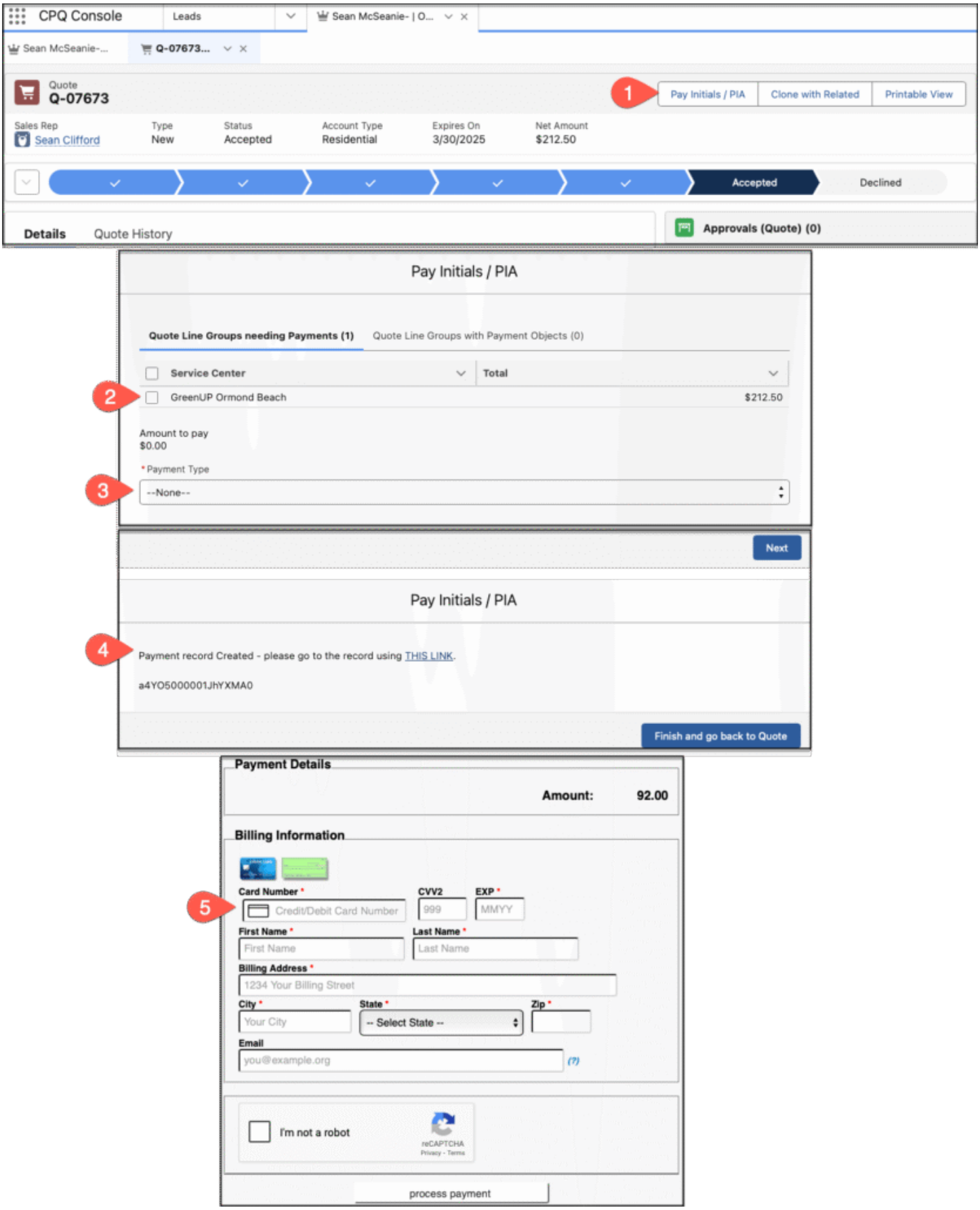
QRG PAY.9 – Pay Initial at Time of Sale

Quick Reference Guides · https://milo.masseyservices.com/docs/qrg-pay-9-pay-initial-at-time-of-sale/

How to Pay Initials

1. After the quote is accepted, click on "Pay Initials/PIA."
2. In the popup window, select the service center for the related charges.
3. Then select the payment type from the dropdown.
4. A new popup will appear letting you know the customer payment record has been created.
5. A link is sent to the account email for the customer to enter their credit card or checking account information.


CPQ Console
Leads
Sean McSeanie- | O...
Sean McSeanie-...
Q-07673...
Quote
Q-07673
1
Pay Initials / PIA
Clone with Related
Printable View
Sales Rep
Sean Clifford
Type
New
Status
Accepted
Account Type
Residential
Expires On
3/30/2025
Net Amount
$212.50
Accepted
Declined
Details
Quote History
Approvals (Quote) (0)
Pay Initials / PIA
Quote Line Groups needing Payments (1)
Quote Line Groups with Payment Objects (0)
Service Center
Total
2
GreenUP Ormond Beach
$212.50
Amount to pay
$0.00
* Payment Type
3
--None--
Next
Pay Initials / PIA
4
Payment record Created - please go to the record using THIS LINK.
a4YO5000001JhYXMA0
Finish and go back to Quote
Payment Details
Amount:
92.00
Billing Information
Card Number *
5
Credit/Debit Card Number
CVV2
999
EXP *
MMYY
First Name *
First Name
Last Name *
Last Name
Billing Address *
1234 Your Billing Street
City *
Your City
State *
-- Select State --
Zip *
Email
you@example.org
I'm not a robot
reCAPTCHA
Privacy - Terms
process payment

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