Add A Payment Plan To A Manual Order %

After an order is created a payment plan can be added or altered. The payment plan allows a customer to pay for a purchase in one or several installments. Infusionsoft will automatically charge the card on file as long as a merchant account is set up.

1. While viewing a contact record, click the **Order** tab.

2. Click on the name of the order to open it.

3. Go to the *Payment Plan* section and click on the **Edit Payment Plan** button.

4. Enter the Auto Charge Settings
   - **Auto Charge**: Set this to 'Yes' if the credit card should automatically be charged through a Merchant Account. Note that payment plans are batched throughout the day, so it will likely not autocharge immediately. Also, when shopping cart or order form orders are created via the API, the order that is using the payment plan is not going to post as soon as the record is created.
   - **Credit Card**: Select a credit card from the drop down or click on the Add button to enter a new Credit Card. The system will attempt to charge the credit card on file when the next batch of charge attempts processes (Could take up to 6 hours).
   - **Max Charge Attempts**: Enter the maximum number of times the system should try to auto-charge a credit card.
   - **Num Days Between Retry**: Enter the number of days the system should wait between auto-charge attempts.

5. Enter the Payment Plan Details
   - **Initial Payment Amount**: This amount generally includes up front fees, shipping, and taxes.
   - **Initial Payment Date**: Enter the payment date (usually today's date, but can be set to a future date.)
   - **Plan Start Date**: Enter the date for the first charge of the remaining installments after the initial payment. If the Plan Start Date and Initial Payment Date are the same then the first payment will include the Initial Payment Amount and the first payment amount. (Example: For a total sale of $1200, the customer might pay an initial payment of $500. The remaining $700 may be broken into 2 payments of $350 each. The first payment would be $850 if the Plan Start Date and Payment Date is the same.)
   - **# Payments**: Enter the number of remaining payments, excluding the initial payment amount entered already (Example: For a total sale of $1200, the customer might pay an initial payment of $500. The remaining $700 may be broken into 2 payments of $350 each.)
   - **Days Between Payments**: Enter the number of days to wait between the remaining payments. This defaults to 30 days, but can be changed.

6. Click the **Save** button to save the payment plan.
   Note: A charge that should be taken on the day the payment plan is setup can take up to 6 hours before attempting to charge automatically.