# Infusionsoft Mobile Payments IOS 🔗

An Active **US Infusionsoft Payments** account is required to use the Infusionsoft Mobile Payments feature.

Learn how to view, create, and collect payments for orders on your mobile device with Infusionsoft Mobile.

For information on connecting your Infusionsoft Payments Mobile Card Reader, please see This Article .

Known Issue: If you attempt to process a payment for a contact with no email in its Email 1 field through the Recent Orders Screen, the contact may not receive a receipt email when the payment is processed. This is true even if the contact has data in its Email 2 or Email 3 fields. **Workaround**: Always complete a contact's Email 1 field before processing payments.

1. Expand the menu and tap **Orders**
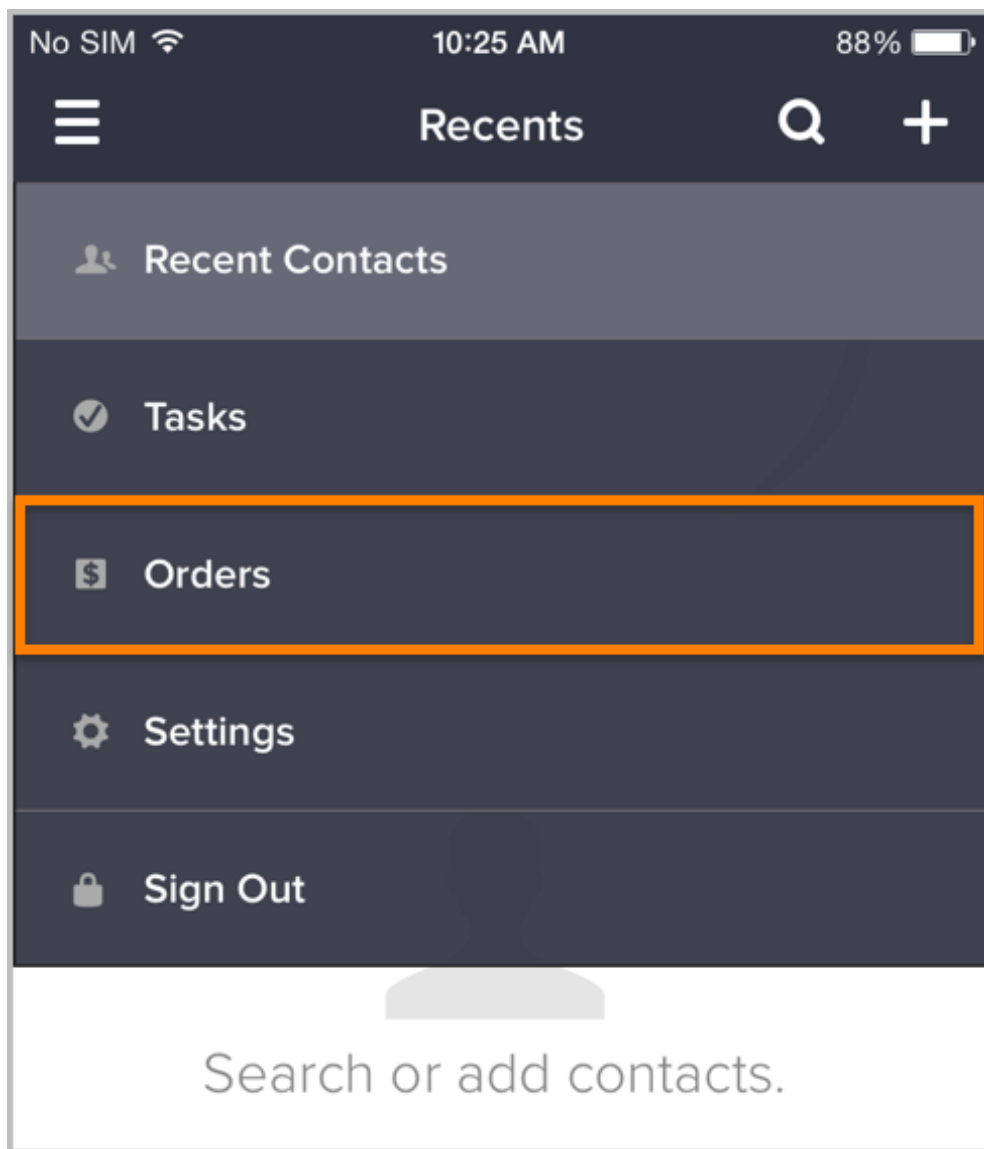
2. Tap on an order to view the order details and payment status

No SIM 📶	3:20 PM	98% 🔋
☰	**Orders**	➕

Today

Christina Kehoe	**$147.49**
#760	PAID

Fri, Feb 19

Christopher J Wagner Jr	**$25.61**
#758	UNPAID

Chris Wagner	**$699.00**
#756	PAID

Thu, Feb 18

Bob Thorton	**$100.00**
#754	UNPAID

Janine Furmore	**$599.00**
#752	UNPAID

Christine Walker	**$85.00**
#750	UNPAID

Mon, Feb 15

Chris Wagner	**$85.00**
#748	UNPAID

3. Tap on the person icon to open the contact record attached to the order. Tapping an item on this screen will expand the description.

