-type: none"> • Pay per use, no monthly fee 		
<ul style="list-style-type: none"> • Merchant Account / Gateway <p><i>Note: Paypal Payflow Pro is a gateway. It is different from a standard business PayPal account.</i></p> <p>For more information on merchant accounts, click here</p>	<ul style="list-style-type: none"> • More robust • Customer makes the payment on your website • Credit card statement displays your business name 	<ul style="list-style-type: none"> • Shopping cart, order form, and manual orders 	<ul style="list-style-type: none"> • Product and subscription • payment plans

Setup Payment Type

1. Go to E-Commerce > E-Commerce Setup



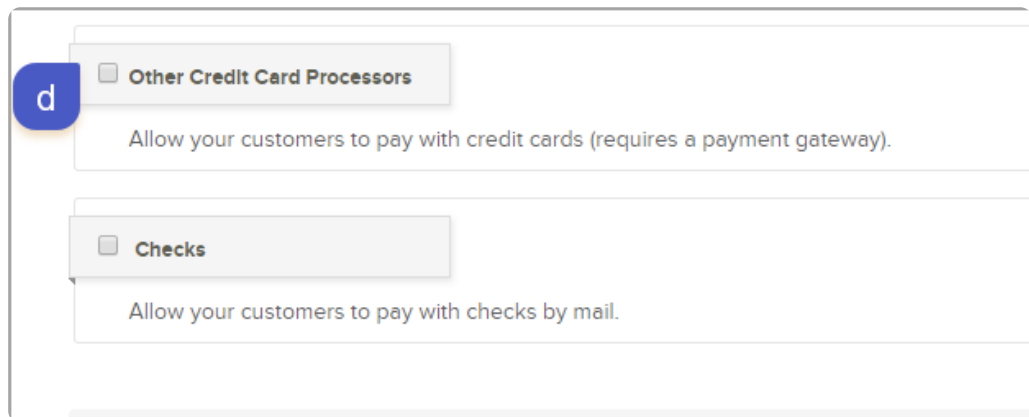
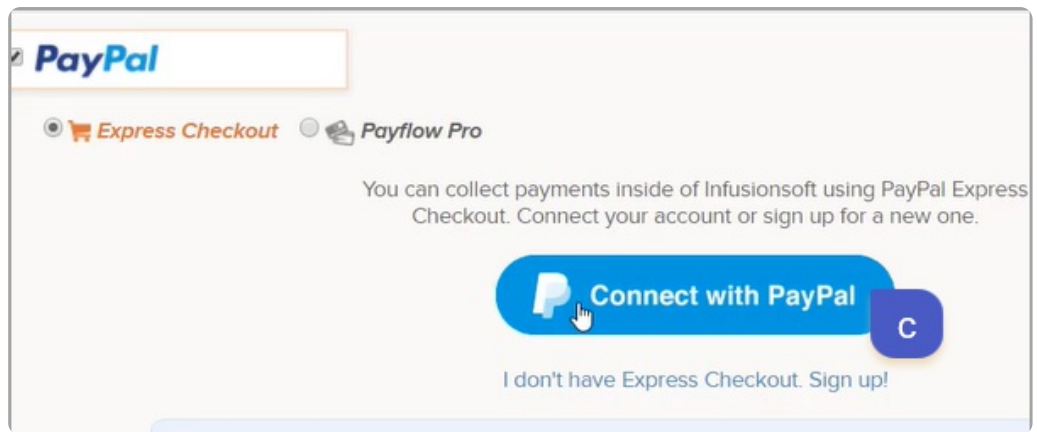
2. On the bottom left hand side click "Payment Types"