< **Order 760**

Christina Kehoe

12oz Bag of Coffee	1	$20.00
EMV Test	1	$25.61
Scotch	1	$100.00
Snickers Bar	1	$1.49

Order Discount	-$14.71
Sales Tax	$15.10
Total	**$147.49**

PAID

4. To create an order, tap **+** in the Order List view.

☰   Orders   +

Today

Christina Kehoe	$147.49
#760	PAID

Fri, Feb 19

Christopher J Wagner Jr	$25.61
#758	UNPAID

Chris Wagner	$699.00
#756	PAID

Thu, Feb 18

Bob Thorton	$100.00
#754	UNPAID

Janine Furmore	$599.00
#752	UNPAID

Christine Walker	$85.00
#750	UNPAID

Mon, Feb 15

Chris Wagner	$85.00
#748	UNPAID

5. From your product list, tap the items you would like to add to the order. Items will

be automatically added to the cart and the total will be calculated at the top. You can add a custom product and amount by tapping the plus button at the top.

No SIM 📶   3:21 PM   98% 🔋

Cancel   **Add Items**   Next

$163.87 Including Tax

4 items

Custom Amount	$0.00 ⊕
12oz Bag of Coffee	$20.00
EMV Test	$25.61
Gift Basket	$100.00
Gymflix	$5.99
iPhone 6S	$599.00
Scotch	$100.00
Snickers Bar	$1.49

6. When you select an item with product options, fill in the required options (such as subscription plan or size) then tap **Done** to add it to your cart.

7. On the review order screen, you can view the order items, details and total.
    - You can tap the quantity field to change the quantity of a particular item.
    - You can slide from right to left to delete an item in your order.
    - You can tap an Item to view and change its Product Options (if it has options.)
    - You can tap **Add Discount** to enter in a discount for the order.
    - You can tap the Tax field to create and add a tax percentage to the order.
    - Tap the **Next** button to start the payment process.

‹   Review Order   Next

12oz Bag of Coffee *No Subscription.*	1	$20.00
EMV Test	1	$25.61
Scotch *No Subscription.*	1	$100.00
Snickers Bar	1	$1.49

Add Discount

Sub Total	$147.10
Tax	$16.77
Total	**$163.87**

8. To add a discount to your order, fill in either a percentage or dollar amount and click **Done**.

Cancel   **Manage Discount**   Done

$132.39

10%	$14.71

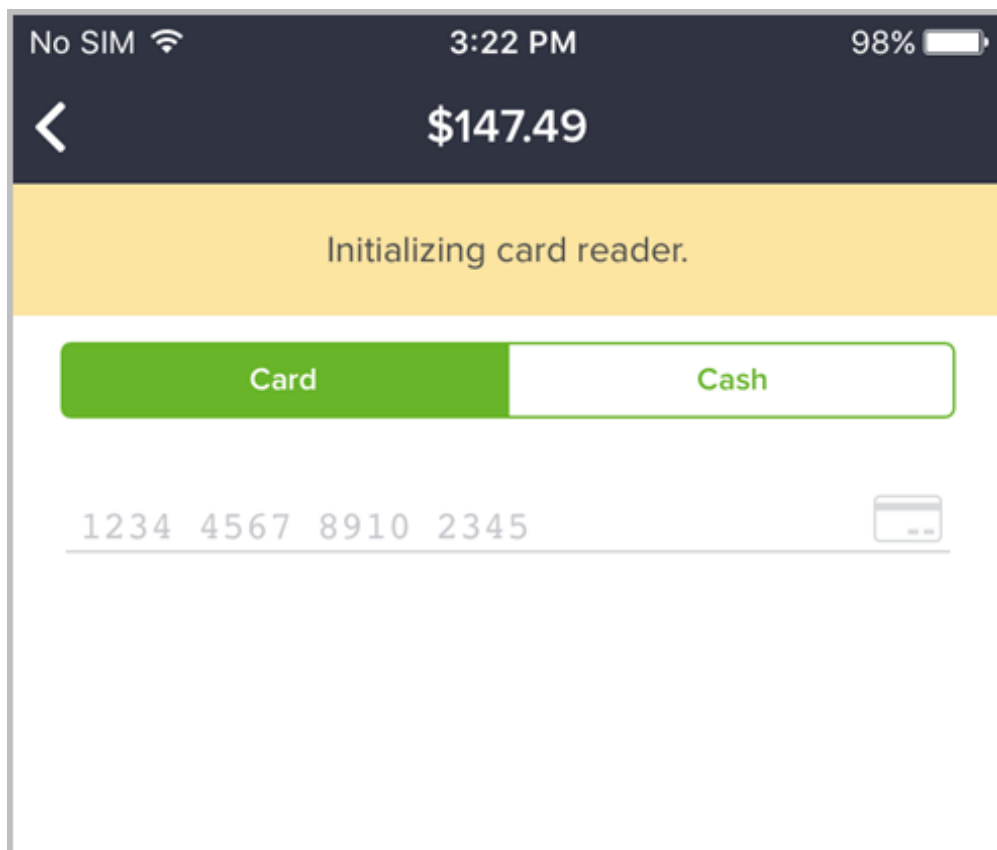| 1	2 ABC	3 DEF
4 GHI	5 JKL	6 MNO
7 PQRS	8 TUV	9 WXYZ
.	0	⌫

9. To add tax to your order, toggle a previously set tax by tapping the switch. To add a

new tax, fill in the top field with a label and percentage then tap the **+** button. Tap **Done** to add it to your order.
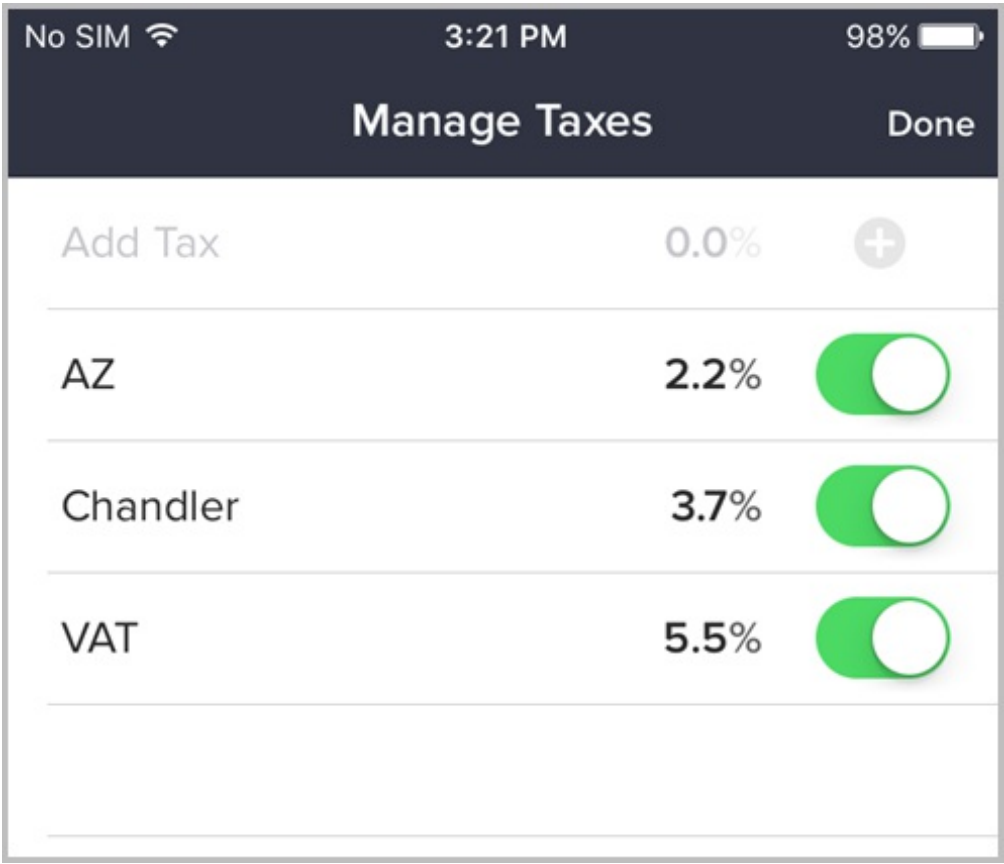
10. After reviewing your order, tap a payment method to begin either the Card or Cash process.

11. If the customer is paying with Cash, enter the amount tendered to automatically calculate the amount of change to be given. Tap Pay to advance to the "Assign Contact" screen.

12. If the customer is paying with a credit card, you can choose to manually enter the card information into the required fields, or you can insert an Infusionsoft Payments

card reader and insert the card when the screen indicates it is ready.

- When you see the "Ready for Swipe or Dip" screen, you can insert a card for payment.
- If an error occurs, you may need to reinsert, check your network connection, or use a different card.
- Wait for the card to tokenize. It will automatically advance to the Assign Contact screen once approved.