3. Select Payment type:

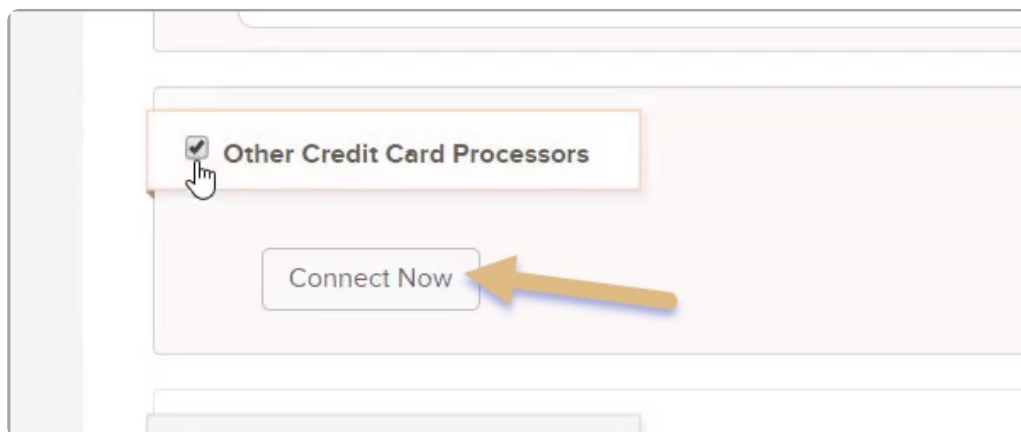
- a. For **Infusionsoft Payments** check this box. For more information regarding setup, [click here](#)
- b. Click "**use a different merchant account or payment type**" to setup other payment types
- c. Click "**Connect with PayPal**" to authorize "**Paypal Express Checkout**". For more information, [click here](#) . For Payflow Pro, [click here](#)
- d. Check "**Other credit Card Processors**" to setup a Merchant account. To view our supported merchant accounts, [click here](#)
- e. To have a "**Check**" mailed to you check this box

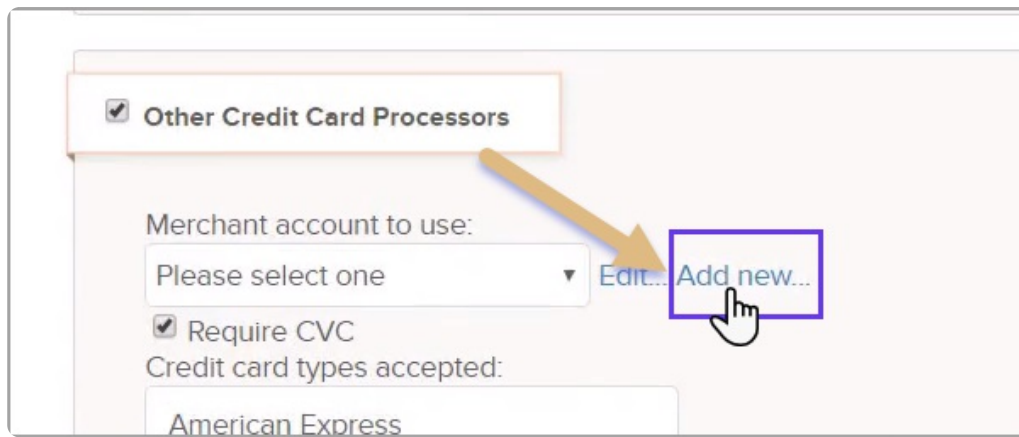
A screenshot of the 'Payment Types' configuration page. At the top, the title 'Payment Types' is displayed. Below it is a section labeled 'a' containing a checkbox and the text 'Payments'. Underneath this is a light gray box with the text 'Skip the lengthy applications & setup process and start accepting payments today.' Below that is a link that says 'Use a different merchant account or payment type' with a blue circle containing the letter 'b' next to it. At the bottom right of the page is a green 'Save' button.



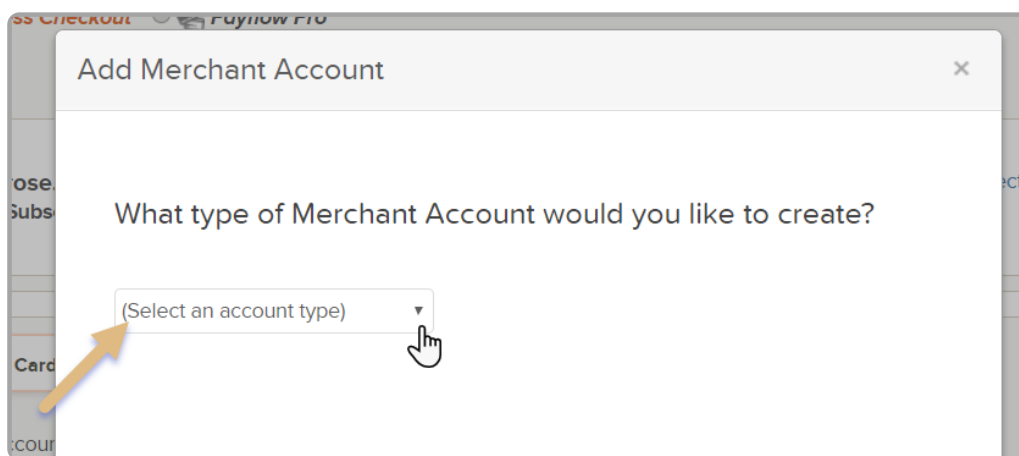
How to connect a Merchant Account

1. Click "Connect" or "Add new"

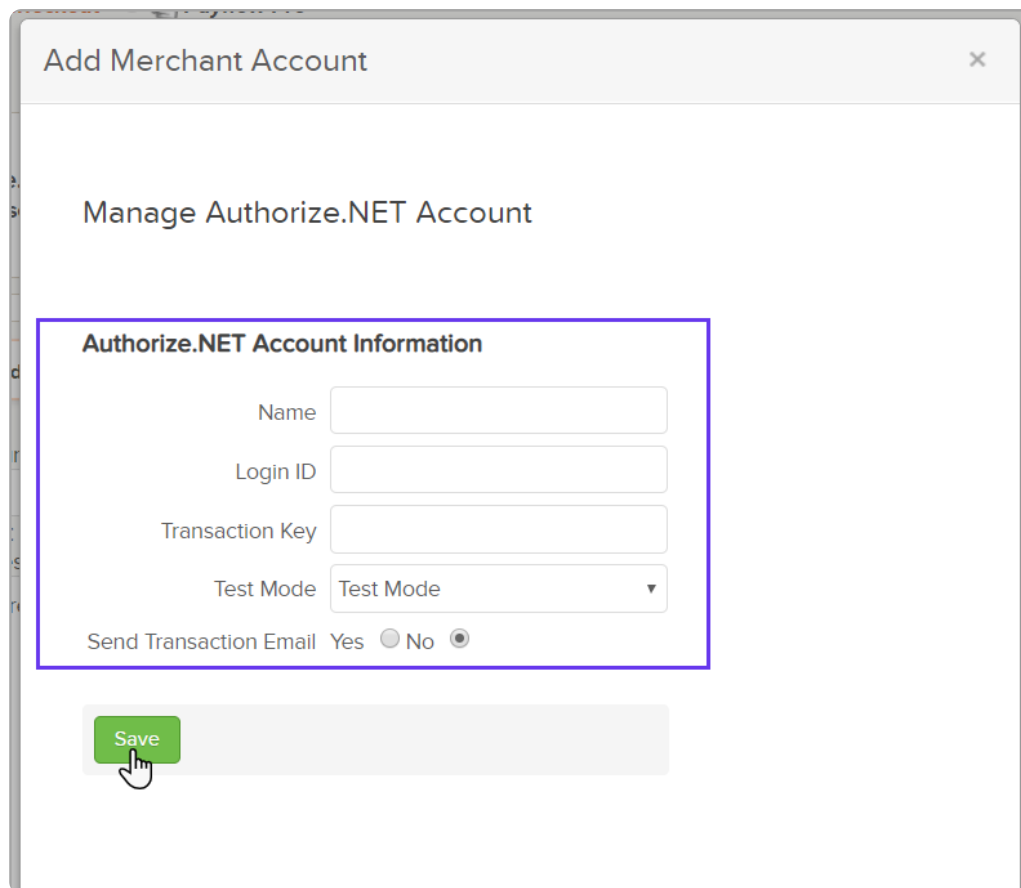




2. Select the Merchant from the drop-down



3. Enter a "Name", this can be any name that will help you identify the merchant, then fill in the account information for your merchant and click "Save"