13. If the customer is already a contact, their name will appear under "Existing Contacts" on this screen.

- You can add a new contact by tapping Add New Contact.
- You can tap Search Contacts to quickly find an existing contact.
- The contact being assigned must have an email address. You will be prompted to add an email to an existing contact if it does not already have one.
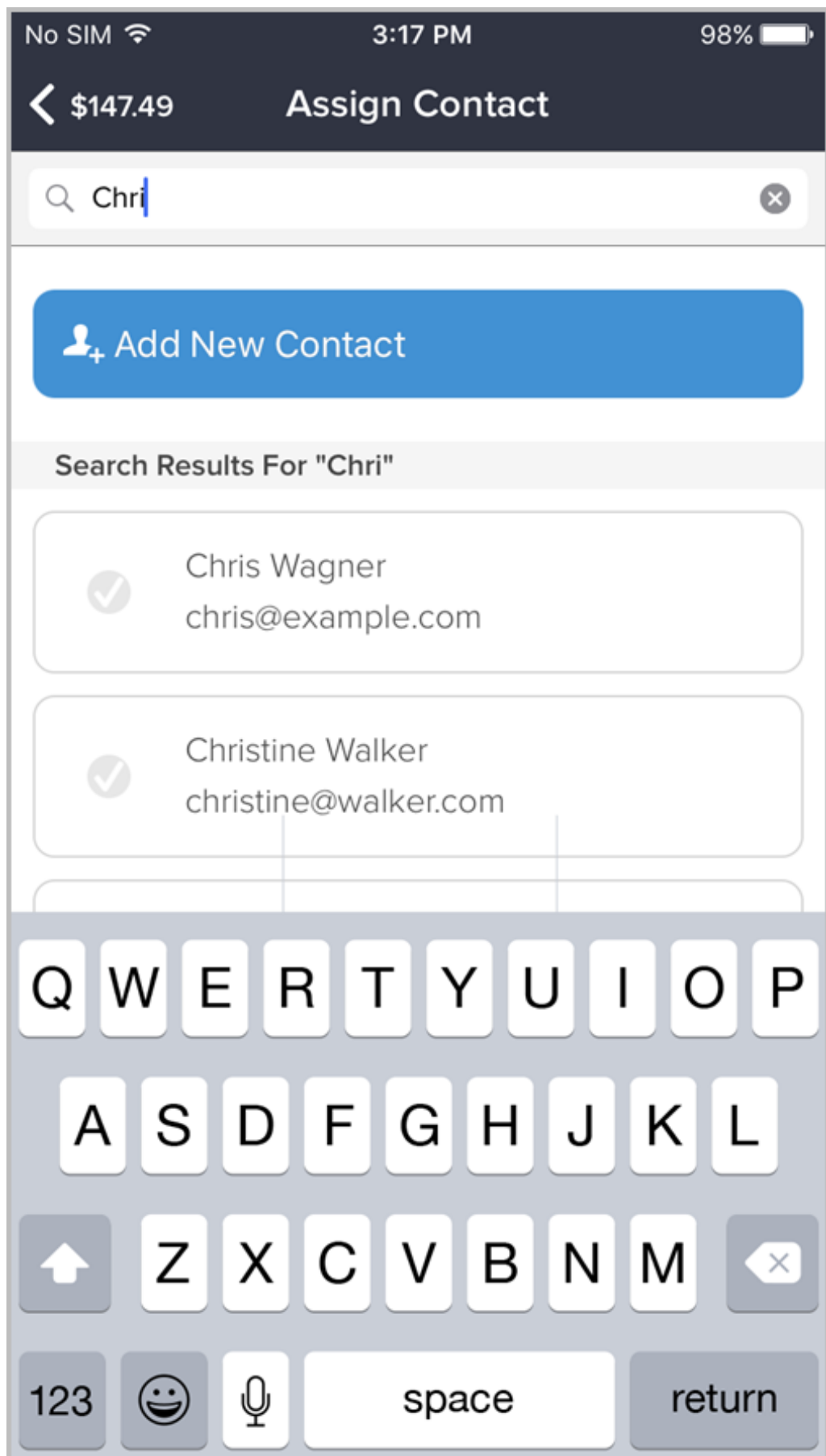
14. The customer's first and last name will be auto-populated if a credit card was used to pay. You can add additional information as needed.

- Email is required for the receipt to be sent.
- Ensure you have permission to send to this contact by checking the box below the Email field.
- Tap **Save** to automatically advance to the Order Details Screen.

15. To accept the order details, swipe up to process.

Cancel

You are about to create an order for

Frank Smith

fsmith@bhi.com

for the amount of

$147.49

^

Swipe Up to Process Order

16. Hand the mobile device over to customer at this screen. The customer can sign for the order and tap **Accept** when the payment has completed processing.

Problems with your credit card reader? If you experience a problem with your Infusionsoft Mobile credit card reader, please first contact Infusionsoft support . If a hardware issue is identified, Infusionsoft support will provide instructions for returning and claiming a replacement from the manufacturer.