Add Merchant Account

Manage Authorize.NET Account

Authorize.NET Account Information

Name

Login ID

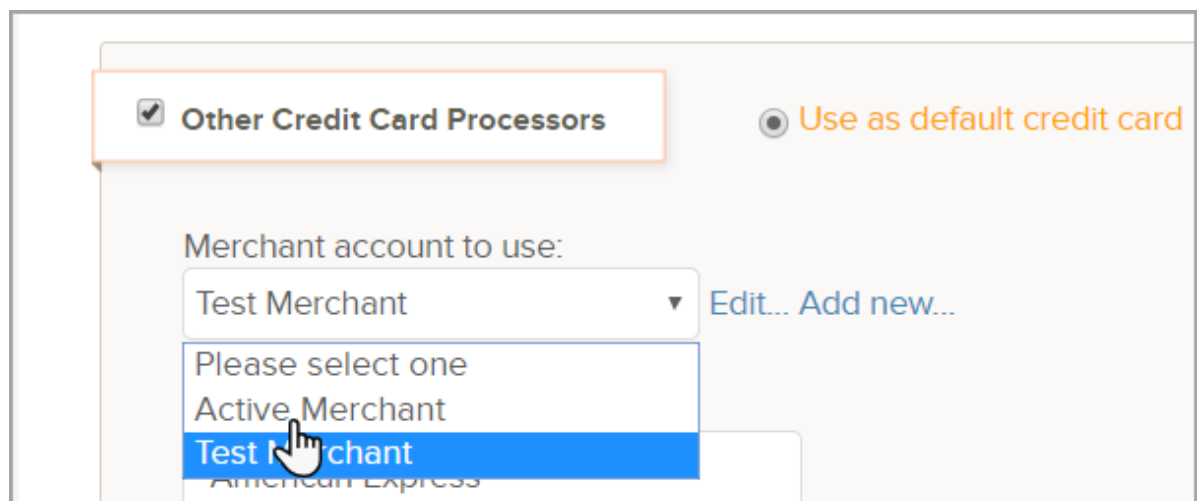
Transaction Key

Test Mode Test Mode ▼

Send Transaction Email Yes ☐ No ☒

Save

4. Check "Other Credit Card Processors" and select the merchant from the "Merchant account to use" drop-down



☒ Other Credit Card Processors ☐ Use as default credit card

Merchant account to use:

Test Merchant ▼ Edit... Add new...

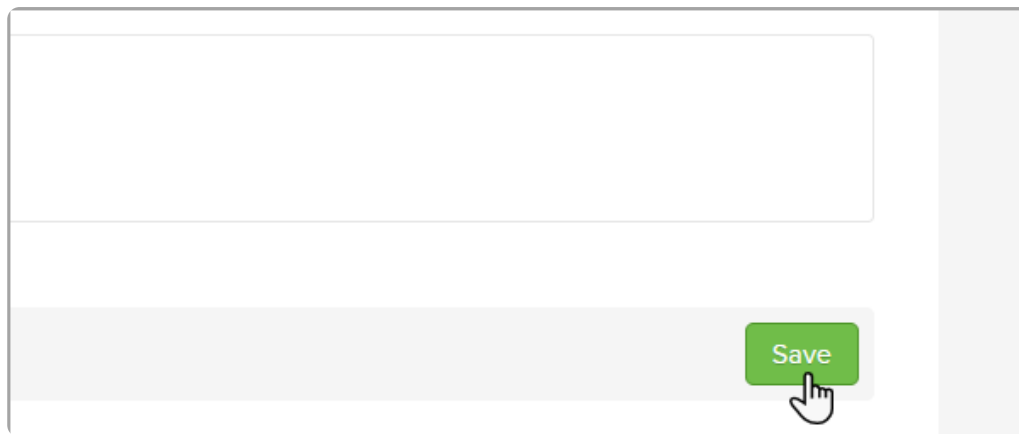
Please select one

Active Merchant

Test Merchant

American Express

5. Scroll to the bottom right and click "Save"

A screenshot of a web form. It features a large, empty rectangular input field at the top. Below this field, there is a horizontal bar with a green 'Save' button on the right side. A hand cursor icon is positioned over the 'Save' button, indicating it is clickable. The form is set against a light gray background.

Setup Check Payments

Enter the information your Customers will need to send a paper check to you. Checks are not an ACH - (A Direct Payment processed as an ACH pulls funds from the consumers account electronically.)

Make Payable To	Hyman J. Buss
Company Name	alwayshelpful
Your Name	Hyman J. Buss
Address Line 1	2510 Barnes Street
Address Line2	
City	Orlando
State	FL
Postal Code	32801
Country	United States
Special Instructions	Send payment within 2-3 business days

Note: Check are only accepted through the [Shopping cart](#) or [Purchase link](#) but not through an order form.

